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Two years into South Africa's Just Energy Transition Partnership: How real is the deal?

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Summary

At the UN climate conference in 2021, President Ramaphosa launched the *Just Energy Transition Partnership (JETP),* a first-ever, internationally applauded decarbonisation programme to which four countries of the Group of Seven and the European Union committed a substantial amount of concessional climate finance.

For South Africa the deal offered a way out of a paralysing electricity crisis, allowing it to speed up replacing its ageing, costly coal-fired power stations with ever-cheaper green alternatives. Internationally, the JETP presents an excellent pilot of how a green transition could take place in a middle-income country with green industrialisation ambitions.

Two years into the partnership, what has been achieved and where is it going? At a superficial glance, there is reason for gloom. South Africa has only closed one coal-fired power station and even considers delaying the closure of five more power stations by 2032, as originally announced. South African ministers and civil society have criticised the deal as too modest in its promise, too slow in its implementation and too little spent by donors.

However, a closer look at the energy sector, which is traditionally prone to incumbent power and rent capture, is revealing. Overcoming a chronic electricity crisis while overhauling a coal-dependent energy system and greening the economy in a just way is complex, messy and politically challenging. Moreover, all this is playing out in a low-growth, high-inequality, middle-income economy and in a young constitutional democracy. Set against this broader canvas, the answer to the question about JETP's progress and its potential is more nuanced.

A remarkable partnership

South Africa's JETP is remarkable in many ways. It is the first country-owned climate finance deal of such magnitude.[1] South Africa as a middle-income, industrialised economy is heavily coal dependent and pollutes above its weight. With more than 80% of electricity produced by fifteen coal-fired power stations, it ranks fourteenth in the world's list of carbon dioxide emitters. This coal dependency costs lives, contributes to global warming and threatens future international trade and competitiveness.

So the government's decision in 2021 to speed up the closure of almost all of its coal-fired power plants by 2050 was big news on the global climate scene. Built in the sixties and seventies, these plants were nearing retirement age. They were ageing and breaking down fast, thereby creating an unprecedented electricity crisis, with severe knock-on effects on society, the economy and the politics of the ANC government and its alliance partners of the Communist Party and labour. Coal and related industries wanted to prolong the life of these coal plants, whereas reformers wanted to replace coal with ever-cheaper renewable energy.

Given the cost of this reform endeavour in a debt-constrained country, President Ramaphosa authorised preparations for a partnership with five major donors around an ambitious investment plan to green South Africa's economy in exchange for substantial climate finance. These efforts resulted in a partnership with the European Union,[2] Germany, France, the UK and the US. They cooperated as the *International Partners Group,* chaired by the UK. Their offer amounted to $8.5 billion of grants, concessional loans and guarantees. This was significantly less than the total JET Investment Plan of $98 billion, which South Africa presented in November 2022.

This plan framed the $8.5 billion as “catalytic investments” that were intended to attract or leverage the bulk of the missing financing. In order to transition to a net-zero and climate-resilient economy and society, the government needed to transform three economic sectors. The bulk of the investments targeted decarbonising the electricity system. Coal-fired power stations were to be replaced with renewables and the transmission system would be repaired and expanded. Electric vehicle development and piloting a green hydrogen industry were the other important investment sectors.

For the transition to be just,[3] those victimised by it or left behind – especially in the coal province of Mpumalanga – needed compensation or other support, such as skilling and reskilling of affected workers. The investment plan paid particular attention to capacity development in municipalities; although little funding was set aside for it. This governance level is most confronted with solving a host of old problems such as poor procurement practices, increasing debt burden, failing electricity distribution, and deepening energy poverty. In addition, municipalities also face new tasks such as encouraging energy saving, generating renewable energy, and piloting social co-ownership models of green production outlets.

Since the signing of the JETP in 2021, the electricity crisis has deepened. President Ramaphosa tried to contain this crisis and led a comprehensive effort to reform the energy system by greening it and broadening the societal support base. But the crisis also energised opposing forces within and outside the ANC government who doubled down on coal. A confusing mix of obstruction, wilful neglect, vested interests, incompetence and even sabotage has delayed or blocked critical energy reforms, some of which are essential to take the JETP forward from investment plan to action.

This briefing note argues that the JETP is firmly domestically driven – and domestically contested. So far, the external partners play a modest, supportive role in the JET process. Past performance (Section 2) and the future potential of the JETP need to be assessed against the background of the devastating electricity crisis and the contested politics of resolving it while greening the energy system.

The dynamics of the JETP so far

South Africa has a long tradition of climate action and international cooperation. The JETP partly builds on that but concentrates the efforts and attention on a specific set of support areas that are elaborated in the JET Investment Plan. This Section trains attention on actions by the International Partners Group and by the South African Government after signing the investment plan in November 2022.

On the side of the donors, France and Germany were the first to transfer €600 million in concessional loans to South Africa's National Treasury. No further additional finance has been made. To explain the halting of transfers, donors point to the need for an investment pipeline; or to the difficulty of releasing resources in the absence of essential regulatory, legal and organisational reforms. For example, as part of a government bailout of the country's electricity monopolist Eskom in February 2023, this state-owned enterprise was no longer allowed to borrow. So donors could not use Eskom as a channel for concessional loans. There are ongoing conversations with the Ministry of Finance over the terms of the loans in the JET package, including potentially for Eskom.

On the grant funding, there is no consolidated disclosure yet. The Project Management Unit in the presidency is keeping track, though, of all JET-related projects in a financing register that will be made public. In the spirit of transparency, the UK held workshops with non-state actors to respond to their questions and concerns about the JETP.[4] According to one source, there are up to $85 million of grant-funded projects across the coal province of Mpumalanga and the Western Cape.[5] Anecdotal evidence suggests that some of these grants are already supporting – or about to support – policy research, pilot projects, capacity development, skills development, or reskilling and training of workers in the emerging renewable sector.

Komati is the first retired coal-fired powerstation where such projects have been jointly developed. The country's oldest coal plant has been transformed for solar energy production, though at a lower output. An experimental enterprise for containerised mini-grid solar production has been set up, as well as a training facility. In more than sixty municipalities there are initiatives to improve energy performance and localised energy production (interviews, May 2023 and media).

The government, from its side, intended to speedily translate the JET Investment Plan into an actionable implementation plan. The President established a *Project*

Management Unit high up in the presidency to facilitate this process. Its experienced officials engaged with the five donors in multiple working groups. Initially, the implementation plan was announced for early 2023, but social partners – especially the strongest labour federation and ANC ally COSATU – insisted on delaying it to allow for serious consultations. The implementation plan of the JETP has been announced for the UN climate conference at the end of 2023.

President Ramaphosa tasked his *Presidential Climate Commission* (PCC) (see Section 4) to hold in-depth public consultations early 2023 on the JET Investment Plan as inputs for the design of the implementation plan. Equipped with a strong mandate, and not constrained by bureaucratic trappings, the climate commission organised thorough, transparent and participative dialogues with civil society, organised labour, non-governmental organisations, business organisations and municipal representatives. Participants were highly critical of various aspects of the investment plan: too little, too slow, too opaque, too onerous. But overall, most stakeholders supported the fundamentals of the JET. Through such consultations, the PCC helped legitimise the investment plan as a home-grown country platform and open it for social participation.

The PCC provided its own critical appraisal of the JET Investment Plan. The commission confirmed that there were "legitimate concerns" about the investment plan, but it also struck a note of caution, calling for realism and pragmatism. Realism will be needed to properly assess and address institutional and capacity constraints in attracting and absorbing investments and concessional finance. State capabilities have to be strengthened for cooperation with the private sector on *market-making* or on growing renewable industries and jobs. Pragmatism is called for in working with the global and domestic funding environment. For the partnership to work in adaptive and nimble ways will help to "take advantage of any future changes".

For many, progress on the investment plan disappointed as it was measured against some of the core benchmarks of the JETP. Less than one-tenth of concessional finance had been spent, the President had announced delays in the closure of coal-fired power stations and the implementation plan, needed to set in motion the priority investments, had not been delivered in time as promised. Tellingly, in October 2023, the most powerful trade union in Eskom called for the suspension of the JETP, warning that it threatened 51.000 jobs in the coal and power industries.

The next sections look at the JETP through the prism of the dilapidating electricity crisis and the conflictual arena of energy system reforms. This gives a different perspective on the relevance of the JETP within the domestic political economy.

The electricity crisis and a window on green energy

The history of South Africa's electricity crisis and the origins of its renewable industry helps understand the recent openings towards greening the energy system, as well as the changes in power relations and technological innovations leading into the pathway of the JETP.

At the end of 2007, the state-owned enterprise Eskom could no longer supply electricity to businesses and households. It imposed intermittent blackouts[6] that, since, have only worsened. President Thabo Mbeki (1999-2008) admitted to the failure of not investing, in time, in additional electricity capacity. But much more was at stake. The government had failed to act on a set of comprehensive energy reforms, already agreed on by the cabinet in 1998. Among other things, these included unbundling Eskom's monopoly over production, transmission and distribution, roping in private investors to tap the country's vast renewable potential, and modernising the electricity market and pricing.

Inaction was due in part to obstruction by a powerful coal lobby around Eskom and big industrial consumers and in part to the leadership's failure to appreciate the urgency and intricate nature of such reforms. In its hundred years of existence, Eskom had expanded its power base, centralising control over dispersed public and private electricity companies. In the apartheid era, it had become a strategic,[7] effective but expensive pillar of the apartheid state, generating a surplus of cheaply priced electricity. In the democratic era of the early nineties, this surplus electricity was rolled out to service black households and deliver on the ANC's electoral promise of 'electricity for all'.

Not surprisingly, consumers, trade unions, big business, those living off the extended coal value chain (mining, transport, maintenance, coal-fired power stations), as well as key ANC factions resisted any reforms that would raise the price of electricity or that would unbundle Eskom. Until then, the parastatal had provided reliable and cheap electricity, albeit through unchecked and opaque government contracts. So many believed this fallacy and ignored the costs of inaction. Moreover, the country's biggest state-owned enterprise proved to be a generous conduit for rent capture by various ANC factions for patronage and preventing the party's broad church from disintegrating.

The country seemed hooked on coal. In December 2007 a politically weakened President Mbeki lost the ANC presidency at the party's elective conference to Jacob Zuma. Zuma, a firm believer in the virtues of party control over state-owned enterprises, became president of the country in 2009 (until 2018). As the electricity crisis worsened, it had devastating effects on the economy, on the income of the state, and gradually on Eskom's performance and reputation. Ironically, given the earlier successes of widening access to cheap electricity, the pain was felt hardest by small black entrepreneurs and the energy poor.[8]

The crisis and its effect on state revenues profoundly alarmed the powerful Minister of Finance. He tasked politically and technically savvy officials with experience in public-private cooperation to find ways to open the energy market to the private sector. The agile *Independent Power Producers Office* in the Ministry of Finance (later transferred to the Ministry of Energy) partnered with the ministers of energy, trade and industry, and environment around shared interests such as job creation, localisation, environment and green energy.

A second strategic and consequential move was to open the energy market to private producers of utility-scale green electricity. Since South Africa was hosting the UN climate conference in 2011, President Zuma was eager to receive international kudos for the innovative idea of an auction for renewable energy producers.[9] This auction model for renewable energy producers became an immediate success when the procurement programme became operational in 2011. This programme attracted numerous private investors in solar and wind parks, added clean energy to the grid, created jobs, strengthened the skills base, created green enterprises (see box 1), and lowered prices as competition started to play out over a succession of smaller bidding rounds.

So the carefully designed procurement rules, and the performant management by the Independent Power Producers Office, created positive results in a corruption-proof way.[10] Moreover, a coalition had emerged around a pocket of bureaucratic effectiveness, operating under the protective cover of the influential Minister of Finance. But power politics got in the way of sound economics and effective public management (see next section).

Box 1. The industrialisation potential of renewable energy producers

A detailed study of South Africa's green auction model provides evidence of its greater potential. Mike Morris and colleagues analysed how it interacted with the global wind value chain. Many in the ANC feared that foreign wind and solar multinationals would monopolise the market and industry. In reality, the procurement rules of the green public auction helped shape the interactions between these multinationals with other private sector actors in such ways as to create a domestic green manufacturing and servicing industry. There was even potential for increasing employment and other socio-economic benefits. To enhance that potential, the state would have to grow the capabilities and structures for dialogue with lead private companies, for adapting the regulatory environment and for insulating the procurement office from collusive and clientelistic interferences. Most importantly, the political commitment towards private investors had to be credible. For competition and innovation to play out more fully, a substantial share of renewable energy had to be added to the energy mix.

From existential crisis to the making of the JET

The opening to renewable power producers seemed to have weakened the coal lobby and broken the spell of coal path dependency. However, by 2015, Eskom and President Zuma abruptly halted the auction programme for renewables, with disastrous effects on the nascent green industry. By then, elite factions loyal to the president, with support from colluding business partners, had started capturing and repurposing key government ministries and other state institutions. The crown jewels were no doubt the ministries of finance and public enterprises. Zuma also stacked the boards and replaced the management of state-owned enterprises with political appointees (or *cadre deployment*).

This way, the Zuma power faction sought to control large procurement budgets of state-owned enterprises for the purpose of centralising rent capture and maintaining control over fractious elite factions. It also served a growing black constituency that had gained access to the coal value chain, which extended from coal mines, and logistics to maintenance. A weakened law enforcement, moreover, enabled criminal gangs to insert themselves in this value chain, and even within Eskom. Ethno-populism provided some of the ideological justification: the struggle against *'white monopoly capitalism'* or in support of narrowly defined *black economic empowerment* and *radical economic transformation.*

Whatever the motive or justification, the effects of what came to be known as *state capture* were dramatic for public administrations, public service delivery, the economy, and state-owned enterprises such as Eskom, the biggest state spender. State capture plunged the young constitutional democracy into an existential crisis. It also sparked a burning platform for a counter-movement within and outside the ruling ANC and its alliance partners of labour and the Communist Party. President Zuma was ousted from power in early 2018 amid an avalanche of well-documented corruption scandals, accusations, damaging revelations, pending court cases and a push by those checks-and-balances institutions that had effectively resisted being *repurposed*. Civil society, independent media, academia, and others have also contributed to halting state capture.

President Zuma's challenger and successor, Cyril Ramaphosa, had mobilised support on an anti-graft, pro-constitution ticket. Ramaphosa entered the presidency in February 2018 with a commitment to "build a capable state" to tackle extreme unemployment, tenacious poverty, and the world's highest level of inequality. Unlike his predecessors, President Ramaphosa played a central role in energy system reforms, with measures to promote policy coherence among the multiple ministries with related mandates and to reach out to the private sector, civil society organisations and labour.

In response to the chronic electricity crisis, President Ramaphosa acted on three interlocking policy axes. First, early in his presidency he rebooted the public auctions for independent producers of renewable energy. Secondly, he organised a

Job Summit, in which social organisations reiterated the importance of a just transition in the context of climate action. This resulted, in 2020, in the creation of the *Presidential Climate Commission (PCC).* Chaired by the president, it consists of representative commissioners from within and outside government and operates with a politically savvy, technically well-equipped and networked secretariat, headed by a trusted senior civil servant.

The PCC is an independent body with a mandate to oversee and facilitate a just and equitable transition towards a low-emissions and climate-resilient economy and society. It rallied societal and inter-ministerial support behind a framework for a just transition. The cabinet approved the resulting *Just Transition Framework* in August 2022. This policy framework pooled ideas from well-organised broad consultations and from a swathe of commissioned research. It built on existing environmental and climate-related policies. This way, the PCC contributed to continuity, coherency and trust building.

A third axis consisted of opening an avenue to international climate finance. As of 2018 a small South African think tank seeded and socialised a proposition to overcome the binding constraint of Eskom's debt trap. The newly appointed, reform-minded CEO of Eskom, André de Ruyter, adopted and adapted this idea. He cooperated with the presidency and engaged with development finance institutions and large donors. The proposition was for donors to provide concessional finance in exchange for decommissioning electricity plants that had reached retirement age, combined with compensations for those victimised by such transition. A modified version became the foundation of the JETP.[11]

Recent developments and contestations

Since the signing of the JETP two years ago, the electricity crisis has worsened, hardening the opposition to the closing of coal plants. This threatens to reduce the opportunities for an orderly transition to greening the energy system and for the optimal use of its socio-economic development potential. Moreover, many of the disabling informal practices such as procurement fraud, pervasive political appointments, centralised rent-capture, and outright sabotage have persisted. All this complicates the reform agenda, with inevitable ramifications on the JETP.

The Minister of Mineral Resources and Energy, Gwede Mantashe, embodies the most influential opposition to renewables, although he doesn't frame it as such. Part of his mandate is to shape the future energy mix of South Africa, including the future of renewables. He decides on the closing of coal-fired power plants, which he resists, arguing for expensive repairs of coal generators, unproven technologies such as carbon capture, and long-term contracts for gas-fired power plants. In the war of words, Mantashe openly ridiculed the energy transition at the heart of the JETP as a "foreign concept", saying that donors treat South Africans as "guinea pigs".

Polarised energy politics, however, cannot explain all the policy incoherences or delays. Reforming the energy system is also inherently complex. Numerous moving and adaptive parts interact in multiple policy arenas, involving different – often overlapping – mandates held by different government ministries. Besides the Ministry of Mineral Resources and Energy, there are at least five other ministries involved. In March 2023, a minister of electricity was added to the mix within the office of the President. All have to work in tandem in adaptive ways, often impeded by incomplete information, inadequate technical capabilities and unintended consequences.

This complexity is well illustrated by one measure with impactful intended and unintended consequences. As the electricity blackouts intensified, President Ramaphosa concentrated ever more power in the presidency to tackle the electricity crisis while overhauling and greening the energy system. He established a mixed *National Energy Crisis Committee* to ensure the implementation of a far-reaching *Energy Action Plan* that was launched in July 2022.[12]

One such action was to ease the harmful effects of power cuts on businesses and households by lifting restrictions on the private production of renewable electricity. As this measure coincided with a spike in blackouts, it proved to be a game-changer. The private response to this opening was spectacular and unexpected. The total of projects for so-called *embedded* renewable electricity production spiked and eclipsed almost the total capacity for renewable energy that the public auction had generated from 2011 to 2015, and that utility-scale producers had fully installed by the end of 2022.

But this deregulation then had two unintended consequences. A first has been the shift towards a more disorderly transition as private, embedded electricity producers may – without appropriate public policies – erode the fiscal space for a more equitable transition. A second unintended consequence relates to Eskom's overburdened transmission system. Due to the rebooted public procurement programme for utility scale renewable energy producers, a pipeline of successful proposals was waiting to be granted access to the grid. By the end of 2022, due to slow reforms and poor investments, it transpired that Eskom did not have enough transmission grid capacity to connect the bulk of the successful wind projects.

Under Minister Mantashe the erstwhile highly effective Independent Power Producers Office had become a "failure". According to Anton Eberhard, a leading energy expert, the auction programme had "not added a single megawatt to the grid in the past five years" by October 2023. Many private embedded producers seeking access to the grid to sell surplus electricity, are likely to further clog the system without urgent reforms. Due to this recent binding constraint of an unreformed transmission grid, renewable energy production cannot be added quickly enough to the grid to compensate for Eskom's failing coal fleet.

This evolution had knock-on effects on the government's agenda. Grid development now tops the priorities, highlighting the need for the speedy creation of an independent transmission company, and for other measures to attract investments. In May 2023 President Ramaphosa informed parliament that the timetable to shift away from coal "must be relooked at". In other words, the closure of coal-fired power stations as presented in the JET Investment Plan would have to be delayed. He confirmed, however, that "we will transition to cleaner energy".

Asked for a reaction, a spokesperson for the German development ministry answered that the members of the International Partners Group showed "understanding" for the "short-term measures" taken.

Concluding remarks – heavy lifting ahead

South Africa is undergoing a devastating electricity crisis that locks the economy into a low growth rate of 1%, disproportionately harms the poor, and polarises politics. That polarisation had ramifications for the JETP. Political and social forces (especially in the coal-province of Mpumalanga) militated against the closing of coal-fired power plants, pushed back against energy reforms that smacked of privatisation and railed against perceived external interference in South Africa's energy system. Apart from being politically and ideologically contested, energy system reforms are also very complex.

Set against these odds[13] the JETP deal looks real. Despite the delays, political noise, unintended consequences and policy inconsistencies, the JETP has held with the International Partners Group. None of the five members have thrown their towel in the ring, and parts of the demanding agenda were acted on. In fact, two new donors – the Netherlands and Denmark – have joined the JETP. In November 2023, the Minister of Electricity declared that the amount of financial commitments under the JETP had risen from $8.5 billion to $12.5 billion. Others have indicated a preparedness to align their energy or climate sector support with the JET and the Just Transition Framework (interviews, May 2023).

The JETP has also held domestically. The PCC has played a crucial role in debating, socialising and coalescing around related social, economic and political challenges. In doing so it has enabled a wide range of actors to speak out on the JET Investment Plan, putting it up for – at times harsh – criticism, but also lending a degree of legitimacy to the broader pathway of a Just Transition. Delivering on the "just" component will be the real test of its legitimacy to many.

All this plays out in a wider context in which the economic case for coal has crumbled, the price for green technologies is lowering, and the power relations and agency by public and non-state actors have shifted away from coal, partly in response to the electricity crisis.

Looking ahead, the agreement on the JET implementation plan – announced for December 2023 – will be a third important milestone after the signing of the JETP and the JET Investment Plan. The implementation plan is expected to usher in a new phase and provide more transparency about the heavy lifting still to be undertaken, by whom and how. The PCC's critical appraisal of the JET Investment Plan and recommendations offer widely debated and home-grown quality guidance for moving from plan to action.[14]

Crispian Olver, executive director of the PCC, summed up the strategic choice facing the country at a jointly held conference by the Presidency with external partners in Cape Town early November 2023: either “we muddle along, we continue to obfuscate, we delay, we’re behind the curve as the world economy moves [...]. Or we embrace the transition, we try to understand where things are going, we get ahead of the curve in the places that matter, we build out the local value chains, we create the jobs that can be created in the new energy economy and we generally uplift people.”

Set against this choice facing South Africa, it is clear that the JETP can contribute to this transition, provided it navigates strategically and adapts to an environment with many uncertainties, and associated risks – such as those related to the outcome of the general elections in 2024.

Acknowledgements

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I’d appreciate comments on where I got it wrong – or where there are holes to fill, the more so as I am preparing a more extensive background paper after the publication of the JET implementation plan, in which I hope to do more justice to the nuances and insights shared with me on the challenges and potential of the JETP.

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Endnotes

1. See also Sierd Hadley for a useful characterisation of the JETP as a *country platform,* and lessons from the field of international aid. See Annika Seiler for a comparison with the JETP of Indonesia; and Elisabeth Hege for JET-related partnership reflections in a context of Africa-Europe relations.
2. The European Union and 11 member states have also committed €289 million in grants for JET related activities in South Africa, on top of the contribution through the JETP.
3. South Africa was the first UN member to put "just transition" on the UN climate agenda in 2011, and it was the first country to integrate the concept in its Nationally Determined Contribution in 2015.
4. The UK, as chair of the International Partners Group, will also publish a twelve month update.
5. In total, the International Partners Group committed $330 million of grant funding for the "just" component of the JET Investment Plan.
6. In South Africa these planned power cuts are referred to as *load shedding,* with time schedules announced in the media.
7. The economic historian Adam Tooze reminds of the interwovenness of Escom (as it was previously called) with the nuclear military ambitions of the apartheid state.
8. Currently, some 87% of households are connected to the grid, but one fourth cannot afford to pay electricity without depleting their food basket.

9. Mike Morris provides a detailed account of all the political economy actors and factors of this highly revealing episode in the country's trajectory to renewable energy.
10. This programme is known as the *Renewable Energy Independent Power Producers Procurement Programme.*
11. Emily Tyler and Lonwabo Mgoduso, Saliem Fakir and Richard Calland provide insightful accounts of South Africa's incremental steps leading to the creation of the JETP. An account of the diplomatic choreography leading up to the JETP and its carefully crafted investment plan is still lacking.
12. Ferial Haffajee painted a snapshot overview of these measures and key achievements after one year of implementation (June 2023).
13. And set against the wider challenges of protecting the constitution and building a capable civil service and state, as Ivor Chipkin reminds us.
14. Blended Taskforce and the Centre for Sustainable Transitions provided donor-specific guidance for "making climate finance work" and their support "fit-for-purpose".