



## Built to deliver

How African governments can  
modernise public services and  
build future-ready infrastructure

November 2025

# Introduction

Across Africa, governments are under pressure to deliver more with limited resources, ageing systems and critical skills gaps. Service delivery and infrastructure performance have not kept pace with the continent's growth ambitions. These constraints continue to strain public finances and erode citizen confidence.

Deloitte Africa's *Government Trends 2025* highlights two areas that are pivotal for Africa's progress: modernising public services and building infrastructure that is future-ready, on time and on budget.

In Africa, these two priorities are inseparable, and often at the source of political tension and social distress. The efficiency of public services depends on the resilience of the infrastructure that enables them, from digital networks and transport corridors to hospitals, schools and data systems. In many countries, legacy systems, fiscal constraints and governance complexity have often slowed the continent's progress.

A report launched by AUDA-NEPAD in early 2025 estimates Africa's infrastructure needs are between US\$130–170 billion per year<sup>1</sup>, with a significant funding gap between demand and current investment.

Faced with the scale of this deficit, the opportunity now is to reimagine how African governments deliver, using digital transformation, new partnership models and blended finance to close the

infrastructure and service delivery gaps that hinder growth and trust, and turn these ambitions into action and tangible benefits for citizens.



## Why a resilient public service matters

Africa's governments face a convergence of pressures that make economic development and job creation urgent. Slower economic growth, constrained fiscal space, and rising public expectations are testing the limits of public institutions. At the same time, technology, demographics and climate change are reshaping what citizens expect from their leaders and how services are delivered. In this environment, efficiency alone is no longer enough. Governments must become agile, digitally enabled, and capable of delivering measurable impact at scale.

Public service modernisation and infrastructure renewal are central to that ambition. Without them, citizens lose confidence, investment declines, and inequality deepens. But with the right systems, skills and partnerships, governments can unlock a powerful multiplier effect, equating to faster delivery, greater accountability and renewed public trust.

For Africa, where the dividends of reform are both social and economic, the question is no longer if governments should modernise, but *how quickly* they can do so.

<sup>1</sup> AUDA-NEPAD, New Report calls for unlocking \$170 billion annually to meet Africa's infrastructure needs, February 2025, <https://www.nepad.org/news/new-report-calls-unlocking-170-billion-annually-meet-africas-infrastructure-needs>





## Trend 1: Modernising public service through digitalisation

“ Building stronger systems, designed to withstand pressure and adapt over time, is the only way to protect citizens and enhance their quality of life.



There is an African adage that says you cannot carry water in a cracked pot for long. No matter how carefully you try, the water seeps away before it reaches its destination. The same is true of public service delivery. Temporary fixes may slow leaks, but they don't solve the problem. Without addressing the underlying cracks, outdated systems, limited skills and fragmented accountability, the effort poured in will never reach the citizens it is meant to serve.

Modernisation is how governments repair the pot itself. Building stronger systems, designed to withstand pressure and adapt over time, is the only way to protect citizens and enhance their quality of life.

Public service modernisation is critical to a country's stability, growth, competitiveness and effective service delivery. Citizens have come to expect government interactions to be as seamless as the private-sector experiences they enjoy daily. Despite living in a digital age, many public services across the continent remain paper-based, fragmented and slow. Legacy systems, often built decades ago without maintenance and upgrades, cannot easily share data or scale to meet today's demands. It makes it an ideal hunting ground for bad actors who are intent on fraud, theft, and other corrupt

activities, ingraining it into the system and culture of the public service.

Citizens expect better service delivery, but disconnected systems make that impossible. The result is friction, dissatisfaction and high public service costs. Unfortunately, citizens across the continent are accustomed to a public service experience that is based on repeated form-filling, inconsistent data, lost records, long queues for routine services such as driver's licences, social grants or health records, and slow responses to requests to resolve water, sanitation and electrical service delivery or billing enquiries.

Modernisation is about more than technology. It is about creating an integrated, trusted and citizen-centred public service that blends digital and physical channels, reduces cost, and restores faith in public institutions. In South Africa, the Government's *Digital Transformation Roadmap 2025* sets a clear vision for this future, one where technology is used to improve service quality, enhance transparency, and expand access for all citizens<sup>2</sup>. The roadmap outlines priorities, such as establishing a whole-of-government digital platform, strengthening cybersecurity, and building digital capabilities across the public sector workforce.

However, implementation remains uneven across departments, agencies and state-owned entities, and many departments still face resource and skills gaps that limit progress. Accelerating this roadmap through practical capacity building, stronger governance and measurable citizen outcomes is essential to turn strategy into sustained delivery.

The South African Revenue Service's (SARS) VAT modernisation programme<sup>3</sup> is often cited as a success. Highlighting digital modernisation through digital filing, real-time data analytics and automation, SARS significantly reduced turnaround times and improved revenue efficiency, showing what can be achieved when leadership, systems and skills align.

In contrast, initiatives such as the Home Affairs modernisation programme<sup>4</sup> and aspects of the e-tolling system have faced delays, cost overruns and interoperability issues, undermining public confidence and costing taxpayers millions. These contrasting outcomes highlight that while South Africa has a national digital transformation roadmap, execution capacity and cross-agency coordination remain the defining challenges of modernisation.

<sup>2</sup> South Africa's Roadmap For The Digital Transformation Of Government 2025, [https://www.gov.za/sites/default/files/gcis\\_document/202505/south-africas-roadmap-digital-transformation-government.pdf](https://www.gov.za/sites/default/files/gcis_document/202505/south-africas-roadmap-digital-transformation-government.pdf)

<sup>3</sup> What is SARS' next digital transformation move?, Deloitte, January 2023, <https://www.deloitte.com/za/en/services/tax/perspectives/what-is-sars-next-digital-transformation-move.html>

<sup>4</sup> The system is down — Behind Home Affairs' IT downtime problem, my Broadband, June 2025, <https://mybroadband.co.za/news/government/599100-the-system-is-down-behind-home-affairs-it-downtime-problem.html>

# Bridging the digital divide

Africa's digital infrastructure gap remains wide. While access to entry-level smartphones has improved, reliable and affordable connectivity remains the greater challenge.

In South Africa, broadband coverage is still uneven, particularly in rural areas where network infrastructure is limited. According to the Independent Communications Authority of South Africa (ICASA), only 79% of South African households have access to the internet, and just 11% enjoy fixed broadband connectivity<sup>5</sup>. Mobile broadband remains the main form of access, yet data costs continue to place a heavy burden on low-income households.

Many South Africans are faced with difficult trade-offs, choosing between buying data and meeting basic needs.

Average mobile data prices increased by



**4.3%** in 2024

affecting digital inclusion in rural areas

Modernisation efforts must therefore balance innovation with inclusion, extending reliable, affordable access while ensuring that digital transformation benefits all citizens, and not only the connected few. Governments can learn from initiatives such as the UAE's "digital by design" approach and Abu Dhabi's integrated citizen platform, TAMM.

The system consolidates more than



**700** government services

from over 30 departments into a single digital interface, allowing citizens and businesses to complete transactions such as licence renewals, payments, and permits through one unified portal. Built on shared data infrastructure and strong interdepartmental collaboration, TAMM demonstrates what can be achieved when user experience, technology, and governance design align<sup>6</sup>.

Africa's digital transformation journey, however, must reflect its own realities, which include diverse languages and

cultures, uneven connectivity, and varying levels of digital literacy and institutional maturity. The opportunity for the continent lies in adapting lessons from pioneers like Abu Dhabi to build systems that are fit for the local context, focusing on accessibility, inclusion and trust as the cornerstones of digital government modernisation.

Modernisation requires a mindset shift, not just a system upgrade. Digital transformation creates an opportunity to deepen how government understands and serves citizens, putting their needs, experiences and expectations at the centre of delivery. As citizen activism grows and service expectations rise, the demand for visible, measurable improvements is intensifying. In South Africa, the Department of Home Affairs' current efforts to reduce visa backlogs and improve service turnaround times demonstrate the scale and complexity of modernising frontline services<sup>7</sup>.

Deloitte has supported the department by providing specialist resources to help address the backlog, ensuring continuity of operations while government advances its broader digital transformation plans.

<sup>5</sup> Independent Communications Authority of South Africa's (ICASA) 2025 State of the ICT Sector Report, March 2025, <https://www.icasa.org.za/uploads/files/The-State-of-the-ICT-Sector-Report-of-South-Africa-2025.pdf>

<sup>6</sup> Deloitte Government Trends 2025, <https://www.deloitte.com/us/en/insights/industry/government-public-sector-services/government-trends.html>

<sup>7</sup> Home Affairs working at speed to reduce queues and visa backlog, Moneyweb, June 2024, <https://www.moneyweb.co.za/moneyweb-podcasts/moneyweb-midday/home-affairs-working-at-speed-to-reduce-queues-and-visa-backlog/>



# Inclusive design

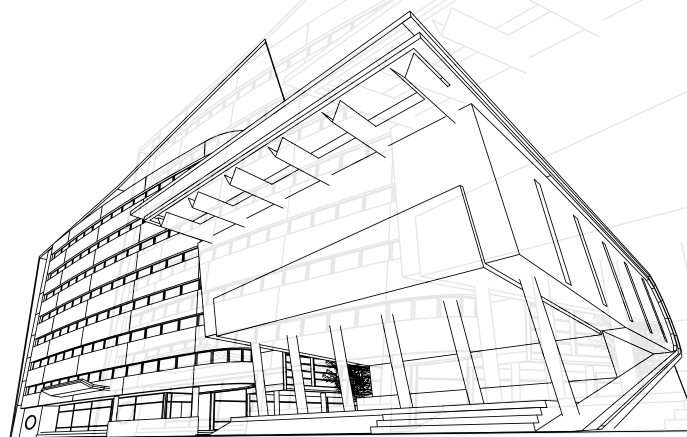
Public service modernisation must ensure no citizen is left behind. Services should be accessible in multiple languages, designed for mobile rather than desktop use, and supported by both digital and physical service points that meet citizens where they are. For many older or rural citizens, physical service points remain essential, but access to them can involve long and costly travel.

Modernisation, therefore, includes finding ways to bring services closer to people, whether through mobile outreach units, community access centres, or virtual delivery options such as online licence renewals or telehealth consultations that reduce the need to travel.

In contexts where connectivity remains limited or unaffordable, governments can also extend reach through non-internet-dependent channels such as USSD and SMS-based services, which enable citizens to access essential information or complete basic transactions using any mobile device. These hybrid approaches, which combine digital and low-tech solutions, are key to building a truly inclusive and equitable public service.

Governments around the world are using citizen experience (CX) analytics, sentiment data, and behavioural-insight tools to track and respond to pain points in real time. These tools help public institutions understand where services are failing, what citizens value most, and how to prioritise interventions based on evidence rather than assumptions.

For South Africa, adopting similar data-driven feedback mechanisms could transform how departments and agencies monitor service quality and rebuild trust. Real-time citizen insights would allow leaders to identify systemic issues earlier, allocate resources more effectively, and demonstrate responsiveness, all key steps toward strengthening confidence in public institutions.





Three priorities can help build inclusive modernisation:

1.

Design for all



Embed universal-access and plain-language principles in every new system so that services are simple, intuitive and available in multiple languages. South Africa's Department of Basic Education online admissions portal, for example, has shown the value of designing platforms that are mobile-friendly and accessible in all official languages, though scaling this approach across departments remains a key opportunity.

2.

Strengthen digital literacy



Expand community-based training and partnerships with schools and broadcasters to build basic digital skills. Public platforms such as the SABC's public service and vernacular radio stations can play a critical role in reaching remote communities and older citizens who are less likely to be online.

3.

Communicate transparently



Publish progress metrics and service performance data so that citizens can see how their feedback leads to visible improvements and greater accountability. For example, the City of Cape Town's open data portal and National Treasury's "Know Your Budget" platform are steps toward greater transparency that could be replicated more widely across the public sector to strengthen trust and citizen engagement.



# Emerging technologies shaping the future of public service

Artificial intelligence (AI), predictive analytics and digital identity systems are transforming how governments deliver. In Cape Town, AI is being used to detect water-system leaks and manage consumption.

In Tshwane, data analytics is improving billing accuracy. South Africa's progress in developing a national digital identity framework, as outlined in the Government's *Digital Transformation Roadmap*<sup>8</sup>, is another important step in this journey. Collaboration between the Department of Home Affairs, the South African Reserve Bank, SARS and the Council for Scientific and Industrial Research (CSIR) is laying the foundation for a secure, interoperable digital identity system that can simplify service access, strengthen data integrity and reduce fraud.

This direction is consistent with leading global practices such as India's Aadhaar programme, where a single digital identity has enabled millions of citizens to access services more efficiently and transparently. Such initiatives demonstrate the power of technology to solve real operational problems. Recognising and accelerating this progress will be critical to achieving a truly integrated, citizen-centred public sector.

Deloitte's global experience shows that successful governments invest early in AI fluency, cross-agency data governance, and clear measurement of mission impact. These capabilities not only enable responsible use of emerging technologies but also lay the foundation for digital trust. Deloitte's Trustworthy AI™ framework<sup>9</sup> provides a practical blueprint for achieving this balance, integrating principles of fairness, transparency, accountability, robustness and privacy into every stage of AI design and deployment.

Embedding such frameworks within government systems can help ensure that innovation advances hand in hand with ethics, security and public confidence.

Just as modernisation depends on digital and institutional infrastructure, economic growth depends on the physical and financial systems that sustain it.

<sup>8</sup> South Africa's Roadmap For The Digital Transformation Of Government 2025, [https://www.gov.za/sites/default/files/gcis\\_document/202505/south-africas-roadmap-digital-transformation-government.pdf](https://www.gov.za/sites/default/files/gcis_document/202505/south-africas-roadmap-digital-transformation-government.pdf)

<sup>9</sup> Deloitte Trustworthy AI framework, <https://www.deloitte.com/us/en/what-we-do/capabilities/applied-artificial-intelligence/articles/trustworthy-ethical-ai-thought-leadership.html>



## Trend 2: Delivering future-ready infrastructure on time and on budget

“Infrastructure remains the backbone of economic and social development. Too many projects in Africa still run over budget or never reach completion.”



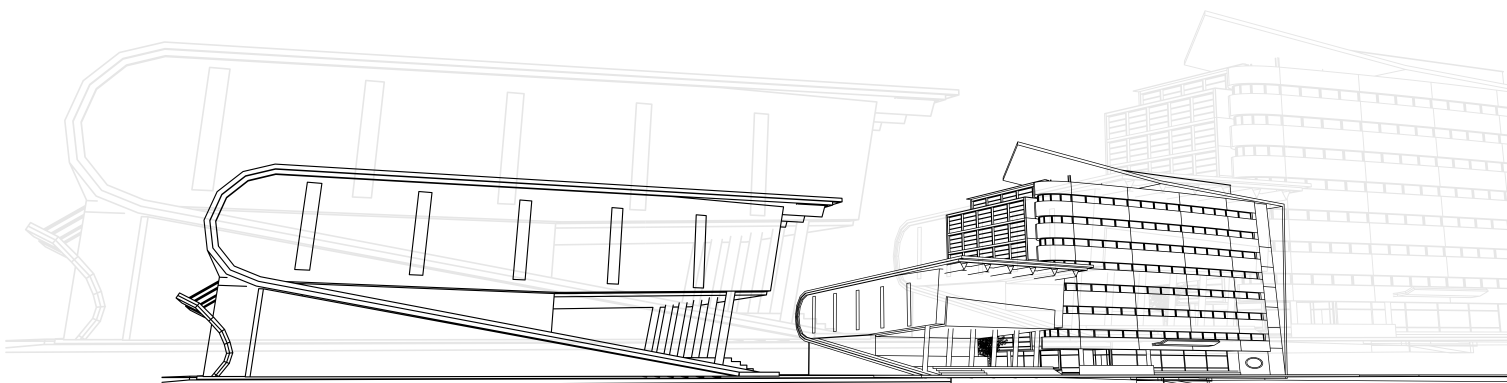
According to the B20 South Africa Finance & Infrastructure Task Force<sup>10</sup>, nine out of 10 African infrastructure projects fail to move from initial sourcing to financial close.

This alarming failure rate is indicative of systemic challenges in project preparation, coordination and funding. For governments, it means billions in planning expenditure with little return and escalating fiscal pressure as projects stall before delivery.

For citizens, it translates into delayed access to essential services, from reliable energy and transport to clean water and housing, and a decline in the quality and consistency of service delivery.

From an investor perspective, persistent project delays undermine confidence in the public sector's ability to execute, increasing perceived risk and raising the cost of capital.

Ultimately, each uncompleted project represents a missed opportunity for growth, jobs and trust, reinforcing why delivery capability has become the defining test of government performance.



<sup>10</sup> B20 South Africa (2025). Finance & Infrastructure Digital report, [https://www.b20southafrica.org/wp-content/uploads/2025/09/B20\\_Finance\\_Infrastructure\\_Digital-Version.pdf](https://www.b20southafrica.org/wp-content/uploads/2025/09/B20_Finance_Infrastructure_Digital-Version.pdf)



# Moving from fragmented planning to systemic delivery

Being future-ready means more than building assets. It means designing infrastructure that is resilient, digital and sustainable from the outset. For example, we need to embed climate resilience in cities and housing developments at the start, not retrofit it after the fact, especially in environmentally disaster-prone areas.

Key elements include:



**Climate-resilient** design that anticipates droughts, floods and energy shocks



**Digital-twin modelling** to test scenarios and optimise maintenance before physical construction begins



**Systemic integration** across national, provincial and municipal projects to avoid duplication and maximise value.

To enhance infrastructure delivery in South Africa, progress is being made to strengthen the policy environment for investment. The National Treasury's recent amendments to Public-Private Partnership Regulation 16 under the PFMA, and the corresponding Municipal Regulation 309 under the MFMA, are important steps toward encouraging greater private-sector participation in infrastructure development. These reforms aim to simplify approval processes, improve transparency and accelerate project preparation.

The B20 Finance & Infrastructure Task Force also recommends establishing national and regional platforms that align project pipelines and financing, helping governments and investors collaborate more effectively to close the infrastructure gap.

The success of Africa50<sup>11</sup>, a pan-African infrastructure platform launched by the African Development Bank and 30 countries, illustrates what is possible: over US\$ 8 billion in total project value and 25 projects across energy, transport and digital sectors.

Deloitte advocates similar platform approaches for South Africa, including integrated digital dashboards, transparent permitting trackers and programmatic public-

private partnerships that align across government spheres.

In July 2025, Deloitte hosted a Public and Private Partnership Seminar with National Treasury, development finance institutions (DFIs), the Water Partnership Office, and a range of private-sector and development partners to explore solutions to South Africa's water and sanitation challenges. The discussions underscored that access to safe and clean drinking water is not only a fundamental human right but also a prerequisite for economic and social resilience. Panellists highlighted the need for accelerated project preparation, blended-finance mechanisms, and improved risk allocation frameworks to attract private capital into the sector.

They also emphasised the importance of technical capacity building at the municipal level and collaboration across all spheres of government to ensure sustainable delivery. These insights reinforced the value of partnership-driven approaches that bring together public institutions, financiers, and operators to unlock infrastructure delivery at scale<sup>12</sup>.

<sup>11</sup> Africa50 Annual Report (2023), <https://www.africa50.com>

<sup>12</sup> Deloitte Public and Private Partnership Seminar – Water sector, July 2025, <https://www.deloitte.com/za/en/Industries/government-public/perspectives/public-and-private-partnership-seminar.html>

# Infrastructure as an ecosystem of talent

Infrastructure delivery is as much a people challenge as it is an engineering or financial one. South Africa continues to face acute skills shortages of project managers, infrastructure planners and maintenance specialists, particularly at the municipal level. The Auditor-General of South Africa (AGSA) notes that persistent weaknesses in project execution, poor contract management and inadequate technical capacity continue to undermine value for money in public investment<sup>13</sup>. The AGSA reported similar findings at local-government level, which highlights limited engineering and financial skills as key constraints to service delivery<sup>14</sup>.

To deliver sustainably, we must invest as much in people as in projects. Strengthening South Africa's technical capacity, especially at local government level, requires closer collaboration between the public and private sectors to align training, funding and knowledge transfer.

By partnering on joint skills-development initiatives, both sectors can accelerate the pipeline of qualified engineers, project managers and infrastructure planners needed to execute and maintain capital projects effectively.

Lessons from global initiatives, such as Germany's modular vocational training<sup>15</sup> and India's skill-development academies<sup>16</sup> demonstrate the value of shared investment in workforce development. Deloitte's Future of Infrastructure learning programmes<sup>17</sup> offer a similar model, showing how integrated training in project finance, risk management and ESG standards can build capability within public institutions and state-owned entities, while encouraging collaboration with the private sector to strengthen delivery capacity where it matters most.



<sup>13</sup> Auditor-General of South Africa's PFMA 2023/24 Infrastructure Management Report, <https://pfma-2023-24.agsareports.co.za/pages/infrastructure-management>

<sup>14</sup> Consolidated General Report On Local Government Audit Outcomes 2023-2024, pages 62-67, [https://www.agsa.co.za/Portals/0/Reports/MFMA/2023-24/MFMA%20Report%202023-24%20interactive%20\(updated%20August%202025\).pdf](https://www.agsa.co.za/Portals/0/Reports/MFMA/2023-24/MFMA%20Report%202023-24%20interactive%20(updated%20August%202025).pdf)

<sup>15</sup> Federal Institute for Vocational Education and Training (BIBB), The German VET System, <https://www.bibb.de/en/>

<sup>16</sup> National Skill Development Corporation (NSDC), <https://nsdcindia.org>

<sup>17</sup> Deloitte Global, "The Future of Infrastructure: Building Better for 2030", <https://www.deloitte.com/us/en/insights/industry/government-public-sector-services/future-of-infrastructure.html>



# Mobilising capital through new partnership models

Africa's infrastructure ambitions cannot be met through public funding alone. Fiscal constraints, limited project-preparation capacity and uneven regulatory environments continue to slow progress and increase delivery risk. The B20 South Africa Finance & Infrastructure Task Force (2025)<sup>18</sup>, on which Deloitte served as a knowledge partner, identifies three interconnected priorities for unlocking investment, namely:



Expanding investable project pipelines



Improving access to capital



De-risking projects through blended finance and partnership models

One of the most promising approaches is the rise of Public-Private-Philanthropic Partnerships (PPPPs), innovative collaborations that blend commercial, developmental and social objectives.

These models are gaining traction as bilateral governments, including the United States, shift from traditional aid toward partnership-based investment in Africa, creating greater opportunities for blended-finance mechanisms. For South Africa, this opens the door for projects that combine public guarantees, philanthropic first-loss capital and private-sector efficiency to unlock delivery at scale.

National reforms such as the amendments to PPP Regulation 16 under the PFMA and Municipal Regulation 309 under the MFMA demonstrate the government's commitment to encouraging private-sector participation. Strengthening project-preparation facilities, improving transparency, and streamlining approvals will be key to attracting both local and international capital. In February 2025, Deloitte convened a Public-Private-Philanthropic Partnership Roundtable<sup>19</sup> with the National Treasury, DFIs, and private investors to explore these opportunities in practice, reinforcing the importance of collaboration and financial innovation to close Africa's infrastructure gap.



**A call to build to  
deliver, together**

The path to building modernised public services and future-ready infrastructure is neither short nor simple. It requires political will, institutional capability and consistent partnership between government, business and citizens. However, progress is possible. When governments embrace innovation, align stakeholders and focus on measurable delivery, transformation and growth follow. The lesson of the leaky pot is poignant: patching cracks may hold for a moment, but only a full repair ensures that every drop of effort reaches its destination. Modernisation means strengthening the vessel itself, fixing the underlying weaknesses in systems, skills and accountability so that progress can endure.

Africa's development story will not be written in boardrooms or policy papers. It will be written in the everyday experiences of citizens. When a birth certificate takes minutes instead of months, when clean water flows reliably, and when roads and networks connect communities to opportunity. That is what it means to deliver.

<sup>18</sup> B20 South Africa (2025). Finance & Infrastructure Digital report, [https://www.b20southafrica.org/wp-content/uploads/2025/09/B20\\_Finance\\_Infrastructure\\_Digital-Version.pdf](https://www.b20southafrica.org/wp-content/uploads/2025/09/B20_Finance_Infrastructure_Digital-Version.pdf)

<sup>19</sup> The promise of private-public partnerships, February 2025, <https://www.deloitte.com/za/en/services/tax/perspectives/the-promise-of-private-public-partnerships.html>

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