

THE YEAR OF THE ELECTRIC CAR


SCENARIOS FOR SOUTHERN AFRICA




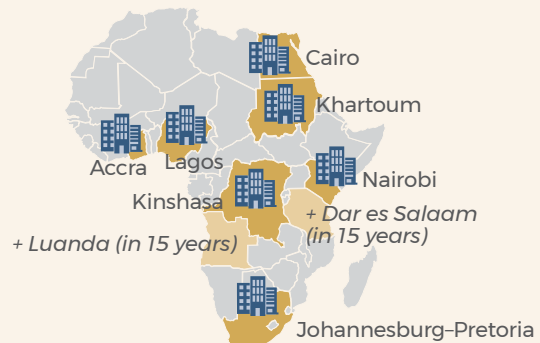
KEY CERTAINTIES

Factors that are more **known** and **predictable**, ie, agreed long-term trends and givens. They can be **descriptive** (the nature of the institution/the environment it operates in), **normative** (ethically and governance-oriented) or **aspirational** (the rules needed to be successful). These key certainties can change over time. Key certainties identified include:

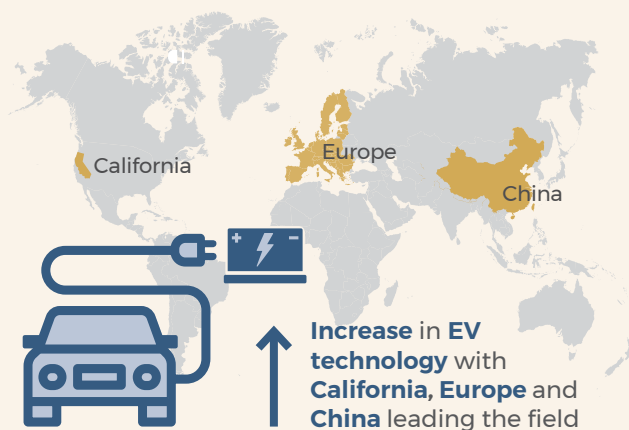
URBANISATION

 = 21% of projected world **urban population**

 **megacity** = population over 10 million



EV TECHNOLOGY



CLIMATE CHANGE

Climate change is **accelerating** and **climate vulnerability** is **growing** in **Southern Africa**



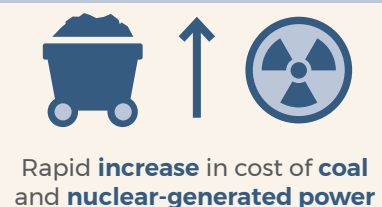
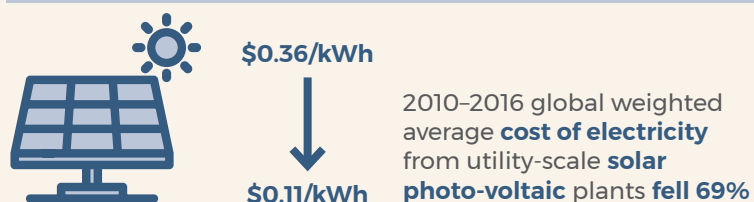
10% decline in rainfall expected per year



severe drought in
Namibia Botswana
South Africa

Severe drought impacted negatively on **livelihoods, agriculture, employment and tourism**

ENERGY COSTS



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KEY UNCERTAINTIES

Key uncertainties are the ‘**known unknowns**’ and include **wild cards** (low probability/high impact events), **risks** and **opportunities** and possible **trend breaks**. They are the key factors that might **emerge** and **shape the future**, but the **directions of change are unknown**. What is important, however, is their **impact** and the **lack of knowledge** that humanity/society has about them.

These uncertainties drive the identification of the two-by-two axis of **possible scenarios**. Issues of fundamental **disagreement among stakeholders** and **experts** are also **treated as uncertainties**. Key uncertainties identified include:



The **speed** at which Southern African states will **adopt EVs**, as in the past consumer trends in the automobile sector have been inelastic, making it difficult to predict when and by what margin EVs will be adopted in Southern Africa



Will the **youth** of Southern Africa proceed straight into **auto-sharing models** rather than buying personal vehicles?



South Africa's traditional **protection** of its **auto-manufacturing sector** is a given, but it is uncertain to what lengths it will go to protect the traditional automotive sector rather than encouraging a shift towards EVs



Successful EV adoption will require strong **cross-departmental collaboration** at all levels within the region, but whether SADC has effective platforms to facilitate this collaboration remains uncertain



The availability of necessary **infrastructure** remains a key uncertainty. Will EV owners be able to recharge at strategic points throughout the region or will technology first have to develop to a point of battery exchangeability for EVs to truly take off locally?



Can EVs be introduced in the region in an **inclusive** manner or will they **remain the domain of the well-off**?