OPERATION VULINDLELA

Supporting
the Implementation
of Priority Structural Reforms

OPERATION VULINDLELA REPORT

OPENING THE ROAD, DRIVING CHANGE

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SA-TIED
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TABLE OF CONTENTS

OPERATION VULINDLELA

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1. INTRODUCTION

Early in Cyril Ramaphosa's first term as president, a group of policymakers convened to try to understand just how dire the condition of the South African economy was and to discuss what needed to be done.

Their discussions grew into a landmark paper, later published by the National Treasury, entitled 'Towards an Economic Strategy for South Africa' (National Treasury, 2019):

> 'The current state of the South African economy is unsustainable. Low economic growth entrenches poverty and inequality. High income inequality aggravates social fragmentation and poses a risk to economic growth. Inequality contributes to extremely divergent views, which make compromises difficult—the resulting stalemate and policy uncertainty can contribute to economic weakness.'

GDP per capita had declined since 2015, unemployment had risen from already high levels, and productivity growth was slow, 'and appeared to be slowing,' the paper warned.

At the time, Nhlanhla Nene was the finance minister of South Africa. He had urged the Economic Policy team to come up with a strategy for growth.

The paper identified a litany of development weaknesses: inefficiencies in energy and logistics, poor education, arcane regulations that worked against small businesses, entrenched spatial inequality and high travel costs, and a deterioration in investor confidence.

But the paper also identified specific blockages to development: inadequate public transport systems in divided cities, resulting in the working poor spending up to 40% of their income on transport; a severe skills shortage; the parlous state of many municipalities; and the deterioration of what it called South Africa's network industries—energy, water, telecommunications, and transport.

Duncan Pieterse, now Director-General of the National Treasury, who coordinated the paper, recalls how, after Nene had resigned in 2018, the then-newly appointed finance minister, Tito Mboweni, had called him at Harvard where he was studying at the time and told him he was going to release it to government (Pieterse, D., personal communication, 19 March 2026).

It was an unorthodox move in a context where policy papers usually go through a series of hurdles including clusters of Directors-General, Inter-Ministerial Committees, Cabinet Committees, and so on. The ANC, the then-ruling party, was reportedly displeased at the apparently unorthodox release of such a critical policy paper.

But the late Mboweni held his ground. The economy, especially after years of load shedding, was, if not on the cusp of disaster, close to it. In an interview, Pieterse said:

> 'We knew that at some point the lack of growth was going to make fiscal sustainability impossible to achieve. And so, the idea was to work both concurrently on fiscal sustainability and a plan for structural reform and growth.... If growth did not come at some point, the pressure that the fiscal heavy lifting would have to do would be unbearable.'

2. OPERATION VULINDLELA

While the paper identified a number of structural reforms to boost economic growth, President Ramaphosa had already tasked his team with establishing a delivery unit in the Presidency to drive the implementation of reforms in a context marked by weak state institutions and opposition from vested interests. The 2019 National Treasury paper arrived just as the Project Management Office (PMO) was being established as a 'delivery muscle' to advance the President's strategic priorities. The idea of Operation Vulindlela thus emerged as a joint delivery mechanism between the Presidency and National Treasury to drive implementation of far-reaching economic reform programmes. Operation Vulindlela was launched a year later in 2020 after Finance Minister Mboweni (who named it) decided that the growth reforms outlined in the paper were meaningless without a dedicated team to drive their implementation. The initiative was announced a year later by the President to a joint sitting of Parliament. In the lead-up to the President's announcement, a small team from the Presidency and National Treasury met frequently to identify the priorities that it would take on. The ethos of Vulindlela ('open the way') was, and is, to single out key blockages to economic growth that could be tackled effectively and relatively quickly, and with as few bureaucratic delays as possible.

The early Operation Vulindlela team noted in 2020 that the implementation of structural reforms had been slow. Within government, it was pitched not as just another new plan, but as a delivery unit to ensure the efficient, effective, and expeditious implementation of approved priority structural reforms.

The initial Operation Vulindlela team was led by Duncan Pieterse, who was the Head of Economic Policy in the National Treasury at the time, and Sean Phillips, who is now the Director-General of the Department of Water and Sanitation. On the Presidency side, the Operation Vulindlela team was led by Rudi Dicks, the Head of the President's PMO, and Saul Musker, the Head of Strategy and Delivery Support in the PMO. The National Treasury team was later joined and led by Nomvuyo Guma and Aalia Cassim in the National Treasury's Economic Policy team.

Operation Vulindlela was launched in the aftermath of one of the worst national crises to hit South Africa since democracy—the COVID-19 pandemic. But although the situation seemed to present a plethora of priorities, the first phase of Operation Vulindlela focused on reforms in a handful of major sectors: energy, water, transport and freight, visa reform, and telecommunications. The project was—and is being—run by a small team from the President's Office and the National Treasury. This presents a caveat. As Rudi Dicks warns, 'It is not sustainable to run government like this' (Dicks, R., personal communication, 24 March 2026).

But there is also a positive—it enables a team to single out the most important blockages to growth with the backing of the finance minister and the President. One of Operation Vulindlela's most important strengths has been to assemble a dynamic team of committed, mostly young public servants from both the Presidency and the National Treasury, able to adopt a different way of working from the centre of government. 'You don't want to boil the ocean,' says Dicks. 'You want to single out the most critical issues [in growing the economy].'

Many were supply constraints, which policymakers have more control over than demand and which 'is dependent on a number of factors: global markets, geopolitics, whether we have the fiscal space for incentives, and a whole series of different things,' according to Dicks.

To tackle these constraints, government needed to be able to deliver and implement with speed. It is often criticized for being strong on policy positions but weak on implementation. Thus, the Operation Vulindlela team adopted a governance concept made popular by the British academic Michael Barber, who worked for the Blair administration in the UK in the early 2000s: 'deliverology'.

The philosophical underpinning of Operation Vulindlela was deliverology. It was deliberately not comprehensive, but rather a focus on a limited number of priority reforms.

'Operation Vulindlela did not supplant the ministries responsible for implementing the reforms; instead, it aimed to fast-track the implementation of the reforms through monitoring and reporting their progress, identifying potential risks and causes of delays, and intervening where necessary,' according to a progress report prepared for SA-TIED (Msimango et al., 2025).

Moreover, the emphasis is on playing a supportive role rather than a punitive one. The aim of engagement and escalation is to aid in resolving challenges, especially those that are beyond the control of the reform implementer.

Sean Phillips recalls how perhaps the biggest single supply-side crisis—load shedding—was dealt with before OV: Directors-General within the energy cluster reported to Cabinet, but there was 'little strategic view' on how to address the energy deficit. 'In typical style, all they did was to report positively about themselves' (Phillips, S., personal communication, 9 March 2026).

The reports, Phillips said in the interview, 'showed a lot of detailed activity and all the progress being made … [but there was] no strategic analysis and no honest assessment that actually we were still going backwards as far as load shedding was concerned.'

The key areas for reform that Operation Vulindlela focused on in the first phase—some of which were also focused on in the second—were:

- Energy
- Water
- Transport and logistics
- Reforming the visa system
- Telecommunications

2.1 ENERGY

Organized business lobbies such as Business Unity South Africa (BUSA) had met with the Mineral Resources and Energy ministry and the Presidency several times about the escalating crisis in the economy caused by load shedding. But although there were attempts to ameliorate the crisis, there was no systemic approach to solving it. Partly this was the result of a political reluctance to allow in more private-sector players. Operation Vulindlela facilitated a key reform in the first phase that lifted the licensing threshold for Independent Power Producers, which previously had been restricted to supplying energy only to the Renewable Energy Independent Power Producer Procurement Programme (REIPPP). But they required a licence from the National Energy Regulator of South Africa (NERSA) for embedded generation projects with a capacity of more than 1 MW, and even then, they could supply only a limited amount of electricity to a single customer and not to the grid. 'This licensing requirement was described as onerous and hindered the development of the private generation energy sector' (Msimango et al., 2025).

Resistance from the Department of Mineral Resources and Energy was one factor in the tardiness to award licences.

Operation Vulindlela identified the 1 MW threshold as a key obstacle to the private sector's involvement in generating electricity and, through regulatory amendments, facilitated the lifting of this threshold to 100 MW in 2021 (Operation Vulindlela, 2022).

According to Msimango et al. (2025),

> 'The increase in the licensing threshold for embedded generation was considered a turning point to encourage private sector participation in resolving the energy crisis characterized by frequent load shedding.'

At the end of 2022, the licence requirements were lifted altogether, and Operation Vulindlela worked with NERSA to cut regulatory red tape and to speed up approvals. NERSA had previously registered only 13 projects with a total capacity of 472 MW almost a year after the threshold was officially lifted (Msimango et al., 2025).

The Operation Vulindlela team also established an energy generation task team comprising the relevant state institutions, government departments, and the private sector to address bottlenecks and to expedite project approval. Timelines for assessing the environmental impact of producers have been reduced from 100 days to 57 days (Oosthuizen, 2025). This means capacity can be added to the grid more quickly. In three years, the pipeline of confirmed private investment in renewable energy projects has increased from 4,000 MW (in March 2022) to more than 36,000 MW and continues to grow (Dicks, R., personal communication, 24 March 2026).

This 'simple' reform, says Pieterse, has not only strengthened energy security but 'you are also derisking the fiscus because private companies are building (plants) themselves, probably quicker as well.'

2.2 WATER

Water supply, like energy, is a systemic problem of some urgency for the country.

In terms of the National Water Act 36 of 1998—introduced by the first Minister of Water Affairs and Forestry in the democratic government, the late Kader Asmal—raw water was effectively nationalized during the Mandela administration. The National Water Act took away riparian rights from owners of property that rivers ran through (except for a limited amount of water in, for example, boreholes); it also distinguished between a water services authority and a water services provider.

Sean Phillips explains:

> 'The job of the Water Services Authority is to see that water services are provided according to standard. The water service provider is the body that actually delivers the service. So (for example), you can say that the City of Johannesburg is the Water Services Authority and Johannesburg Water is the water service provider.'

In many ways, the National Water Act foresaw a constitutional conundrum that allows municipalities to be 'protected' from national government intervention except in specific circumstances. If municipalities are 'water service authorities', it means any entity that is able to can be a water services provider.

The problem, though, as is manifest in cities such as Johannesburg, is that municipalities do not 'ring-fence' the revenue they get from water. This means that there is no legal obligation to use the revenue to maintain infrastructure—and in many cases, such as Johannesburg, cities do not do this. Most of the revenue goes to pay salaries.

This is a matter entwined with the reform of local government, which is on the 'to-do' list of Phase 2 of Operation Vulindlela.

A major success of Phase 1 with regards to water has been the significant reduction in the time it takes to get a water-use licence.

Water-use licences stem from the Asmal-led legislation that nationalized most raw water. However, agriculture and industry can apply for water-use licences to access large volumes of water for production processes.

Again, as in the licensing process for independent power producers, applying for a licence was often lengthy and tedious. But after the intervention of Operation Vulindlela, the Department of Water and Sanitation was able to clear a backlog of 1,000 applications and reduce the turnaround time from 300 days to 90 days (Van Reenen and Ryan, 2025).

An SA-TIED paper by Van Reenen and Ryan (2025) estimated that this relatively simple reform has contributed ZAR 56.5 billion to GDP and added about 2,500 jobs to the economy since 2022.

This was not only a bureaucratic hurdle to overcome. As Phillips explains:

> 'When you give water-use licenses [you must ensure] that the users aren't going to damage water resources or pollute water resources or negatively affect water.... So there's a lot of scientific and engineering assessment of applications.'

Agriculture is the biggest water user, followed by mines, industries, and, of course, municipalities. Forestry companies, for instance, struggled to get water-use licences so they could plant new seeds and expand forests, 'And that's a big export earner for us,' says Dicks.

Thus, delays in issuing licences can have serious detrimental effects on both the economy and the well-being of citizens.

2.3 VISA REFORM

An easier process to obtain visas is essential for both the supply of skilled labour and the tourism industry.

Research for the original growth paper found that the immigration of skilled people was essential for growth 'because of the number of unskilled people that skilled people bring into the labour market,' according to Pieterse. 'Our skilled visa system was dysfunctional, so the base was quite low and the potential upside quite high.'

A comprehensive review of the work visa system was completed, and a Points-Based System for Critical Skills Visas and General Work Visas has since been implemented to create more flexible pathways for skilled workers (Department of Home Affairs, 2024a). Further reforms also resulted in the development of a Remote Work Visa and the establishment of a Trusted Employer Scheme (Department of Home Affairs, 2024b) to create a fast-track process for major investors.

According to Saul Musker,

> 'Many people thought that it would be impossible to reform the visa system.... By working with committed reformers within the department, we were able to overhaul the system completely—and showed that even a broken institution can be fixed with the right support and a willingness to change.'

By mid-2025, after intervention by Operation Vulindlela, Home Affairs had cleared a backlog of more than 300,000 visa applications, some dating back more than a decade (Operation Vulindlela, 2025). In addition, it fast-tracked tourist visas for more than 100,000 tourists, including from new source markets like India and China and instituted an online visa application system that allows applicants to apply online and receive a visa in real time. The department is extending this electronic travel authorization (ETA) to more visitors next year.

3. THE SECOND PHASE

Phase 2 of Operation Vulindlela was launched last year. Much of it is built on some of the successes of the first phase, but it also singled out new priorities.

Among these were:

- securing the energy supply and completing the restructuring of Eskom,
- transforming ports and rail to boost exports,
- ensuring a reliable supply of safe drinking water,
- creating 'dynamic and integrated cities',
- improving internet access and data exchange for citizens and government, and
- finalizing the visa reform programme.

3.1 CITIES AND MUNICIPALITIES

One of the key challenges in cities is persistent spatial inequality. People live far from their places of work, and the concomitant transport costs are particularly burdensome for much of the urban population. One estimate, by economist Andrew Kerr, was that most working South Africans spend up to 40% of their income on transport. Much of that goes on expenditure on taxis because other public transport options, such as rail, were essentially dysfunctional (Kerr, 2015).

Solving spatial inequality is a longer-term option than improving transport networks.

'This doesn't mean that [the Cape Town mayor] should give up on the idea of social housing in the CBD. But the problem is he's constrained ... he doesn't have the sites, and he's going to struggle with the capital, and so the best investment we can make is just making sure that we can move people in a cost-effective and highly effective manner,' says Pieterse.

So, to ease the effects of spatial inequality, Operation Vulindlela is focusing on (re)creating a functioning metro rail system that moves 450 million passengers a year in the big cities and with a train every five minutes in peak hours. This envisaged passenger load would be slightly above what it was before COVID-19—but much more than it is currently. After COVID-19, it dropped to 50–70 million passenger trips a year.

A factory in Nigel, Gauteng, produces 30–60 world class train sets, with 6 carriages per set, a year. But the metro lines are constrained by inadequate signalling capacity. This year, Passenger Rail Agency of South Africa (PRASA) has been allocated an additional ZAR 23.1 billion (over the Medium-Term Expenditure Framework (MTEF)) in the National Budget to upgrade telecommunications and signalling systems, making it one of the country's biggest capital projects, according to Pieterse.

The budget will also go towards securing the lines, he says. In Cape Town, until a few years ago, informal settlements sprang up on some of the train lines, making the system even more dysfunctional. Those settlements have now mostly been removed, but the signalling infrastructure is so dilapidated that even though commuters will now see new trains, they will only see one every half an hour. According to Pieterse,

> 'If you go to São Paulo, if you go to any of these big cities, you see what a functioning commuter rail infrastructure actually does to unlock growth and to bring down the cost of living.'

3.2 LOGISTICS

In the logistics sector, Operation Vulindlela reforms have resulted in the adoption, in December 2023, of the Freight Logistics Roadmap outlining a clear path for reform of the logistics system (Government of South Africa, 2023). An important milestone has been the publication of a Network Statement in December 2024 for the freight rail network to enable third-party access for private rail operators (Department of Transport, 2024). For the first time, private sector participation was also introduced at the Port of Durban, the largest container terminal on the continent. The National Logistics Crisis Committee (NLCC) in partnership with the private sector is working towards improving rail and port volumes and efficiency, as well as implementing the Freight Logistics Roadmap.

3.3 WATER

Water, as discussed above, is another critical function that needs fixing. Phillips says a massive 73% of municipalities are 'in a poor or critical state when it comes to their water function.'

And it is getting worse. According to Phillips,

> 'The whole fiscal model is that water is supposed to be financially self-sustaining, like electricity. So there are infrastructure grants to address backlogs that go to municipalities, and municipalities are supposed to use a portion of their equitable share to fund the provision of free basic water to the indigent.... Treasury doesn't give any grants to municipalities apart from that equitable share for them to fund operation and maintenance of water services.'

Arguably, one obstacle is a constitutional one. Section 139 of the South African Constitution stipulates that only the relevant provincial executive may intervene if a municipality does not fulfil its legal obligations—and there are time limits to that intervention.

But the issue of not ring-fencing water revenue for infrastructural maintenance is a pressing one. Currently, there is an amendment to the Water Services Act 108 of 1997 before Parliament—the Water Services Amendment Bill (B24-2025)—which, if passed, will give national government more capacity to intervene in municipalities to regulate water revenue management.

This forms one of Operation Vulindlela’s priorities in its next phase. The City of Johannesburg, for instance, estimates in its 2025/26 to 2027/28 Medium-Term Budget that it will collect ZAR 11.9 billion in revenue for water. But it will spend only ZAR 1.3 billion on water infrastructure (City of Johannesburg, 2025).

3.4 LOCAL GOVERNMENT

The water crisis, says Phillips, is a symptom of the crisis that afflicts almost two thirds of local governments in the country.

According to the 2026 Budget Review, the situation is dire: 29 municipalities are under mandatory financial recovery plans, 88 have unfunded budgets ‘and limited capacity’ to maintain infrastructure (National Treasury, 2026). Furthermore,

> ‘The key factors in municipal financial instability are weak revenue collection, poor credit control and lack of financial discipline. Rising electricity and water input costs intensify financial pressures, but the accumulation of arrears largely reflects failures to bill accurately, collect revenue consistently, and ring-fence and remit collections for bulk services.’

The National Treasury has announced a ‘decisive shift to active structural intervention to reverse poor performance in provinces and municipalities’ (2026).

In keeping with the character of Operation Vulindlela, according to Dicks, it will focus on addressing the structural causes of local government dysfunction—including an overhaul of the current two-tier system, stronger regulation and oversight of service delivery, and a review of the local government funding model.

A new Draft White Paper on Local Government is on the table to forge a path for intervention (Department of Cooperative Governance, 2026). As Dicks says:

> ‘What do you do when you can see Rome's burning away there.... How do you make sure that you can intervene much earlier on?’

Therefore, reform of local government will be high on Operation Vulindlela’s agenda in the next period.

3.5 DIGITAL TRANSFORMATION

Reducing South Africa's high cost of data has been a key focus for Operation Vulindlela, as has building an official digital database to improve governance and combat corruption.

The reforms in telecommunications have brought down the costs of data from ZAR 149 for 2 GB of data to ZAR 99. The migration from analogue to digital, long overdue, is finally underway.

A key component of digital transformation has been enabling the integration of databases to improve information flow between government and citizens and within government.

Called MzansiXchange [1],, it allows for the real-time exchange of data for verification purposes and, most importantly, to protect government against fraud. Operation Vulindlela aims to ensure that citizens must provide their information to government only once—not to fill in manual forms for each new application or service.

Take, for instance, the applications to the South African Social Security Agency (SASSA) for the COVID-19 Social Relief of Distress (SRD) grants. Currently, SASSA sends a batch of applicants' data to Home Affairs to check whether they are South African citizens. Then it asks the banks to check the intended beneficiaries' bank accounts to see if they are eligible. 'The problem is they send batches in a very inefficient way,' says Pieterse—every month or every quarter.

MzanziXchange, on the other hand, allows SASSA to send data and verify applicants 'almost in real time'. SASSA can evaluate applicants for social grants against a national population database, against the Central Supplier Database (CSD) (to determine if they are doing business with government), and with banks to check that applicants are eligible.

Likewise, if someone bids for a contract with government, MzansiXchange can check almost immediately if the aspirant contractor is on the government's Personnel and Salary (PERSAL) system—in other words, if they are a state employee. If so, the individual should not be doing business with the government.

The prevention of potential fraud in the social grants system has been notable. SASSA gets about 17 million applications a year for the SRD grant. Astonishingly, only about 7–8 million of those are approved once SASSA has checked would-be beneficiaries' bank accounts, according to Pieterse.

Last year, the National Treasury asked the Social Development cluster to ensure more application verifications for all social grants—not just the SRDs. On average, initial estimates indicate that about 10% of those who apply for the range of grants—child support, pension, or disability—do not qualify. 'We spend ZAR 286 billion in social grants a year,' says Pieterse. 'Now if 10% of ZAR 286 billion is paid to fraudulent beneficiaries, that is a huge fiscal leakage.'

South Africa's Digital Transformation Roadmap (Government of South Africa, 2025), which was developed by Operation Vulindlela and approved by Cabinet in 2025, includes the

[1] *Available at: https://mzansixchange.treasury.gov.za/.*

introduction of a digital identity system as well as rapid, low-cost payments to expand financial inclusion (Operation Vulindlela, 2025).

Operation Vulindlela is also driving a new end-to-end e-procurement system in government to improve integrity in the system by digitizing all steps of government procurement. It will cost about ZAR 150 million, but as Pieterse points out, out of a budget of ZAR 2 trillion, ‘it’s a very small investment to make for the kind of outcomes we are trying to get.’

4. CONCLUSION

Operation Vulindlela has notched up some notable successes, key among them being improving the electricity supply pipeline, making data more affordable, reforming the visa system, and the water-use licence system. All are intended to promote economic growth and create new jobs.

In a sense, Operation Vulindlela’s success will be measured when it is no longer necessary. Its leaders believe it should work itself out of a job. As government improves its ability to implement reforms, it can be wound down.

In the Foreword to the 2026 Budget Review, Pieterse writes, ‘Determined action has put the country’s public finances on a sustainable footing.... The outlook for economic growth is improving as reforms gather pace. Our public finances are emerging from the fiscal wilderness.’

For the Operation Vulindlela team, it has often involved going toe-to-toe with incumbent politicians or public officials. It helps that both the President and Minister of Finance are driving the reforms. The Minister of Mineral and Petroleum Resources, Gwede Mantashe, once said publicly, in relation to the proposed Eskom restructuring, that the President had ‘twisted his arm’.(https://www.news24.com/southafrica/news/twisting-mantashes-arm-operation-vulindlela-drove-raising-embedded-energy-threshold-to-100mw-20210611)

Afterwards, a team member joked that there must be ‘a number of twisted-off arms in Rudi’s office’. But while there may be pain, the fact that a focused team has been able to cut through the obstacles in the priority areas has, so far, mainly spelled progress.

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NOTES

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