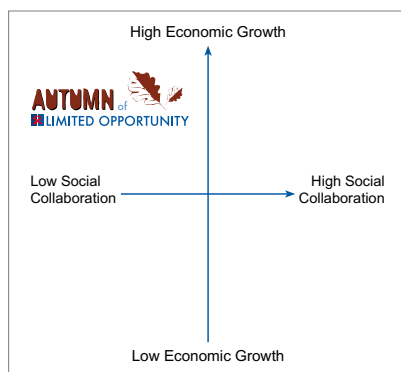


# Autumn of Limited Opportunity

## High economic growth / low social collaboration

The season *autumn* has been used in the name of the scenario as it visually captures the essence of the scenario: in autumn the trees continue to grow taller, while the leaves die and are shed. In this scenario, sectors of the economy continue to grow and thrive, while other parts shrivel.

The *Autumn of Limited Opportunity* looks at what our society and economy could look like in 2025 if all the role players (government, business, labour, communities and individuals) take, or fail to take, certain actions.



## Key characteristics

- Leadership driven by growth
- Exclusive partnerships
- Significant income differentials
- Treatment and care is available, prevention is lacking
- Little behaviour change
- Gender inequality and sexual violence
- AIDS response intellectualised
- Limited acceptance of HIV positive people

## The focus

In the *Autumn of Limited Opportunity* the focus is on treatment and support to those who can afford it. The response to HIV is very much intellectualised and little benefit trickles down to those in need. Leadership is often self-serving and corrupt with the wealth and resultant power concentrated in a relatively small pocket of society. Exclusive partnerships are formed with strong individual agendas to address HIV and AIDS. Society is profit-driven with little focus on the spread of wealth.

Business response to the epidemic is mostly profit-driven due to the reduction in HIV-related costs that come with an HIV workplace programme. Initiatives in the community are limited to urban areas and corporate social investment funding cycles are short. Civil society response under this Autumn scenario where there is high GDP growth and low social collaboration is limited. Donor programmes are short-sighted and work in isolation.

## Individual behaviour

Awareness of HIV is quite high in the relatively wealthy first economy leading to a third of South Africans knowing their HIV status. Sexual violence is prevalent, and gender inequalities remain. There is limited acceptance of people with HIV and AIDS. More than 70% of the youth and around 40% of adults use condoms consistently. Those not in a long-term relationship change partners very frequently and risky sexual behaviour still remains a huge obstacle in the response to the epidemic.

## The new society

This is a society with high economic growth that is very unevenly spread leading to a high increase in income inequality. Some provinces show a high GDP per capita and others remain at very low levels. The Human Development Index (HDI) differs widely between the first and the second economy. The HDI remains high in the first economy with good quality education and high life expectancy for those who can afford a good standard of living. Rural households and households in the second economy are severely affected by HIV and AIDS. Income reduction, increased borrowing, the sale of productive assets, illiteracy and malnutrition result in low GDP per capita, poor education and low life expectancy. The average person in the Autumn scenario is expected to live to age 55 by 2025.

Business concentrates on capital-intensive industries and contract work becomes popular. The skills shortage worsens with the strong economic growth and skills are imported due to the lack of adequate skills development by the local education system. There is a booming market in the first economy with insurance remaining expensive but innovative.

## What does the HIV epidemic look like by 2025?

The total number of people infected with HIV in 2025 will have reduced to 4.2 million from the current estimates of 5 million. The estimated HIV prevalence rate for those between 20 and 64 will reduce to 13% from the current estimated 19%. A total of 530 000 South Africans will be in the final stages of the disease and in need of antiretroviral treatment. AIDS deaths per annum would have reduced to around 303 000.

