

South Africa

The role of the Just Energy Transition Partnership in contributing to the implementation of South Africa's NDC: A new form of climate finance and international cooperation?



About this study

Project

Strengthen National Climate Policy Implementation:

Comparative Empirical Learning & Creating Linkage to Climate Finance

The project explores how international climate finance can support the implementation of NDCs in emerging economies and EU countries through comparative analyses and by providing a better understanding of the interface between finance and policy implementation.

Project coordination

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Chapter one

Executive Summary

1. Executive Summary

The Just Energy Transition Partnership (JETP) was announced amidst great expectation at COP 26 in Glasgow, where Germany, France, the EU, UK and USA together pledged \$8.5 billion to support the implementation of South Africa's Nationally Determined Contribution (NDC) and just transition. At the time and since, the Partnership has received attention globally, with the hope that it may represent a new form of impactful international climate finance and cooperation to support just transitions in the Global South. But since then, the journey of the JETP has followed a bumpy trajectory.

This research makes its contribution to an under-researched area of the literature, namely the JETP process, and does so by exploring the research questions: How might the JETP be contributing to implementing the "most ambitious target possible" of South Africa's NDC through focusing on power, transport and green hydrogen? Does it represent a new form of international climate finance and cooperation? Through utilising Robert Putnam's (1988) two-level game theory, the paper approaches international diplomacy and domestic politics as a two-level game, and seeks to unpack the JETP process, to identify its drivers and evolution. As an in-depth, qualitative single case study it draws on interviews, workshops and documentation from the process.

Tracing the evolution of the process, the research identifies how domestic and international factors, and actors have shaped how this two-level game has unfolded since the announcement of the JETP. The research revealed the importance of process for determining the financial offer, the participation of stakeholders, and the suitability of the JETP for the South African context. The JETP offered a new form of partnership to address some of the familiar stumbling blocks to progress of NDC implementation through international negotiations and domestic politics.

The JETP has provided a country-led platform, through which to articulate South Africa's financial needs of the NDC and just transition, with which they could approach and hold industrialised nations to account and provide support. While South Africa, primarily through the development of the JET IP has done the work to progress the JETP, its implementation has been confronted by a contested domestic political terrain which poses a real risk to the JETP's progress. At the same time, the lack of detail about the offer provided by the IPG has created mistrust in the Partnership domestically. More broadly the inadequate transparency and reporting has eroded trust and optimism around the JETP.

The lack of transparency characterising the Partnership is a limitation to establishing a more granular understanding of the JETP process and its underlying drivers to date. The findings in this case study are based on interviewing insiders to the process in South Africa, observing public sessions, and analysing documentation. The focus is on the interactions between the IPG and South Africa, and the domestic dynamics in South Africa. The IPG members' domestic dynamics informing their participation in the JETP is outside of the scope of this study and would be a valuable contribution for future research.

The role of a domestic knowledge base in South Africa has been notable, knowledge developed for the NDC, broader just transitions, and JET IP. This knowledge has provided the foundation for an evidence-based, national conversation to build support for the transition and address areas of contestation.

The JETP has played a valuable role in accelerating the conversation about the implementation of South Africa's NDC, raising critical questions that have not been addressed up to this point. Part of this is about building the capabilities within and outside the state to affect the type of integrated implementation required by the JETP and just transition. While the JETP holds much possibility, work lies ahead for South Africa and the IPG for it to deliver on its potential.

By unpacking the JETP process and discussing progress and challenges, the research aims to provide useful insights for the design and implementation of potential future tranches of the JETP in South Africa, and for other countries embarking on their own versions of a JETP journey during this important decade of implementation.



Chapter two

Background to the study

2. Background to the study

COP 26 in Glasgow held in November 2021 saw the announcement of the Just Energy Transition Partnership (JETP) through which Germany, France the EU, UK and USA committed to mobilise an initial \$8.5 billion over the following three to five years to support South Africa's just transition to a low carbon economy (International Partners Group, 2021). Since its announcement at COP 26, the JETP has attracted attention globally and the world is watching to see whether it might signal a shift in the climate finance landscape, a step towards a new model for climate finance and international cooperation which other countries might implement too.

Considering the need for countries like South Africa to come up with an implementation strategy for its Nationally Determined Contribution (NDC), and finance to fund such a strategy, the JETP may offer insights into how to move from political announcements to policy and implementation (Fakir, 2023). As part of this work, the South African Presidency, supported by the Presidential Climate Finance Task Team (PCFTT) and JETP Secretariat developed the Just Energy Transition Investment Plan (JET IP) approved by Cabinet on the 20th of October 2022, shortly prior to COP 27 in Sharm el-Sheikh, Egypt (Creamer, 2022). The JET IP articulated the broader vision, priorities and costing South Africa's just transition for the next five years.

Despite the global interest and anticipation of the JETP, questions remain about what might be required for it to deliver on its potential. Do the donors have clear criteria for allocating the finance? Does South Africa have criteria to assess the adequacy of the IPG offer? Where should the money be directed and how should it be managed? What interventions should it include and exclude? What aspects of justice are included – and which are neglected? What formulation of the finance is fit for purpose and unique to take the JETP beyond traditional financing to ensure that the finance flows are new and additional, and target otherwise difficult-to-finance points on a long-term decarbonisation strategy? How can the JETP play a catalytic role to unlock the future much larger sums of money required to fund South Africa's just transition?

These are some of the questions that will need to be explored for the JETP to be impactful and for it to inform learning about financing and institutional development required for implementing South Africa's NDC and just transition. So too could it generate valuable learnings for other parts of the world. Already there is interest in JETP-type models in places like Indonesia, India, Nigeria, Senegal and Vietnam to name a few. Therefore, how South Africa's JETP unfolds matters not only for the country but for other interested countries and donors too.

A large, stylized number '3' in a dark yellow color, serving as a background for the chapter title. The number is composed of two thick, curved segments that meet at the top and bottom, creating a central negative space.

Chapter three

Research questions and Aims

3. Research questions and Aims

Despite the JETP political declaration attracting much attention, the JETP process itself, and its current status, has received limited attention in the literature. This research seeks to make a contribution to this emerging body of literature by unpacking the JETP by exploring the following research questions. In so doing, it aims to provide insights into the JETP process, and influential factors that continue to shape its evolution and implementation.

Primary research questions

How might the JETP be contributing to implementing the “most ambitious target possible” of South Africa’s NDC through focusing on power, transport and green hydrogen? Does it represent a new form of international climate finance and cooperation?

Secondary research questions

1. How have domestic factors shaped the JETP process, and how has the JETP process impacted on domestic processes?
2. How have international factors shaped the JETP process, and how has the JETP process impacted on international processes?
3. Who have been key actors in the JETP process and what roles have they played?
4. What are some of the core characteristics that have defined the JETP process and cooperation?
5. What can we learn about implementation from the JETP? To what extent and how will the implementation of the JETP fund social justice?
6. What are some of the key learnings from the JETP for future tranches of support for South Africa’s just transition and for other countries trialling their own version of a JETP?



Chapter four

Conceptual approach

4. Conceptual approach

4.1. Putnam's two-level game for international diplomacy and domestic politics

This research draws on Robert Putnam's (1988) conceptualisation of the interaction between international diplomacy and domestic politics as a two-level game. Level I plays out at the international level, and can be thought of as a negotiation process which includes bargaining between negotiators representing different countries, which produces a tentative international agreement that then needs to be exposed to domestic scrutiny. At the international level, national governments attempt to represent the interests of domestic constituencies whilst appeasing the interests and concerns of international actors (Putnam, 1988).

Level II plays out at the domestic level and can be thought of as a process of domestic negotiation and ratification, which consists of discussions between domestic constituencies about whether to ratify the tentative agreement negotiated by their national governments in the international arena. Domestic actor groups attempt to put pressure on national government to protect the interests of their constituencies, and in turn government tries to establish coalitions of support of domestic actors for the positions or agreements they are championing at the international level. Putnam identifies the important role of chief negotiators, often national political leaders that operate at both levels of the game. The tension for these actors is that moves at one level may not be advantageous at the other level, and hence it is a tension that needs to be carefully managed (Putnam, 1988). This theoretical approach relies on a collection of core concepts for its operationalisation which are discussed below.

Actors

Actors play a key role in shaping domestic and international negotiations, based on their ability to participate in both levels, coordinate and connect these levels, and their resources and power. Putnam (1988) highlights the chief negotiator as the central actor, but there are others too, and coalitions between them are important. Domestic actors are particularly important for ratification and implementation. On the other hand, international credibility influences the ability of country negotiators to find international agreement but is contingent on negotiators' abilities to deliver at the domestic level (Putnam, 1988).

Synergistic issue linkage

Issues that both domestic and international actors have interest in promoting can be thought of as synergistic issues and can be a way to enhance alignment between these actors and the levels they represent, thereby building support for progress around this set of issues. Conversely, issues around which there is contestation or divergence may hinder progress (Putnam, 1988).

International and domestic factors

International and domestic factors, such as the political context, state of the economy, public discourse, state of the knowledge base, and interest groups, shape what is possible at each of the levels, and interact to determine what is possible as the product of the interactions between these

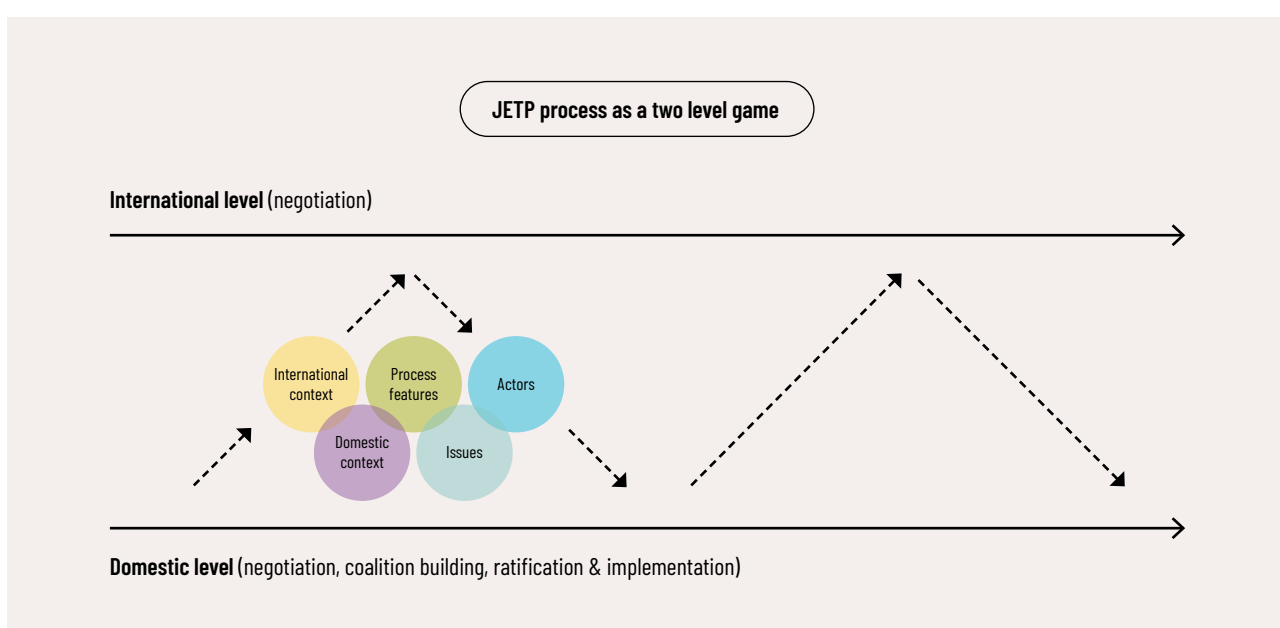
levels. It is therefore important to highlight these particular factors for the process being studied (Putnam, 1988).

Institutions

While not being explicitly included in Putnam’s two-level game, institutional features are considered to understand how they have shaped the process, the interaction between the international and domestic levels, and how they might influence implementation.

Figure 1 illustrates the JETP process as a two-level game, dependent on the core concepts discussed above, which are drawn on to investigate how these two levels interact with one another, shaping the process and outcomes of the JETP.

Figure 1 – Understanding the JETP as a two-level game



Source: Author’s own

4.2. The use of Putnam’s two-level game to understand the interaction between national and international climate policy

Putnam’s (1988) two-level game has already been applied to make sense of the interaction between national and international climate change policy (Keohane & Oppenheimer, 2016; Kroll & Shogren, 2008), in the United States (Lisowski, 2002; Milkoreit, 2019), China (Renjie, 2021), Switzerland (Ingold & Pflieger, 2016), amongst others.

Keohane and Oppenheimer’s (2016) application of Putnam’s (1988) two-level game helped to reveal how the Paris Agreement opened up a door of possibility. The strategies and assets of different actors in the international negotiations shaped their influence. Such strategies included OECD countries’ commitments to limit emissions and provide finance and technical assistance to BRICS countries to the extent to which they decide to reduce current emissions and avoid future emissions, and small,

low-income countries' appeals around fairness, and granting legitimacy to the international process, dependent on the support they receive. Domestic coalition building was identified as important for all countries to exert influence and for enabling action. Kroll and Shogren (2008) highlight how domestic constraints influence international bargaining, focusing on the differences in the political systems of the US and EU, as one of the drivers of their different levels of ambition in the international arena. Along with the political systems, domestic preferences and interests constrained the international negotiators of these countries (Kroll & Shogren, 2008).

Milkoreit (2019) explores the influential and evolving role of the US in international climate negotiations, highlighting how the development of the Paris Agreement, and the US' active participation in shaping the Agreement, enabled President Obama to better align domestic and international positions and with it, making sure the US would be a signatory to the Agreement. Crucial to the participation of the US was actively shaping a global agreement without legally binding obligations and therefore Congressional ratification could be circumvented, allowing for ratification by executive agreement. The bilateral agreement between the US and China was another key factor in encouraging both Parties to actively participate in the forthcoming agreement. The US' involvement in the Paris Agreement stood in stark contrast to the role they played in the failure of COP 15 in Copenhagen, but showed too how changes in domestic and international variables are possible, and how these influenced one another (Milkoreit, 2019).

Renjie's (2021) use of the two-level game to understand China's participation in international climate policy, identifies domestic factors such as the political system, energy scenario and the involvement of environmental NGOs as key factors driving the evolution in China's position and participation in international climate policy. International factors included the desire for China to participate in rule-making of international climate regime, such as pushing for common but differentiated responsibilities (CBDR) under the UNFCCC, their endeavour to change their international image and be more prominent in international cooperation for climate change, the bilateral agreement with the US before Paris, and the pressure for them to take on more responsibility to act on climate change, given the country becoming the largest global emitter (Renjie, 2021). Other factors included the flexibility of CDM, and changes in attitude of central government to environment, which led to changes in the guidance they provided to bureaucracies, improvements in national climate decision-making institutions and coordination mechanisms. The participation of most-trusted scientists in the IPCC, and the coalitions of pro-environment domestic groups in China with international partners, were all examples of the reverberation of the international level experienced in China (Renjie, 2021).

Ingold and Pflieger's (2016), operationalisation of the two-level game, represents an actor-centric approach for assessing Switzerland's climate policy, particularly those key actors involved at both national and international levels. The relation profiles, interests and resources, were isolated as core characteristics of actors attempting to exert influence. The study reveals that few actors have the power to link both national and international processes and therefore influence coordinated policy outputs across these two levels (Ingold & Pflieger, 2016).

These case studies demonstrate how the two-level game has been used as a conceptual approach for studying the interaction between domestic and international climate policy. But it has not been applied to African countries nor to JETPs. Therefore the conceptual contribution of this paper is twofold. To extend the two-level game by applying it to studying the interaction between national and

international climate policy in an African country, namely South Africa. Furthermore, the Putnam's framework is adapted and applied to the JETP in South Africa, with the aim of providing relevant insights for JETPs in other parts of the world.

Adapting the two-level game to the JETP in South Africa requires a characterisation of the country's policy context and the country's version of a JETP. The core intention of operationalising this framework is to identify factors to consider for enhancing the impact of JETPs. Put differently the framework aims to reveal and capture learning from experience both progress and challenges, and to enable those working on JETPs to utilise the momentum and window of opportunity created by JETPs.

An international relations approach with Putnam's framework is appropriate in two respects. Firstly, to provide insights for the project that this research forms part of, namely the SNAPFI project, which seeks to contribute to advancing understanding on how international climate finance and cooperation can support the implementation of national climate policy. Secondly, it provides an appropriate line of investigation for unpacking the JETP as an example of the types of instruments available through the international process to support implementation of South Africa's and other countries' NDCs, and how the design and implementation of these instruments can be enhanced.

Chapter five

Methodology

5. Methodology

This research has adopted a qualitative single case study design to uncover in-depth insights about the JETP in South Africa. A single case study is appropriate as it allows for in-depth analysis to understand the context within which the object of study is embedded, and allows the research to draw on a variety of data sources such as documents, direct observations, workshops and interviews, making possible triangulation. Used in combination with the conceptual framework that has been presented above, a case study allows this research to generalise the findings according to this conceptual approach, rather than statistical generalisation as may be appropriate with a large n study (Landman, 2008; Yin, 2014).

The study has drawn on a diverse range of data sources, including academic and grey literature and government documents. The announcement of the JETP and JET IP led to numerous workshops, webinars and side events, particularly at COP 27. These events offered the opportunity for direct observation of actors reflecting on the JETP political declaration and process and the JET IP, thereby providing a rich source of data for this research.

To engage with the diverse views of civil society in South Africa on the JETP, the workshop and launch of the book “Contested Transition: State and Capital against Community” (Hallowes & Munnik, 2022) was attended. A workshop was also conducted for this research to share initial findings and collect additional data to corroborate interview findings. A close following of the media was essential throughout the course of the study to trace the evolving domestic discourse around the JETP and specifically how domestic political dynamics were shaping the evolution of the Partnership.

Lastly, the research carried out semi-structured structured interviews with twelve key international and domestic actors that were either intimately involved in the process or marginalised. The interview sample sought to represent all major groups of social partners in South Africa, as well as some members of the IPG. To cite interviews and protect the anonymity of interviewees, the following convention is used (1, 6), which indicates that interviews 1 and 6 are being cited. Table 1 on page 19 is a list of the interviews conducted, according to the stakeholder groups represented.

Table 1 – List of interviews

Date of interview	Stakeholder group represented
28 February 2023	Civil society
9 March 2023	Research & Civil Society
13 March 2023	International
27 March 2023	International
27 March 2023	South African Government
30 March 2023	South African Government
31 March 2023	PCC
4 April 2023	PCC & PCFTT
24 April 2023	Organised Labour
3 May 2023	South African Government
26 July 2023	International
27 July 2023	PCFTT

Limitations

Firstly, the formulation of the JETP political declaration and its ongoing status has been a closed, opaque process, making it difficult to observe and analyse as an outsider. This makes assessing influence in shaping the process and its outcomes difficult. Nevertheless, the research has sought to mitigate these challenges by interviewing insiders to the process in South Africa, observing public sessions, and analysing documentation, thereby making a contribution to establishing a more granular understanding of the JETP process and its underlying drivers to date.

Secondly, the focus of this study is on the interactions between the IPG and South Africa, and the domestic dynamics in South Africa. For effective international cooperation, scrutiny is required of all players involved, not just of the countries receiving funding, as is so often the case. Examining the domestic dynamics that the IPG members are operating according to in the JETP is outside of the scope of this study, which is located within South Africa, and it would be a valuable contribution for future research.

Finally, the JETP is still unfolding, and it is anything but clear how it will play out, and which interests are winning out. Nonetheless, in the context of the limited duration of the JETP offer, the need to start with implementation is urgent and the analysis reflects on what has been achieved in the 18 months since the initial announcement of the Partnership.

Chapter six

**The JETP — What we know
so far about the
process and the package**

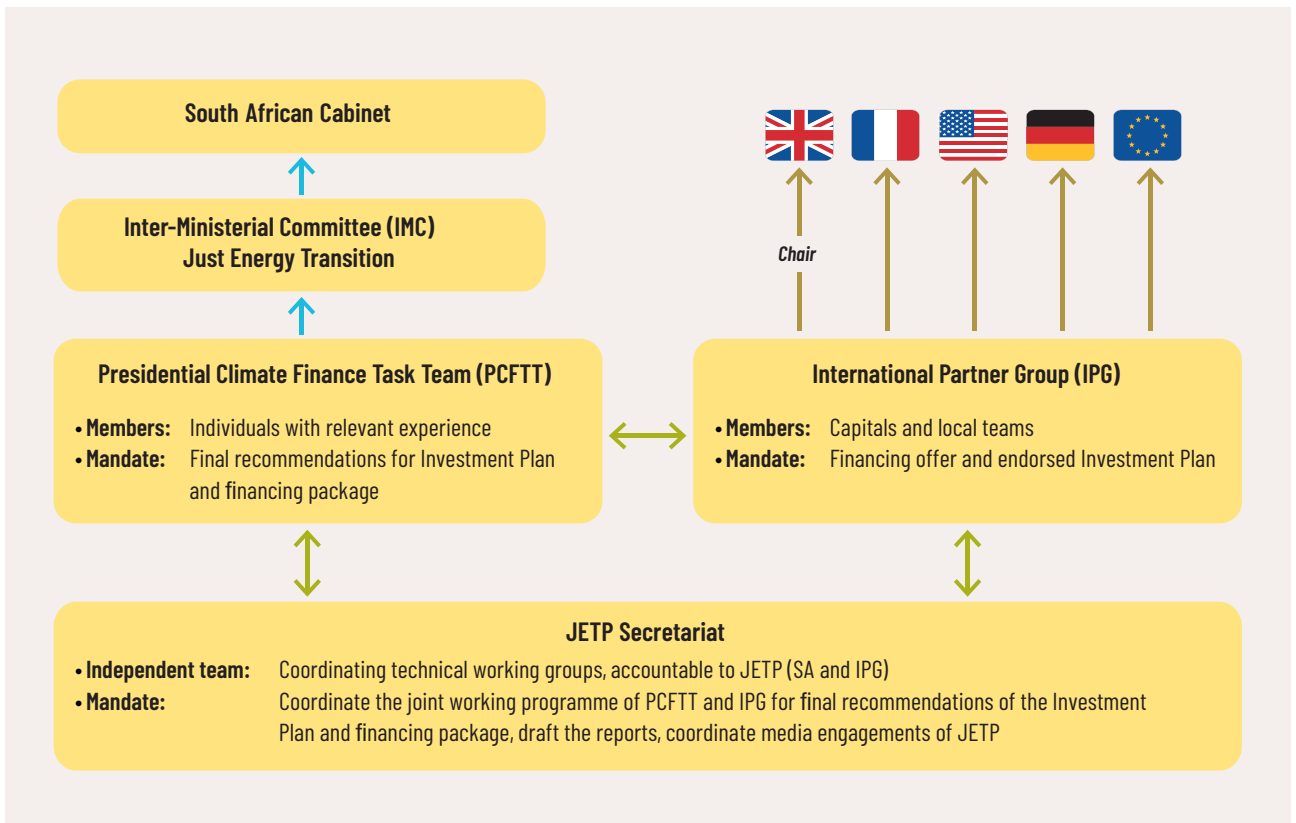
6. The JETP – What we know so far about the process and the package

Although the JETP has received much attention domestically and globally, very little of the process has been documented and reflected on. Paying attention to process is important as it can reveal some of the drivers of the evolution of the JETP, or lack thereof, and can help to explain its current status.

6.1. The process

Observing the JETP process reveals that its timing was important, able to capitalise on an opening of a window of opportunity brought about by the interaction between international and national drivers. A notable collection of domestic drivers was that of an enhanced NDC which South Africa submitted in September 2021, months before COP 26, and the work that had already been done domestically to explore options for funding mechanisms to support the country's just transition (Naidoo, 2022; Steyn et al., 2021; Winkler et al., 2023). The NDC, specifically the enhanced mitigation targets, a compelling and well-supported knowledge base, and a link to South Africa's Long Term Low Emissions Development Strategy for 2050, which included an aspirational, net zero target by 2050, was perceived favourably by donors (4, 5, 6, 10). Notable though by its absence was an NDC implementation plan and the necessary finance. At the international level, the need for the UK as the COP Presidency to deliver progress at COP 26, and for industrialised nations to deliver on their financial promises, created pressure to show tangible results. This along with the fact that South Africa had already started to explore options for some kind of just transition financial mechanism to support the domestic transition with the support of international partners (Naidoo, 2022; Steyn et al., 2021; Winkler et al., 2023), and a positively perceived updated NDC, created interest in South Africa from international partners. This confluence of factors and the timing led to the negotiations around the JETP in the lead-up to COP 26. At COP 26 the political declaration committing the IPG to \$8.5 billion was announced which attracted much attention at the COP and in the subsequent months. Following its announcement, the Partnership generated momentum domestically and drove a number of important institutional developments, represented in Figure 2 opposite for the JET IP, and discussed in section 7.

Figure 2 – Governance structures for the JET IP



Source: The Presidency, 2022b, p. 2

The JET IP articulated and costed a broader vision and plan for enabling the overall just transition of South Africa over the next five years. This then represented the implementation plan for the electricity sector that the NDC was lacking and provided much needed detail to articulate the associated finance need. The JET IP was informed by the preceding process and work to develop a Just Transition framework (JTF), a national process in South Africa which culminated in the release of the Framework in June 2022 (PCC, 2022b), as well as the rich body of technical work developed by South African organisations on just transitions in the years leading up to the announcement of the JETP and JET IP. Importantly the JET IP showed that the JETP represented only a small fraction of the finance needs, and therefore needed to be catalytic. This was important for situating the discussion around the \$8.5 billion in a much broader picture, providing perspective on its contribution. The development of the JET IP catalysed a substantial domestic process to ensure the JET IP would be ready for COP 27 in November 2022, to showcase the progress South Africa had made, and to make the case for how the JETP could contribute to the implementation of the JET IP. After COP 27, amid pressure from social partners in South Africa, the JET IP was taken through a range of consultations, led by the PCC so that the South African public could comment on and contribute to the evolution of the plan, and to build country ownership. The consultation process for the JET IP included sessions with youth, business, civil society, labour and local government. Secretariat Working Groups on electricity decarbonisation, green hydrogen, NEVs, just transition, and IPG financing agreements were set up to support the JETP Secretariat’s technical work on these priority areas and to enable the participation of representatives from different constituencies, allowing for another mode of engagement with the Plan (The Presidency, 2022b).

Both COP 26 and COP 27, and the work leading up to these meetings generated momentum and attention around the JETP and JET IP, internationally and domestically. Domestically though the process for negotiating and developing the JETP and the JET IP, has been subject to critique for its lack of transparency and inclusivity, with stakeholders arguing the process and the Partnership itself resembles a black box, with only consultations being held for the JET IP after it had been developed and not at all for the JETP (1, 2, 3, 6, 7, 8). But the closed nature of the process has been interpreted to be a strategy of the South African Presidency to circumvent opposition from within the government (4, 6, 10). The opposition encountered within the South African government, is considered to be symptomatic of a fractured ruling party and state. In response, the Presidency has moved to break the stalemate that has impeded progress by pushing ahead with despite concerns about inadequate consultation (LAC & FFCSA, 2022b, 2022a), which some interpret as being driven by the fear that by making the process more inclusive it would have been more vulnerable to opposition, thereby slowing down progress or derailing it completely (3, 4). The JETP and JET IP have encountered resistance anyway but at a much later stage, making it more difficult to resolve despite the consultations run by the PCC. This then is indicative of how decisions by an actor, like the Presidency which were taken to drive progress at the international level and circumvent domestic contestation, turned out to be disadvantageous at the domestic level (Putnam, 1988), creating pushback that the Presidency is now having to address.

Despite the attention received by the JET IP and JETP, a notable feature of the process has been its lack of transparency, with very few status updates, their details and progress achieved. This had made it difficult for social partners across the board to get a sense of progress achieved and challenges encountered and has contributed to a loss of momentum compared to what was visible around the two COPs. As a result, question marks remain about the process, its inclusivity, its progress and even current status, as well as the adequacy of the offer itself. These are some of the issues raised by social partners in May 2022 when the PCFTT presented the progress on the JETP. The single biggest criticism was the failure of the IPG to provide details about the offer (PCC, 2022a). Some of the details of the offer are discussed in the following section.

6.2. The offer

Despite the release of a detailed 216-page JET IP lays out a comprehensive investment plan for the Just Energy Transition in South Africa over the next five years, totalling R1.5 trillion, and numerous workshops and side events, there are still relatively few details about the JETP. So what do we know so far? Table 2 provides a breakdown of the amount and types of funding each member of the IPG has committed to under the JETP.

Table 2 – A breakdown of the JETP per donor and type of funding

\$ millions	Grants/TA	Concessional loans	Commercial loans	Guarantees	Total
CIF/ACT	50	2 555	0	0	2 605
European Union	35	1 000	0	0	1 035
France	2.5	1 000	0	0	1 002.5
Germany	198	770	0	0	968
UK	24	0	500	1 300	1 824
US	20.15	0	1 000	0	1 020.15
Total	329.7	5 325	1 500	1 300	8 455

Source: The Presidency, 2022b, p. 2

While the JETP is an encouraging development, Table 2 demonstrates that much work lies ahead to make the Partnership a longer-term success. The percentage of grant financing is less than 4%, lower than expected by South Africa, a sentiment echoed by stakeholders across the board from President Ramaphosa to civil society and communities (PCC, 2022a). This then is a first area of weakness, more grant financing particularly for funding the justice elements of the transition is required. And although concessional loans make up the largest portion (63%) and have a key role to play, details about them are limited.

Concerns around loans being dollar- or euro-denominated centred around the fact that despite concessional interest rates, the currency exchange risk over the extended period of time over which the loans will be repaid represents a major risk for South Africa and its existing debt burden. The commercial loans included in the deal (nearly 18%), have also led to concerns that the deal will increase the indebtedness of South Africa, which already stands at an extreme of 80% debt to GDP ratio (The Presidency, 2022b). Table 3 provides a breakdown of the finance per focus area contained in the JET IP.

Table 3 – JET IP financing per focus area

ZAR (\$) billion	Electricity	New Energy Vehicles (NEVs)	Green Hydrogen
JET IP Financing needs	1 030 (68.7)	128 (8.5)	319 (21.3)
JETP package			
Infrastructure	6.9	0.2	0.5
Planning and implementation capacity	0.7		0.2
Skills development	0.012		
Economic diversification & innovation	0.022		
Social investment & inclusion	0.016		

Source: The Presidency, 2022b, p. 2

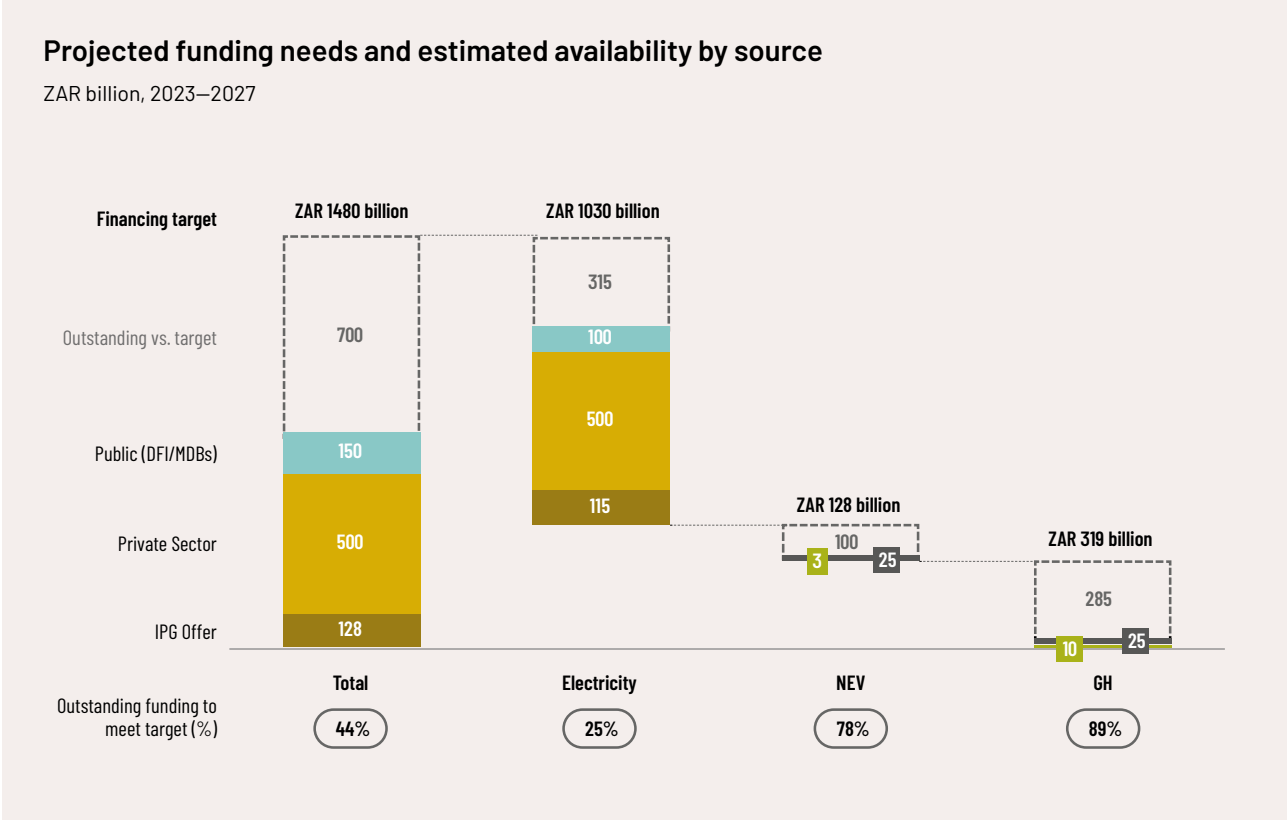
The electricity sector is to receive the lion’s share of the financing, over 80%, with the focus on strengthening electricity infrastructure, particularly the state-owned transmission grid and distribution networks, accelerating the deployment of renewables and the decommissioning of coal. This is seen as one of the main strategies to leverage private capital to invest in scaling up renewable energy generation, which would be made possible by the strengthened grid and network, thereby offering an example of the catalytic effect of the JETP which has been a central talking point.

NEVs and green hydrogen will receive far smaller portions, which is unsurprising given the state of play in these respective sectors. The automotive manufacturing industry is a key employer and exporter for South Africa, and therefore transitioning the sector to the production of electric vehicles is a socioeconomic imperative. The domestic benefits of the developments in green hydrogen are less clear, although there is major interest in green hydrogen from South Africa’s major trading partners like the US and EU.

From a justice perspective, the initial allocation, with only 0,59% of the total allocation dedicated to skills development, economic diversification and innovation, and social investment and inclusion paints a concerning picture. These elements are core to determining how the implementation of the JETP will lead to just outcomes, and confirm fears of local stakeholders that the JETP would not commit enough funds to these important elements (Hallowes & Munnik, 2022)(1, 2, 9). Still, the IPG has indicated its intention to find ways to scale up grant funding to support communities and workers affected by the transition (The Presidency, 2022b). Whether they will deliver on this commitment remains to be seen.

Scanning out to position the JETP in the broader context, the JET IP clearly shows that the JETP (represented as “IPG Offer”) makes up only a fraction (12%) of the total investment needed for South Africa’s transition over the next five years and big funding gaps exists, as illustrated by Figure 3.

Figure 3 – The JETP in the overall context of the financing need communicated by the JET IP



Source: The Presidency, 2022b, p. 2

Major funding gaps are present in all three focus areas, with a total funding gap estimated to be around R700 billion, nearly half the overall investment need articulated by the JET IP over the next five years. The role of the JETP and its design needs to be situated within this broader picture if it is to fulfil its envisaged and much-talked-about catalytic effect to unlock larger sums of capital, particularly private capital. Part of this will be the need to match the JETP with the JET IP needs and to establish the appropriate institutional channels to enable a fit-for-purpose, impactful and catalytic response (The Presidency, 2022b). Furthermore, it is clear that the JETP fails to adequately reflect important principles identified by the JTF and JET IP, particularly those around distributive, procedural and restorative justice (The Presidency, 2022b). What happens in the next five years with the JETP and more broadly, will be imperative for determining the scale and speed of change and the direction of travel for South Africa’s longer-term just transition. After this overview of the JETP process and package, the paper now turns its attention to the literature on South Africa’s JETP.



Chapter seven

Reviewing the literature on South Africa's JETP

7. Reviewing the literature on South Africa's JETP

There is a growing body of literature seeking to understand how work on climate, energy and development can deliver just transitions in the Global South. Perhaps more so than anywhere else in the world, is this need most pressing in Africa (Sokona et al., 2023). While a continental vision is needed, so too are country-specific visions, strategies and mechanisms. This brief review of the literature seeks to characterise the South African context and map out the current understanding of the JETP within this context.

7.1. Context specificity is key for the JETP to address the South Africa's unique challenges

A unique set of features characterise the South African context and determine design considerations for the JETP to be fit-for-purpose to deliver impact (Blended Finance Task Force & Centre for Sustainability Transitions, 2022). Some core features include the carbon intensity of South Africa's power system, economy and exports, and the power crisis the country is in the grips of due to its aging coal-based power system and electricity grid. At the same time the country faces extremely high levels of unemployment, poverty and inequality and is highly indebted. Given that the coal value chain is an important employer, there are concerns over the socioeconomic implications of transitioning out of coal. The country's rich renewable energy resource offers a solution for the power crisis, and new industrialisation pathways for South Africa (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Fakir, 2023; Naidoo, 2022; Tyler & Mgoduso, 2022).

South Africa has a robust knowledge base that underpins the Just Transition framework (JTF), JET IP and NDC, which has laid the foundation for a national, evidence-based discussion and consensus building through demonstrating a compelling case for a just transition and its socioeconomic impacts (ACF et al., 2022; Tyler & Mgoduso, 2022). Local research has grappled with the sectors and workers at risk, jobs, participation of youth, and gender dimensions of just transitions (Hallowes & Munnik, 2022). Labour unions like COSATU have articulated an eco-socialism vision for just transitions in key sectors and value chains like coal, transport and agriculture, and the position of workers in a transitioning economy (COSATU, 2022). The Just Transition Transaction (JTT) was a mechanism explored prior to the JETP, to support an accelerated just energy transition, through offering concessional support based on actual reduction of carbon emissions. Unique features of the JTT were its approach to dealing with Eskom's debt, creating additional fiscal space within a heavily constrained fiscal environment, and unlocking accelerated decarbonisation through a system-level intervention for the transformation of the power sector (Steyn et al., 2021; Tyler & Mgoduso, 2022; Winkler et al., 2023). Naidoo (2022) outlines different types of transition finance, the importance of a theory of change and justice elements, the need for guiding principles, and the potential of purpose-driven funds to drive just transitions, particularly justice elements. Other important ingredients highlighted include moving from project-based approaches to funding to integrated portfolio approaches, and the importance of country

ownership and modalities tailored to the South African context. Lastly, screening criteria are identified as important for ensuring quality and efficacy of finance (Naidoo, 2022).

An important idea raised by the literature is the creation of some form of special purpose fund, or just transition fund to ensure the financing secured can effectively target and impact the justice dimensions of South Africa's transition (Naidoo, 2022; Steyn et al., 2021; Winkler et al., 2023). Other important themes highlighted are the need for an agreed-upon set of principles that finance mobilised needs to adhere to, and to provide concrete and specific options for investment (Winkler et al., 2023).

Areas identified for future research include identifying barriers and developing solutions, institutional analysis (Tyler & Mgoduso, 2022), analysis of climate justice elements such as health, education, youth unemployment and environmental rehabilitation (Blended Finance Task Force & Centre for Sustainability Transitions, 2022), demonstrating the risks and the positive socio-economic impacts of a transition, and a plan that explicitly addresses how it will meet the lower range of the NDC (Burton, 2022).

A robust and well-communicated knowledge base is indispensable for building consensus and addressing areas of contestation (ACF et al., 2022; Tyler & Mgoduso, 2022), and the LT-LEDS could serve as a useful input to embed the JETP and JET IP in a long-term vision for South Africa (Torres Gunfaus et al., 2022). A domestic knowledge base has provided the foundation for and informed negotiations around the JETP (Blended Finance Task Force & Centre for Sustainability Transitions, 2022). However, knowledge alone is inadequate to drive implementation, much work remains to translate evidence into action. Some of this work could include making clear how the JETP can contribute to the implementation of the NDC, building on existing knowledge, policies and legislation, and mobilising existing capabilities (ACF et al., 2022).

7.2. The potential of a JETP to respond to South Africa's challenges

JETPs offer a model to attract large-scale investments to drive transitions and positive socio-economic outcomes in South Africa and other countries in the Global South (Fakir, 2023). The framing of the transition and its implications has a key role to play in building support, communicating the opportunities and addressing the risks of a transition, not least of all developing convincing plans to address these risks, plans co-created by those who will be most impacted (Fakir, 2023; Tyler & Mgoduso, 2022). The JETP has been instrumental in contributing to a domestic conversation about the future of the South African economy, possible development pathways and how to address issues of justice, assisted by international support. Not only is international support an imperative for South Africa, but an obligation for industrialised nations to support given their commitments under the UNFCCC (ACF et al., 2022; Fakir, 2023). JETPs therefore offer a mechanism for country-level support from the international community, against a clear plan (ACF et al., 2022).

The JETP also has a reputational significance in that it is an opportunity for the IPG, representing a group of industrialised nations to show to South Africa and the Global South their commitment to delivering on the missed goal of \$100 billion per annum by 2020 and thereafter increasing, which is

still unmet. Given the breakdown in trust due to the failure of developed countries to deliver on climate finance promises, this is a key moment to repair some of the trust and lay the basis for new forms of cooperation and a new way of aligning financial flows as per Article 2.1c of the Paris Agreement (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Tyler & Mgoduso, 2022). Some other key donor principles highlighted by the literature include transparency and accountability, coordination, complementarity with other investments, being demand-driven, and working towards a whole-of-society approach that is based on inclusive decision making (Blended Finance Task Force & Centre for Sustainability Transitions, 2022). It is not only the quantities of JETP IP funding that is of concern, but also the modalities and the quality of finance, to support a country-led and fit-for-purpose partnership that delivers impact (Naidoo, 2022; Tyler & Mgoduso, 2022).

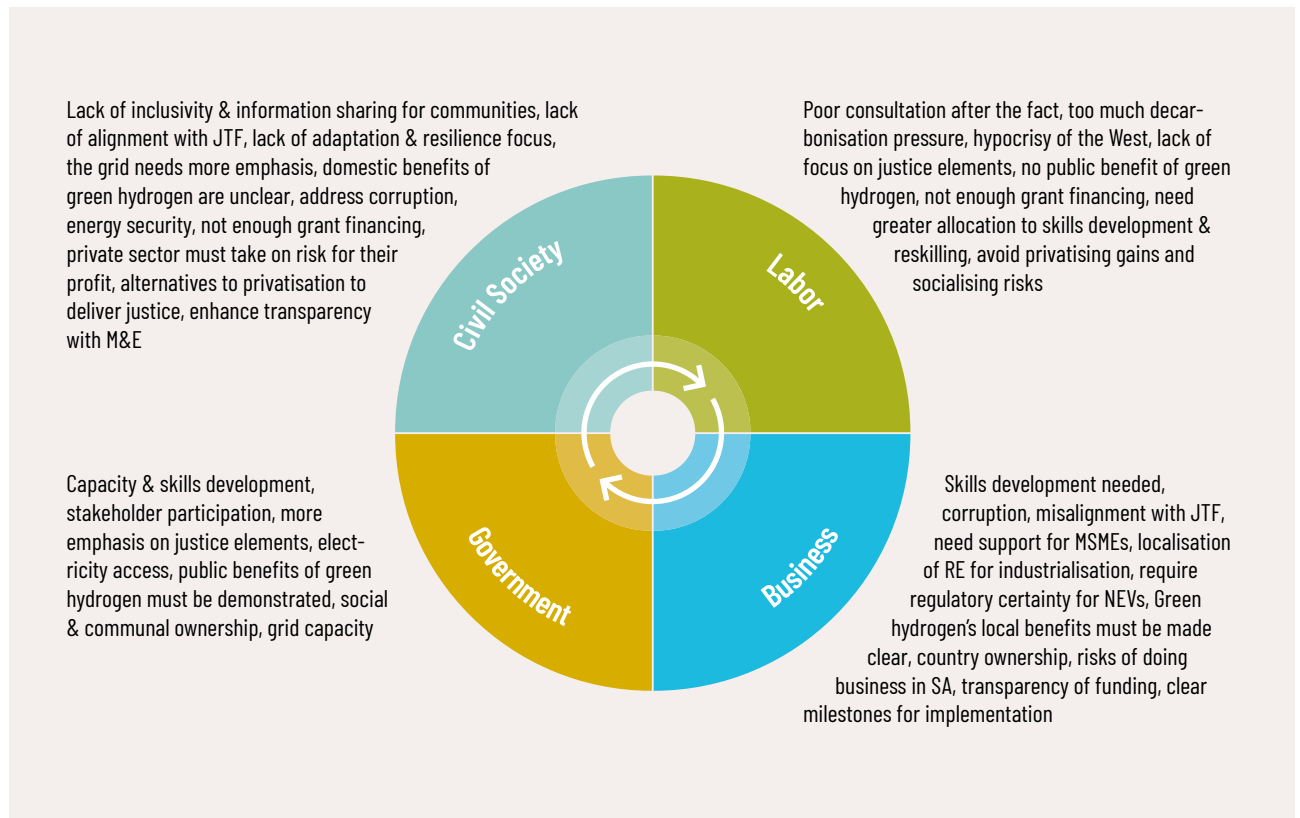
Baloyi and Krinsky (2022) highlight concerns that the existing JETP represents an expensive model for the Global South, as the state takes on the risk through providing sovereign guarantees, and blended finance subsidises the cost of capital for IPPs. They further highlight the concern that privatisation and profit seeking in the development of the power sector are likely to increase the cost of electricity and exacerbate energy poverty, as well as hinder localisation efforts for manufacturing in the pursuit of least cost inputs and highest profits (Baloyi & Krinsky, 2022). Other studies have taken a different view, highlighting the constraints of public finance, and the necessity for a larger role for the private sector. Some of the modalities proposed for the private sector to finance JETP in South Africa include: ESG investing, impact investing, establishing special purpose JET funds, transition bonds, pay for performance programmes, as well as other market-based products specifically to address the imperative of enhancing energy access (Intellidex, 2023).

Lastly, the negotiation, design and implementation of the JETP rest on the capabilities of those involved. Importantly, different sets of capabilities will be needed for negotiation and implementation. A priority for mobilising the requisite capabilities should be to address the challenges of infrastructure delivery that have plagued the South African government for the last decade, if not longer. Ultimately capabilities need to deliver a coherent and integrated approach across government, achieved by clear mandates and supported by the necessary resources. While national government has been central to the JETP negotiations, subnational governments will have key roles to play in implementation (ACF et al., 2022).

7.3. Actor perspectives on the JETP and JET IP processes

In an attempt to understand and represent the concerns and priorities of stakeholders on the JET IP, the PCC ran a process to gather and communicate these perspectives. While these are not targeted at the JETP itself, they provide relevant insights into the positions of actors in the discussion around South Africa's transition. A summary of these perspectives is provided in Figure 4 below.

Figure 4 – An overview of stakeholder perspectives on the JET IP communicated in a PCC report



Source: Presidential Climate Commission, 2023

For the transition to be just, workers and communities are central. There currently exists a high degree of anxiety about job losses amongst workers and how, specifically, workers will be involved in the transition so that they are better off than they are currently. The small funding allocation to skills development, economic diversification and innovation, and social investment and inclusion has done little to allay these fears (Hallowes & Munnik, 2022; Life after Coal Campaign, 2022).

While the transition will mean that some workers will need to relocate, diversifying the economy of Mpumalanga will be crucial for minimising relocations. Diversification could unlock opportunities such as mine rehabilitation, agriculture and industrialisation. Agriculture represents an opportunity for a labour-intensive pathway. Given the vulnerability of workers and communities, there is a strong call for a clear plan to retrain, compensate and relocate workers. Workers, communities and labour unions have stressed the need to address affected communities and involve them in decision making (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Hallowes & Munnik, 2022). Inclusivity and participation are therefore key principles for the design and implementation of JETPs

(ACF et al., 2022). A commonly-voiced criticism of the process to arrive at the JETP and to develop the JET IP was the inadequate transparency and participation (LAC & FFCSA, 2022b, 2022a). The insufficient information sharing and access to the process made it difficult for civil society to provide input, hindering meaningful engagement (Baloyi & Krinsky, 2022; Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Wemanya et al., 2022). These concerns raised questions of accountability and equity of access, highlighting the need for clear avenues of engagement in design and implementation of the JETP, and an inclusive platform to enable regular and sustained engagement, promote flow of information and raise awareness on the progress of the JETP (Hallowes & Munnik, 2022; von Lüpke et al., 2023; Wemanya et al., 2022). Metrics, milestones and procedures for reporting are also crucial for ensuring accountability and transparency of the JETP that have been missing (ACF et al., 2022).

The PCC in South Africa played a crucial role in the process to update the NDC, and can do so for the JETP to build trust through recognising different perspectives, articulating and grappling with barriers and political economy, and managing tensions between agility and speed, and participation and legitimacy (Tyler & Mgoduso, 2022). This is important to ensure the needs of those on the ground are reflected in the plan and for the process to fulfil the principles of distributive, restorative and procedural justice outlined in the JTF (PCC, 2022b). Still, questions remain about what meaningful participation would actually need to look like (Life after Coal Campaign, 2022) which appear to warrant deeper exploration and imply the need for a commitment to innovate, learn and adapt in the implementation of the JETP. In the context of the limited duration of the JETP offer, the need to start with implementation is urgent, implying that work starts with what exists, despite participatory failings.

Chapter eight

Unpacking the JETP as a two-level game

8. Unpacking the JETP as a two-level game

This section now discusses the findings of this research based on the review of literature, workshops and interviews, structured and interpreted according to the conceptual approach, Putnam's (1988) two-level game. The intention of this section is to demonstrate how the use of this conceptual approach reveals and explains the emergence and evolution of the JETP. Here it is necessary to characterise the nature of the JETP as an empirical object and the analytical challenges this has presented.

8.1. Domestic factors

The ability of an internationally-negotiated commitment (like the JETP) to build coalitions, seek ratification and build support for implementation at the domestic level, is an important determinant of the agreement successfully navigating the two-level game. Domestic factors play a key role in this respect (Putnam, 1988). The political context is crucial for determining what is and what is not possible. Features of South Africa's political context are elaborated on in the following paragraphs to demonstrate how they have influenced the JETP.

8.1.1. The state of South Africa today. Intersecting crises present opportunities and risks for transitions

The characteristics of South Africa's domestic context today, have been instrumental in shaping the emergence and evolution of the JETP in the country. The South African economy with its low growth rates, and high rates of unemployment, poverty and inequality, and exceptionally high, and unsustainable debt levels, make for an economy in serious need of options to find its way out of the current predicament. At the same time the crisis in the electricity sector, due to an aging and poor-performing coal fleet, a constrained transmission grid, and major overruns in the build and operation of new coal plants, as well as delays to the procurement of new renewables, has led to a situation where the grid can no longer provide security of supply of electricity (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Fakir, 2023; Naidoo, 2022; Tyler & Mgoduso, 2022). So-called load-shedding (repeated episodes of temporary power supply shutdowns) is now a daily reality for South Africans, meaning the grid operator needs to remove up to 6 000 MW of demand from the grid to prevent a total system blackout (O'Reagan, 2023). Households, businesses and industries are without electricity for up to 8 hours a day. Restoring security of supply is imperative for the country to drive economic growth and address the development imperatives of the country. While South Africa is indeed in crisis, the nature of these intersecting crises offers a unique opportunity and attractive investment destination for implementing and funding the types of just transitions required around the world, implementing the NDC, and contributing to the long-term goals of the Paris Agreement. For the electricity sector, this includes the accelerated decommissioning of aging and poorly-performing coal plants, accelerating the deployment of renewable energy, strengthening the grid, and building the

governance capacities to enable this transition. As Fakir (2023) highlights, the JETP could be used as a model for driving the energy transition at scale. This confluence of factors drew the attention of the IPG, seeing South Africa as an appealing investment destination, and illustrated the potential role of the JETP in South Africa, and the possibility for the IPG to fund it (1, 3, 8, 9).

8.1.2. The state of governance in South Africa and capabilities for implementing a just transition

Country governments play a key role in navigating the two-level game, in leading negotiations at the international and domestic levels, brokering consensus and in pushing for implementation (Putnam, 1988). The application of the two-level game has highlighted how the current state of South Africa's government and state-owned entities has been a major contributor to South Africa's intersecting crises, particularly state capture (Bhorat et al., 2017), and is now shaping the evolution of the JETP and its implementation prospects. Eskom, the state-owned utility, has seen a major loss of skills and is battling with endemic corruption and mismanagement and the loss of key individuals, as well as having to service high levels of debt. Added to this, in the February 2023 budget speech, the Ministry of Finance prohibited Eskom from more borrowing to address its debt situation (South African Government, 2023a). All these features are severely constraining the role Eskom can play in guiding the transition of the electricity sector and implementing the JETP (3, 4, 6, 8, 9,). Given that the JETP was originally conceived of as an Eskom-specific deal (11, 12), and that the electricity sector continues to be the centrepiece of the JETP, the current state of Eskom represents a major risk for its implementation prospects.

The deterioration of state-owned entities, like Eskom and others, has been acute over the last decade, during which the corrupt 'power elite', including people located in government, state institutions, state-owned entities, the private sector and the ruling party, the African National Congress (ANC), has engaged in rampant corruption and misuse of political power, contributing to the general decline of the institutions of the state (Bhorat et al., 2017). Added to this are the factional in-fighting within the ANC, and claims and denials in the media that there are turf wars within Cabinet; the year 2024 is an election year and President Ramaphosa will need to balance different views, and at the same time is seeking to secure a second term in office.

In this context loadshedding represents arguably the greatest threat to the ANC maintaining its majority, and therefore a political imperative over the coming year. This confluence of factors appears to be incentivising short-termism in decision making, as the ANC tries to maintain its majority in next year's election (9).

8.1.3. Broad but not uniform support, outstanding concerns and contestation

There is a broad-based recognition that South Africa's economy needs to transition away from its current carbon-intensive structure, to remain globally competitive, and if this transition is to be socially just, it needs to be intentionally guided towards these goals by South Africa itself, with support from the international community (8, 10, 12). And while there is broad support for the JETP and JET IP from a vocal civil society and organised labour, and engaged business and research communities, as well as a compelling evidence base, support is not uniform, and actors have raised concerns about the JETP's process and makeup. The contested political terrain has made for a particularly challenging environment to move ahead with implementation, given the mixed messages from within Cabinet, the lack of clarity around mandates and the turf wars between ministries in terms of their appropriate roles in implementing the JETP. The central role of the Presidency, establishment of the PCFTT and JETP Secretariat, PCC's role in leading consultations and the organisational location of the implementation team established within the Presidency, have been set up to lead a coalition to navigate contestation while moving ahead with implementation. Nonetheless, progress has been slower than anticipated, leading to frustrations within and outside the country (3, 4, 10, 11).

Building consensus needs issues of convergence, what Putnam (1988) terms "synergistic issues", that garner the mutual support of actors at the international and domestic levels. The JETP experience has shown just how difficult this can be, and whilst consensus can be built at a high-level, contestation typically emerges as the process gets closer to implementation, and the material interests of actors in implementation and its impacts become clearer. Building consensus around key issues needs to be supported by robust knowledge which clearly demonstrates how impacts will be managed in a coordinated and well-considered manner, so that social partners can be convinced that they will be well-looked after by the transition. Much work remains to build a critical mass of support, support that is imperative for implementation.

8.1.4. An evidence base offers leverage, and shapes consensus and contestation

Evidence has played a key role in the evolution of the JETP. Importantly this includes the technical work commissioned for the JET IP and also the knowledge created outside the process, particularly the years of work that preceded the JETP and JET IP. This includes the technical and consultative work to develop South Africa's updated NDC, JTF, and studies on just transitions and decarbonisation of South Africa more broadly (ACF et al., 2022). Some notable features stand out. First, it has predominantly been produced by local organisations representing all the social partners. Second, the research has shown areas of convergence and divergence, contributing to which areas of the transition are well supported or conversely, heavily contested. Third, there have been dedicated processes to communicate research findings and involve social partners in interrogating and improving the knowledge base. While knowledge alone is insufficient to drive change and action, it has, accompanied by the aforementioned features, played an important role in enabling the conversation around the JETP that has transpired, and in ensuring it is a South Africa-led agenda and conversation (4, 5,

6, 8, 10). At the same time, the aforementioned processes have included consultative and extensive processes to develop the relevant knowledge and encourage domestic actors to interrogate and engage with the knowledge. These are experiences that the JETP and JET IP could learn from to enhance stakeholder buy-in and build consensus. The role of evidence or knowledge is absent from Putnam's (1988) conception of the two-level game between international diplomacy and domestic politics and would be a worthwhile contribution to the evolution of the framework, a theme which will be returned to.

8.2. International factors

The international context has also been influential in the emergence and evolution of the JETP, illustrating the role of international factors shaping the international and domestic negotiations (Keohane & Oppenheimer, 2016; Putnam, 1988; Renjie, 2021). The world is at an uncertain point with major questions marks around multilateralism, democracy and political stability. There is a growing critique that the Bretton Woods institutions are not fit for purpose to deliver the speed and scale of transition required (ACF et al., 2022). The state of multilateralism under the UNFCCC is increasingly in question given the inadequate international response to climate change, and the failure of industrialised nations to deliver on the promise of \$100 billion a year by 2020 and increasing thereafter. This has created mistrust in the process and between Parties, particularly between the most vulnerable (to the impacts of climate change) and least responsible for the problem of climate change, and those least vulnerable but most responsible for the problem (1, 3).

This mistrust has been exacerbated by some industrialised countries bringing back online previously mothballed coal power stations, due to gas supply constraints caused by the war in Ukraine, and the development of new fossil fuel projects. As a result, these industrialised nations have been accused of hypocrisy, putting pressure on developing countries like South Africa to move away from coal, while at home they are, even if temporarily, moving in the other direction (8, 9). The growing questions around the efficacy of the multilateral process, generated pressure in the lead up to COP 26 in Glasgow, for more ambitious pledges by all Parties, to deliver concrete action and for industrialised countries particularly, to deliver on their finance promises, and to the revival of the 1.5°C temperature goal. The pressure on COP 26 to deliver, led to the high-profile announcement of South Africa's JETP as a potentially innovative instrument for unlocking finance and action towards the 1.5°C goal. In addition, Work Programmes on Mitigation and Just Transitions were established at COP 27 and the deadline of COP 27 drove the process to develop a JET IP in South Africa, which was launched the week before COP 27, and profiled extensively in numerous side events at the COP (4, 5, 6, 11).

But concerns have been raised about the relationship between JETPs and the multilateral process under the UNFCCC, the concern being that they may end up in competition with each other rather than complementary to one another (3, 8). Those more critical of the process fear that the IPG will count the JETP as part of the \$100 billion per year by 2020 goal under the UNFCCC, and are of the opinion that, if anything, only the very small grant financing component in the deal should be counted towards the finance goal (2, 5, 8). Some have raised the concern that by moving outside the multilateral process, JETPs could become a 'race to the bottom', with the principles of common but differentiated responsibilities falling away, and those countries with the fewest investment conditions being the

most attractive destinations and the most successful at unlocking funding through this mechanism (2). It remains to be seen, but the devil is likely in the detail in terms of how JETPs will be counted. These concerns hone in on a tension playing out between a multilateral approach to international cooperation under the UNFCCC, and a JETP-type approach between a smaller collection of countries. While there need not be an antagonistic relationship between these approaches, clarity is needed to decide on how they could be mutually reinforcing, and not becoming a competitive, zero-sum game.

8.3. Different types of actors and their roles

8.3.1. The South African government

At the centre of the South African government's role in the JETP lies the Presidency. Given the poor delivery track record of the state over the last decade, for example in the stalled Renewable Energy Independent Power Producer Procurement Programme (Lawrence, 2020), the proactive involvement of the Presidency in the negotiation and implementation of the JETP, is a sign of political will and commitment to the Partnership. The involvement of the Presidency has also been crucial for encouraging the participation of the heads of state of the IPG members, thereby creating high-level political involvement from all Parties involved in the JETP process (3, 5, 10, 12). Arguably, one of the most important functions of the Presidency has been to establish and lead a pro-JETP coalition within the government, one that holds the political clout and capabilities to overcome opposing forces within the contested terrain that defines the current government (4, 10).

To support the Presidency in leading the negotiation and implementation of the JETP and JET IP, a number of institutional structures were set up, namely the Presidential Climate Finance Task Team (PCFTT), and the JETP Secretariat and Working Groups. In February 2022, the PCFTT was established. It was tasked, along with the Assets and Liability Division of the National Treasury, with assessing the affordability and composition of the JETP offer made by the IPG and its appropriateness for South Africa's regulatory and fiscal environment. The Team would lead negotiations with the IPG, engage development finance institutions and the private sector, and coordinate within South African government (The Presidency, 2022a). Essentially the role of the PCFTT was to convert the political declaration into well-defined modes of support that South Africa could then begin to draw on (12). A joint JETP Secretariat was assembled that would report to the PCFTT and IPG, and housed the necessary technical expertise to develop the JET IP, a process led by the PCFTT. The Secretariat set up the Working Groups with the aim of allowing for the participation of a broad range of South African stakeholders in the development of the JET IP.

The PCC has played a unique role in the NDC Update and JTF and has been core to a country-led approach, through convening evidence-based dialogue to enhance communication and understanding, and build consensus and legitimacy (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Fakir, 2023; Naidoo, 2022; Tyler & Mgoduso, 2022). The PCC's origin and role in convening a progressive discussion and narrative around the NDC, and developing recommendations that gained traction in the NDC process, demonstrated its influence in the space (6). The Presidency requested

the PCC in partnership with the PCFTT to run consultations on the JET IP after it was released, ostensibly to address the pushback against the opacity of the JETP and JET IP processes and to build support for and adapt the plan in line with the priorities of social partners (3, 6, 12).

The Department of Trade Industry and Competition (DTIC) and the Minister of Trade and Industry were instrumental in pushing for a JETP and JET IP that went beyond an electricity sector deal, to include, so-called new energy vehicles (NEVs), drawing on a body of evidence, most notably developed by the research organisation, Trade and Industrial Policy Strategies (TIPS), another influential domestic knowledge producer (4). As a key employer and exporter, the rationale for including the sector, was the need for support to transform the sector from manufacturing internal combustion engine vehicles to electric vehicles, thereby protecting future jobs and exports. Furthermore, the decarbonisation of the transport sector is required to meet the decarbonisation targets of the 2030s as outlined in the NDC (4, 8). The DTIC actively pushed for the inclusion of green hydrogen in the deal, which is one of the more contested areas of the JETP.

The Department of Mineral Resources and Energy (DMRE) under the leadership of Minister Gwede Mantashe has been a vocal critic of the renewable energy sector and just energy transition initiatives within the South African government (DMRE, 2021). The pro-coal narrative driven by the Minister, and resistance towards the accelerated deployment of renewable energy through the REIPPPP, has slowed down the transformation of the electricity sector, and undermined confidence in the JETP and its implementation prospects (3, 4). The Presidency, and not the Minister of the DMRE, enacted the amendment of the Electricity Regulation Act (4 of 2006) which raised the threshold for licensing requirements for embedded generation from 1 MW to 100 MW. While the Presidency has seemingly sought to build a coalition to get around the Minister Mantashe, Mantashe has been a crucial political ally for President Ramaphosa throughout his Presidency.

Amidst the Phala Phala scandal (which revolves around alleged procedures pertaining to the theft of hidden foreign currency at a game farm belonging to Ramaphosa) and public debate on the effectiveness of President Ramaphosa in his first term in office, some insiders voiced the opinion that his re-election would require the support of Minister Mantashe, with the implication that Ramaphosa has been unable to remove Mantashe as Minister of the Mineral Resources and Energy. So despite the minister speaking in direct contradiction to the Presidency's plans for the electricity sector, and endangering deals like the JETP, the President is thought to lack the ability to bring Minister Mantashe in line. The appointment of a Minister of Electricity within the Presidency is perceived to reallocate decision-making power to the Minister of Electricity. In April 2023, with the electricity crisis worsening and winter approaching, the new Minister of Electricity, Minister Ramakgopa tabled a new proposed plan in a Cabinet meeting to address the crisis (Erasmus, 2023; Khumalo, 2023). The main tenets of the plan were to address the issue of sabotage of Eskom power stations, to increase the performance of existing plants and extend the life of coal plants nearing decommissioning. In addition around R30 billion was proposed to be set aside to procure diesel supplies for emergency open-cycle gas turbines, and maintenance would be reduced during times of peak demand. Furthermore bid round 7 of the REIPPPP was to be fast-tracked, in the form of a mega 15 000 MW bid round which would prioritise areas with grid capacity, most notably the North West, Limpopo and Mpumalanga. Lastly, Minister reported that the government was in negotiations to import 1200 MW of power from Mozambique (Erasmus, 2023; Khumalo, 2023).

Some analysts fear that the short-term focus of the Minister of Electricity's plan may put South

Africa in a worse position in the medium term. Specifically the expense of diesel as a short term supply option will add to Eskom's debt, delayed maintenance would further worsen the performance of the existing coal fleet, and the life extension of coal would create mixed messages and cause uncertainty, particularly for international partners of the seriousness of South Africa's commitment to decarbonisation; this would likely have implications for securing future tranches of finance from the IPG and other industrialised nations (Erasmus, 2023; Khumalo, 2023). Making desperate short-term decisions to secure power at all costs to address the power crisis in the short term is a political imperative with the national elections approaching next year, but worsening the longer-term outlook for the sector and power crisis (1, 3, 4, 5).

Progress in addressing the electricity crisis and in transforming the sector, is being reportedly hindered by turf wars playing out within the Cabinet, most notably between the Minister of Electricity in the Presidency, the Minister of Mineral Resources and Energy, and the Minister of Public Enterprises (Tandwa, 2023). In his State of the Nation Address in February 2023, President Ramaphosa when appointing the Minister of Electricity indicated the Minister would lead the work of the National Energy Crisis Committee and receive the necessary powers to carry out his mandate to address the electricity crisis (South African Government, 2023b). However, there has been strong opposition coming from the incumbent Ministers of the Department of Mineral Resources and Energy (DMRE) and Department of Public Enterprises (DPE). The President's inaction has even caused the Secretary General of the ANC, Fikile Mbalula to call on the President to address these turf wars or face disciplinary action from the party (Hunter, 2023; Tandwa, 2023). In response, the President released a statement after the NEC's endorsement of the Minister of Electricity's plan, stating that South Africa needs to address the energy and climate crisis simultaneously (South African Government, 2023c). Some consider the press release to be more evidence of the President's inability to exercise his power, instead trying to make the case that all the interests around the table can be met. Examples of the inconsistencies are the President proposing that in the short term Ramakgopa's plan can be carried out, but that the long-term trajectory and target remains the same. Specifically, the President poses that in pursuing these actions the country can still achieve the upper bound of the NDC, which he suggests is in line with 1.5°C (The Presidency, 2023). But there is risk that the short-term focus is likely to worsen the medium-term prospects and put both medium and long-term goals of energy security and decarbonisation out of reach. Furthermore, only the lower bound of the NDC gets close to 1.5°C compatibility, whereas the upper bound goes well beyond this. In addition, the JETP voices its support for the most ambitious version of the NDC, which the upper bound is not.

Contrastingly the recently released recommendations of the Presidential Climate Commission (PCC), show a more ambitious proposal for an Energy Action Plan, with a longer term focus. Recommendations include accelerating the establishment of an independent transmission company, aligning the JTF and JET IP, updating the 2019 Integrated Resource Plan for Electricity, incentivising embedded generation and working towards the net zero emissions goal (Creamer, 2023; PCC, 2023).

The Ministry of Finance is arguably the single most important player for all deals related to public finance, and the National Treasury's Assets and Liabilities Division has worked alongside the PCFTT to determine the suitability of the JETP for South Africa's fiscal reality. The JETP was developed through the international process on climate change. One of the shortcomings of international diplomacy for climate change, is that it typically involves finance ministries to a limited extent, instead prioritising the participation of ministries of environment and foreign affairs. While the proactive participation

of the Department of Forestry, Fisheries and the Environment (DFFE) and their role in driving an updated and ambitious NDC was important for the Partnership, the DFFE does not have the mandate to determine how public finances are spent. A concern highlighted by interviewees inside the process was that while the Ministry of Finance was involved in the process, the bias with the international negotiations is that they seek to deliver commitments and agreements but lack the necessary mandate and competencies that the Ministry of Finance holds, to move from commitment to implementation in a shifting domestic political context. The Ministry of Finance has raised several red flags, in terms of the nuts and bolts of implementation and the suitability of the instruments offered by the Partnership given the state of public finance in South Africa (3, 7). Addressing these concerns will be vital for enhancing the design of the JETP and its implementation prospects.

A last critical actor within government is provincial and local government. Given how the transition will impact different parts of the country, in very different ways, strong leadership will be required from local and provincial governments to guide transitions in the most beneficial directions possible. But many of these governments are poorly capacitated and resourced, and are struggling to deliver on their current mandates. The transitions will require them to perform more complex forms and functions of governance, the capacities for which still need to be built, and represent a key part of the institutional capacity building project for the South African government (3, 6, 11).

8.3.2. Eskom

One of the early conversations that informed the development of the JETP started was around a deal to address the debt situation of Eskom, and to enable the company to play a role in the accelerated decarbonisation and transition of the power sector (Steyn et al., 2021; Tyler & Mgoduso, 2022). Given the current electricity crisis in South Africa, the role of Eskom in addressing energy security through a transition, is central. But the current state of Eskom, with major corruption and mismanagement issues, and the departure of arguably the two most instrumental individuals in driving the conversation around Eskom's own transition and its role in the broader transition, former CEO Andre de Ruyter (in March 2023) and former head of sustainability Mandy Rhambaros (in October 2022), has raised concerns about the future participation of Eskom, posing a major threat to the JETP (4). Furthermore, the announcement by the Minister of Finance in the February 2023 Budget Speech, that Eskom may not take on additional loans for the next three to five years, was a major setback for the prospects of Eskom playing a leading role in driving the attainment of the JETP goals (4, 6, 7, 8). This significantly changes the role Eskom can play in the transition and has implications for the participation of actors, such as from the private sector. Added to this is the uncertain timing of the establishment of the transmission grid company, which should be finalised in the course of this year, as part of the unbundling of Eskom required as a condition in the JETP. This along with broader challenges in the organisation, are casting doubt around Eskom's future in the deal.

8.3.3. IPG

Each member of the IPG has a long history of bilateral engagements with South Africa, and have expressed frustration at the delays in the reform and development of South Africa's electricity sector that they have sought to support. The JETP offered the possibility for a more coherent approach between the countries, to unlock more money than otherwise would have been possible, and to unblock some of the impediments to progress that the IPG have encountered working in South Africa over the last decade (3, 4). While the makeup of the JETP has been criticised, particularly by civil society, for being too heavily in line with the interests of the IPG and not enough in line with South Africa's interests, particularly those of communities and labour (1, 2), the focus areas seem to have been determined by domestic processes and actors (3, 8). The priorities of the IPG are more observable in the quality of the finance they have provided, and the distribution of financing allocated to the focus areas and different elements, as is observable in the makeup of the JETP.

IPG priorities' shaped the features of the deal

Priorities from the IPG for the deal included implementation of the most ambitious version of the NDC to align South Africa with 1.5°C and a mid-century net zero carbon emissions target. The focus of this decarbonisation imperative is on the electricity sector. The priorities for the IPG in the electricity sector include accelerating the decommissioning of coal and deployment of renewable energy, strengthening the transmission grid, addressing Eskom's debt problem, unbundling of Eskom, most urgently to have an independent grid company, and the growing liberalisation of the electricity market (3, 4, 5). This also speaks to the fact that with its aging and carbon intensive electricity infrastructure, South Africa represents an attractive investment destination for the IPG, in terms of money invested and carbon emissions reduced, and has been at the core of the IPG's interest and involvement in South Africa's transition (8). However, South Africa is classified as an upper middle income country which determines what funding they are eligible for, and the instruments donors can use, placing restrictions on the composition and financial architecture of the JETP (1, 3, 4).

One of the biggest criticisms of the JETP is that even if the loan terms are better than what South Africa could otherwise access, the quality and quantum of the funding is still inadequate, with a low grant-equivalent component and a small portion of the funding allocated to the social justice elements of the transition, foreign currency-denominated loans building in currency exchange risk, and that it representing only a small fraction of the overall just transition investment need (1, 2, 5 - 12). But there were also concerns expressed about the posture of the IPG, wanting to get the best deal for the lowest price, offering funding for the most attractive elements of the transition, but unwilling to provide substantial funding for the more difficult elements of the transition, such as addressing social justice issues (ibid). Furthermore, there was criticism of the IPG communicating that South Africa's JETP was competing with limited resources available for JETPs in other countries, and therefore, should South Africa not show requisite progress, the funds would be channelled elsewhere. This feature was criticised, indicating a more collaborative approach could have been adopted, but is a sentiment symptomatic of the broader impasse between industrialised and industrialising countries in the UNFCCC. There was also a concern raised that the IPG went to efforts to keep it an exclusive group, resistant to the participation of other potential funders, forcing South Africa to negotiate with these in separate bilateral deals, rather than crowding them into the JETP, which would have aided the scaling and catalytic effect the deal ostensibly claims to be promoting (10).

The package itself was criticised for being a collection of very different instruments, that in reality cannot be summed together to arrive at a coherent total, as like is not being added with like. There were also criticisms over only a portion of the funding being legitimately additional, with other parts essentially repackaging of existing agreements or based on “grand assumptions” (11). And despite the IPG’s commitment to mobilising finance beyond the \$8.5 billion we find little evidence to verify delivery of the finance. Dynamics between the members of the IPG were also the subject of critique, with an interviewee inside the process raising the lack of political cohesion between members as a challenge for the process from the position of the PCFTT. This resulted in quite different offers by IPG members, with Germany and France’s offers perceived to be the most ambitious, followed by the EU (11). The UK and US’s offers were the least favourably perceived, given their reliance on commercial loans and guarantees (11). Lastly, a tension that played out throughout was the IPG wanting more granularity about South Africa’s finance need before the IPG were to provide more details on the offer, whereas South Africa wanted to see the ‘colour of the money’ (or nature of prospective finance options) to inform the granularity of the need they could communicate (11, 12). Ultimately it was South Africa that showed their cards first by producing the JET IP; equivalent detail of the IPG’s offer is still yet to be made public.

IPG updates reveal an uneven picture

In June 2022 and December 2022 the IPG released progress update reports on the JETP. These are useful reference sources as they provide insight to what the IPG agreed constituted the progress achieved by the JETP after 6 and 12 months. The 6-month update covered building an enabling environment, governance structures, the role of the JETP Secretariat and its working groups, finance package, JETP-linked initiatives, and the outlook and milestones for the following six months. What is striking about the update is that the overwhelming focus is on the work South Africa did under the aforementioned features over the six month period. Information on the work of the IPG is limited to the finance package, in which the progress update indicates the IPG has provided more detail about the finance instruments that the offer consists of to the PCFTT (IPG, 2022). None of the details were made available to the public (Blended Finance Task Force & Centre for Sustainability Transitions, 2022; Fakir, 2023; Naidoo, 2022; Tyler & Mgoduso, 2022).

Similarly, the 12-month update focused on domestic progress in South Africa in terms of the development of the JET IP and recent policy developments. While a short section was provided on the finance package, very little new information was provided about the details of the IPG’s offer. A short section was also provided on potential support from the third sector and private sector (UK FCD0, 2022).

Given that the PCFTT provided their own public updates on domestic progress in PCC meetings, it seemed misguided that the IPG focussed their progress updates on South Africa’s domestic progress. Given the concerns around the details and transparency of the IPG’s offer and its status raised by numerous constituencies in South Africa, a more granular reporting from the IPG would have done much to address these concerns (PCC, 2022a). The lack of transparency and detail provided by the IPG suggests a concern that has been raised throughout the lifetime of the Partnership, that disproportionate reporting burden and responsibility is being placed on South Africa, and a reciprocal type of dual accountability is lacking from the IPG (11, 12). Addressing this shortcoming would go a long way to building trust in the Partnership. Conversely the continued lack of transparency is the source of mistrust of the IPG and of the authenticity of their offer (11, 12)(PCC, 2022a).

Elements of innovation?

Some have raised the concern that the JETP is a cluster of bilateral deals not really a coherent package that is needed to scale its impact, and deliver a new form of support (1, 6, 8). Another feature that has been missing is to establish the partnership, as more of a peer-to-peer cooperation, in which the countries involved can share lessons. Countries in the EU have been working towards energy transitions for close to 50 years, and have experiences to share about what has and hasn't worked there. But this type of peer-to-peer learning has been almost absent from the JETP conversation, instead exhibiting the more traditional ODA arrangements, in which donor countries set the terms for support, rather than facilitating a two-way exchange and dual accountability (3).

Despite the criticisms, elements of innovation in the JETP were acknowledged. A non-trivial feature was that in offering a package rather than a collection of the typical bilateral deals, the JETP enhanced the coherence of the funding between IPG members in terms of focusing on three areas for investment, increased the scale, streamlined the negotiations, and aimed to reduce the transaction costs and reporting burden for the South African Ministry of Finance (4, 10). Such a package may have been difficult to mobilise in the absence of the JETP. It also helped to generate momentum domestically in South Africa, and galvanise the country and its social partners to work on developing a JET IP and the institutional capabilities to implement the JETP. Lastly, the JETP provided a country-led platform, through which South Africa, and more generally developing countries can approach industrialised countries with a mechanism for funding their transitions, thereby putting pressure on industrialised nations to be accountable and deliver on the financial promises they have made through the multilateral process under the UNFCCC (7, 10). This then links to a broader point about dual accountability and shared responsibility. This research has assessed the JETP from a domestic perspective, highlighting influential domestic features in South Africa for the process. This decision was driven by the intention to offer a granular country perspective, and because access to the dynamics shaping the IPG's decisions and behaviour is relatively more limited. But this decision does not intend to imply that the burden of responsibility for delivering an impactful JETP should be disproportionately borne by South Africa. Instead the prospects of the JETP are reliant on the commitment of both South Africa and IPG, and both will need to work hard if it is to be a success. A focus on the dynamics shaping the decisions and behaviour of the IPG is a valuable area of future research which has been started by von Lüpke (2023) and others.

8.3.4. Social partners in South Africa

By virtue of the way the JETP was negotiated, most of the social partners were excluded from the process, and only able to engage with the process once the political declaration was announced, which, as has been mentioned (in sections 5.1 and 7.3.1), created pushback. This represents how the JETP was negotiated and agreed on at the international level, as conceived by Putnam (1988), and was only brought to the domestic level after the fact, leading to contestation from domestic actors. Civil society's most prominent role has been demanding accountability from the South African government and IPG, in terms of finance quality and allocation, appropriateness of investment focus areas, holding up essential justice principles and elements, and other forms of ownership (beyond state or private ownership) to ensure the JETP does not become simply another profit-focused infrastructure plan. Civil society has been vocal about their criticism of the JETP and JET IP process, expressing that

consultation did not happen in case of JETP and was problematic (in that it was shallow and rushed) in case of JET IP (1, 2)(Hallowes & Munnik, 2022; LAC & FFCSA, 2022b, 2022a). They have also been critical of the focus areas, questioning whether the benefits of green hydrogen are more aligned with the IPG's interests than South Africa's. While this may be true, the focus areas seem to have been decided on domestically, and therefore the question is which domestic interests pushed for the inclusion of green hydrogen, and why? In this regard there is concern that big business interests like those of Sasol prevailed, and now there is concern that the private sector may receive a portion of the JETP funding, a notion strongly opposed by civil society representatives (1, 2, 8). The NEVs focus area has also been criticised by parts of civil society, arguing that, with no apparent focus on public transport, this focus area will fail to adequately deliver on the social justice questions it should (1, 2).

Perhaps most criticised by civil society has been the lack of attention the JETP paid to the justice elements, in the process, in the consultations, and the quantum and allocation of funding (1, 2). Some of these criticism have been fleshed out by the report "Contested Transition: State and Capital against Community", a report published by GroundWork (Hallowes & Munnik, 2022). On the one hand there is a scepticism from some parts of civil society and labour of the growing role of the private sector in implementing the JETP, with opponents citing the concern that the electricity sector will be privatised, with the result that affected labour and communities will be left behind by the transition. At the same time, there is a view that given the state and major constraint of public finance in South Africa, the private sector will need to play a major role (Intellidex, 2023). This may well encounter pushback, but might be necessary for securing and spending as much of the \$ 8.5 billion as possible during this initial phase of three to five years since the initial political announcement (7).

The South Africa media has elevated the prominence of the JETP in the national discourse by covering the evolution of the process, along with the JET IP, and how the rapidly changing domestic policy and political context is influencing the prospects of the JETP. This has increased public awareness of the deal, facilitated the involvement of a diversity of perspectives and shone a light on the need to hold the South African government accountable to its policy decisions, particularly those in contradiction with the NDC, JTF, JETP, JET IP and just transition as a whole.

Organised labour has been vocal about the position of their workers in the transition, pushing for a jobs guarantee for their workers, and putting pressure on the process to demonstrate how workers livelihoods will be protected and improved by the transition. This raises the importance of economic diversification and skills development and commensurate support for these. Other key issues raised were concerns around the privatisation of the electricity sector, calling for the continued role of state-owned entities in providing renewables, and alternative options such as community-owned renewables, an option supported by civil society too (COSATU, 2022)(9). Organised labour represents a diverse group of actors, organised according to diverse sectors, and therefore how the transition impacts on their interests is particularly disparate. This can make it difficult for organised labour to speak and negotiate with a unified voice.

Research, particularly research produced by South African organisations including universities, think tanks, research institutes, civil society organisations and business, has proved to be a crucial ingredient in the making the case for a just transition, and in supporting its implementation. Part of this includes the technical work commissioned directly for the JET IP, the NDC update, JTF, as well as many other studies that have been produced by local researchers in recent years. This knowledge

base has been a key enabler for establishing a national, evidence-based conversation about just energy transitions in South Africa, for building consensus and addressing contestation. While evidence alone cannot resolve contestation, accompanied by skilful brokering work and compelling storylines, it has been shown to be capable of pushing the conversation ahead, and building support for the transition.

8.3.5. A two-level game for actors

The JETP experience has illustrated how it is a two-level game for both South Africa and the IPG members. While the focus has been on the IPG and South Africa at the international level, and the dynamics shaping the domestic level in South Africa, future research could build on this contribution by examining the domestic dynamics influencing how IPG members operate in the JETP. For effective international cooperation, scrutiny is required of all players involved, not just of the countries receiving funding, as is so often the case. At the international level the JETP appears to have been driven by progressive climate factions within the IPG and in South Africa, pushing for ambition. They have done so by using the carrot of climate finance and transition-related opportunities; and the stick of carbon border adjustment mechanisms and other transition risks. While this strategy and coalition of actors was successful for delivering a political declaration, their efficacy in implementation will become apparent in due course.

8.4. Delivery and implementation

Putnam (1988) highlights that the international credibility of a negotiating country is a key ingredient for reaching favourable international agreements, and that it is reliant on the country's ability to deliver action domestically. This then raises the importance of implementation progress for securing the most beneficial form of JETP (e.g. level of concessionality, size of grant component, finance allocated to justice elements) in current and future tranches.

Given the lack of a NDC implementation plan, arguably one of the most important contributions of the JETP has been its contribution to the conversation about the implementation of South Africa's NDC and just energy transition. South Africa has a poor recent track record of delivery and implementation of megaprojects in the energy sector and beyond, and of climate policy generally (1). The JETP offers a useful test case of the type of integrated implementation that will be required for the implementation of the NDC and energy transitions. This raises more complex logistical questions and questions around mandates, that the typically siloed implementation within government departments has not had to deal with but is a core implementation challenge for just transitions (10).

The PCFTT which was in operation from February 2022 to December 2022 only had 10 months to do their work to lead negotiations on the JETP and deliver a JET IP, after which it along with the Secretariat was disbanded. Some members of the Secretariat now form part of the Project Management Unit, assembled in the Presidency to deliver implementation of the JETP. Ultimately, implementation will depend on actors beyond the team that has negotiated the JETP, and will rely on players like line ministries,

Eskom, local governments and communities (12). While the JET IP essentially articulated the ‘what’ of the transition, an implementation plan is currently under development and will communicate the ‘how’ of implementation of the JET IP, and is expected in October 2023 (12).

The need to see more progress on policy reform and implementation was identified as a priority, given that the lack of delivery in South Africa, which has been a feature of the last decade, is a major hindrance to progress of the just energy transition in South Africa and future funding from the IPG and beyond (3, 6, 7). This then resonates with Putnam’s (1988) proposition that to maintain international credibility, which South Africa will need to make a success out of the JETP and to negotiate future tranches, it will need to show an ability to deliver progress in implementation. Serious question marks still remain over the JETPs implementation prospects. Part of this is the need for some quick wins to build support for the JETP domestically. For example, the unbundling of Eskom could unlock the scale and speed of private sector investment needed and the recent announcements that the independent transmission grid company may be operational before the end of 2023 could act as an important catalyst in this respect (6, 7, 8). Eskom’s role is crucial but precarious, given changes in key personnel and the national budget speech announcement that Eskom is not allowed additional borrowing for the next 3 years which is potentially a major constraint on the role that Eskom can play in the implementation of the Partnership (4, 6, 7). Furthermore, the pressure and political threat of loadshedding in the run-up to the 2024 national elections might be leading to finding ways to supply power regardless of the trade-offs, leading to decisions in the short term that are contrary to the JETP objectives. The recent announcements from the Minister of Electricity seem to suggest this is a real dander (5)(Khumalo, 2023).

A number of the concerns around implementation relate to the need for institutional capacity building and the contribution the JETP could make, for building these types of capacities. Dubash (2021) highlights the important role of climate institutions in shaping politics and outcomes. Questions around institutionalisation then relate to building the ‘muscle’ of government for the type of implementation required by JETPs and just transitions in general. The JETP so far has demonstrated the work that remains in this regard.

Building institutional capacity, is needed across the board, perhaps most desperately in local governments in South Africa, where capacity and resources are even more limited than at the national level. Given the role of municipalities in implementation of the JETP and broader just transitions, they will need to be a focus of support for building the requisite capacities and transitioning business models, so that they can proactively participate and shape the trajectory of these transitions, in their areas, for their communities (5, 6). This will include tackling some of the most complex elements of the transition, the social justice elements. But the theme of capacities is not only relevant for local governments, but also in terms of the absorptive capacity in private and public sector, with some seeing this as a major constraint of progress, constraining the change possible over the next three to five years (7). This also speaks to the ability of the public and private sector to accommodate the potential catalytic role of JETP, by absorbing the additional resources that would be unlocked (8). Given the scale and speed of change that needs to happen, and the profound social and economic transformations and implications that need to be managed, and the current poor implementation track-record in the country, the existing capacities represent a potential bottleneck and will need to be addressed to improve delivery and build confidence for attracting future tranches of funding (1, 4, 6, 8, 10)(ACF et al., 2022).

An important theme that has emerged for implementation is the inadequate transparency and reporting on the progress of the JETP. This has created mistrust and means the public is not aware of some of the progress that has been achieved nor of the challenges and complexities that have been encountered. A granular and up-to-date view of the current status of the JETP, communicated predictably and regularly, would help to build trust, support and momentum (11, 12). Communicating a transparent and granular picture may also help to establish a more nuanced and balanced conversation around the JETP, moving the conversation away from polarisation which has at times been a feature.

Given the challenges encountered, fears have been expressed by interviewees that the pendulum has swung in the favour of the forces opposing the JETP, given the delays and lost momentum, and the concerns around new and additional finance not being delivered by the IPG (11, 12). On top of this, there are growing concerns, South Africa's position of non-alignment with or against any major power bloc involved in the war in Ukraine might be a source of tension between South Africa and the IPG, to the detriment of the JETP, and with negative implications far beyond (4).

8.5. Is the JETP evolving and living up to expectations?

So, is the JETP delivering on its expectations? To explore this question it is worth turning attention to the JET IP. The conversation around the JETP and JET IP are often conflated, and while they are of course related, with the JETP committing a small slice of finance for the JET IP, it is important to note that they are distinct, and therefore analysis needs to represent this distinction and the interaction between the two. The JET IP did crucial work to lay out in detail what the broader just energy transition will require over the next five years in South Africa. It lays out important principles for justice and for finance, and outlines prioritisation criteria in each sector. This is all crucial work to lay the foundation for a just energy transition in South Africa and to guide the design and implementation of the JET IP. But what is far less clear is how the work of the JET IP has influenced the evolution of the JETP, if at all, and whether the work of the JET IP has translated into an offer from the IPG that mirrors the important principles and objectives of the JET IP. Given the limited reports on progress in either JETP or JET IP (IPG, 2022; UK FCD0, 2022), it is difficult to make an assessment. But there is little evidence available to suggest that the substantial domestic process and technical work underpinning the JET IP has actually informed the evolution of the JETP so that it is better suited to the South African reality than was the loose political declaration that was announced at COP 26. Instead, the JETP appears to have remained suspended, at times paralysed, showing little evolution. This paints a concerning picture of a lack of willingness of the IPG to be influenced by the considerable work that has happened domestically in South Africa and which seems to be playing out in the slow-starting implementation of the JETP.

Chapter nine

**Reflecting on the
usefulness and
appropriateness of the
two-level game**

9. Reflecting on the usefulness and appropriateness of the two-level game

So what can be learnt about the JETP from Putnam's (1988) two-level game? Is it useful? What are its limitations? This conceptual approach has offered a structured set of concepts to organise the data collection and interpretation. By isolating this set of concepts, it has helped explain how they influenced the JETP.

The interaction between international diplomacy and domestic politics opened a window of opportunity for accelerating the conversation around the implementation of South Africa's NDC and just transition. The decision of the South African Presidency to surge ahead, brokering an international agreement with limited domestic participation has caused pushback and served as the grounds for opposition against the JETP. Building consensus, around issues that both international and domestic actors can get behind, has proved to be challenging in terms of the selection of those issues or focus areas, their priorities and how they are implemented. Such issues need to be accompanied by compelling storylines, robust knowledge, and clear communication of how impacts will be managed so that sectors and workers at risk benefit from the transition. The Partnership still has much work to do in this respect.

For South Africa to maintain its international credibility, which is much-needed currency to negotiate favourable international agreements like future tranches of the JETP, it needs to implement, and do so now. The paralysis and implementation failure specific to the JETP and beyond, which South Africa is in the grips of, is a serious issue that needs to be addressed, and a threat to the country's international credibility. Similarly, the IPG need to undertake efforts to support accelerated implementation by holding up their side of the deal and making real money available. The longer the paralysis persists, the more likely the transition will be inadequately managed and unjust, or this window of opportunity for meaningful cooperation will close.

Reflecting on some of the limitations of the framework, the closed process to develop the political declaration and continued opaqueness in the evolution of the JETP has made unpacking and explaining its evolution challenging. This is a finding in itself. Namely, that a greater commitment to transparency is required for future JETPs. The unfolding and highly unpredictable status of the JETP also means explaining which influences are winning out is challenging, as it is still highly uncertain. Still, this research hopes that it has provided useful insights to shaping the evolution of the JETP in South Africa, its future iterations and those of other countries.

Putnam (1988) established the framework in a classical international diplomacy context. One feature that appears to be lacking is the material and financial incentive of this game. In this respect, the experience and literature on official development assistance (ODA) can offer valuable insights that can enrich the theory of the two-level game. This includes features such as finance, capacity building and grant making, the relevance of which for JETPs are highlighted by von Lüpke et al. (2023). Notably, ODA rules govern the actions of investment partners and are relevant in terms of what they can and cannot do under JETPs. At the same time, JETPs may represent innovation in design that is capable

of pushing and extending what is possible under the ODA rules. Importantly, JETPs need to be made up of new and additional financing, not be a repackaging of existing finance.

The lack of acknowledgement of the role of knowledge in Putnam's (1988) framework is somewhat surprising. This has become a major theme in climate policy, not least of all due to the decades of work of the IPCC to ensure negotiations and decisions are evidence-based. In the same vein, the commitment of South Africa to evidence-based national discussions in the JETP, JET IP, NDC, JTF and others, has demonstrated the critical role played by knowledge, robust knowledge produced by domestic policy actors to build trust in the process. This is an area to incorporate to extend the framework, and is a finding that could provide guidance for other countries' JETPs and how to use knowledge, how it is created and who it is created by.

Another emerging gap that requires attention, is institutional dimensions of the JETP. A dedicated set of institutions such as the PCFTT, JET Secretariat and IMC, were established for the JETP that worked with well-established institutions governing bilateral agreements between industrialised and recipient countries, and well-established country institutions. But the gap is in linking the institutions governing bilateral arrangements and those within countries, to strengthen dual accountability, and institutionalise progress of JETPs. Importantly institutions need to fit the objectives they seek to achieve (von Lüpke et al., 2023). The JETP has ambitious aspirations which require commensurate institutions, which have not been identified. While there is a high-level commitment from the President and the heads of state of the IPG countries, the institutional infrastructure to back this up is not there, which presents a risk for the long-term prospects of the JETP. The JETP may need to define common policy objectives, values and institutions, between South Africa and the IPG, to unlock tangible progress. The rich body of literature on varieties of climate governance and institutions such as Dubash (2021) and Tyler and Hochstetler (2021) could serve as a key resource for strengthening the institutional dimensions of the JETP, a finding also relevant for informing the institutional development of other countries' JETPs.

The JETP experience has illustrated how this is a two-level game for South Africa and the IPG members. As the focus of this study has been on the interactions between the IPG and South Africa, and the domestic dynamics in South Africa, examining the domestic dynamics that the IPG members are operating according to in the JETP, would be a valuable future research contribution. There has often been the tendency with analysis of international cooperation to focus predominantly on the countries receiving funding. But effective international cooperation requires the scrutiny of all players, to which future research can make an important contribution.

Chapter ten

Conclusions

10. Conclusions

A studying of the JETP process has revealed its complexity, multi-layered nature, and the role of process in determining the provision of finance, enabling participation, and determining whether it is fit-for-purpose. It has also illustrated the contested nature of a process that seeks to represent diverse interest groups. Limited attention in the literature has been paid to process, which is a gap that needs to be addressed as part of the efforts to enhance the current JETP, attract future tranches, and build country ownership.

The JETP has brought together a set of actors through a unique partnership, which has allowed them to engage in ways that depart from familiar, business-as-usual ways of relating. South Africa's NDC, pre-existing work on finance mechanisms for just transitions in South Africa, combined with international pressure of COP 26 opened the door for the JETP in South Africa. The JETP offered a way to overcome familiar deadlocks internationally, and domestically but still encountered challenges to do with domestic politics including turf wars between ministries, the interests associated with general elections, and the electricity crisis. Similarly familiar challenges from the international perspective emerged such as lack of transparency around the funding provided, the quality and quantity of the finance, and reluctance to provide details about the finance. In a sense, the JETP has provided a country-led platform, through which developing countries can approach industrialised countries with a mechanism for funding their transitions. This could help to direct industrialised nations to deliver on their financial commitments.

The role of locally produced knowledge was a strong feature of the process, drawing on the relevant knowledge base that had been developed in-country prior to the JETP, and mobilising domestic expertise and knowledge to develop the JET IP. This has enabled a granular and evidence-based, national conversation, that has been important for building support and engaging on areas of contestation.

Inadequate transparency and reporting both from the IPG and from South Africa has made the progress of the JETP opaque for domestic stakeholders, leading to questions about whether it will deliver tangible outcomes and causing mistrust in the process. Regular, and detailed reporting to the public to foster dual accountability between the IPG and South Africa would help to showcase the work being done, progress being made, challenges encountered, and ultimately help to build trust in the Partnership.

The work invested by South Africa to develop a detailed JET IP, followed by consultations, has showcased South Africa's efforts to drive progress in the JETP and just transitions more broadly. It has helped to bring granularity to the conversation about the finance needs, and defined an initial set of Just energy transitions principles and country priorities. Progress with the JET IP and policy reform in South Africa have been notable and the country has communicated advancement in these areas. But there is limited evidence of whether the JET IP has driven the evolution and adaptation of the JETP. For international cooperation to work effectively, all parties need to be exposed to the same level of scrutiny. The IPG has provided little detail to the public about the offer, with progress updates mainly focused on what South Africa has done. This needs to be remedied to ensure the burden of responsibility and commitment to the Partnership is borne equally by South Africa and the IPG.

The JETP and JET IP have accelerated the conversation about the implementation of South Africa's NDC, raising critical questions that the country has not been able to address. The success of the JETP and the country's ability to attract future tranches of funding from the IPG and other countries, and its capability to attain the targets of the NDC set for this decade hinge in South Africa's ability to deliver on implementation. This conversation is shining a light on the work that still needs to be done inside and outside of government to build the types of capabilities and strengthen institutions needed to drive implementation.

JETPs offer a promising new way to invest in decarbonisation and low-carbon industrialisation but need to be improved to fulfil their potential. The JETP challenges are also indicative of the broader challenges of translating ambitious international commitments to domestic implementation that has high levels of ownership and support. This is an area that the JETP and the multilateral process as a whole need to focus efforts on in this critical decade for climate action (Roy et al., 2021).

We hope this study has provided usable insights for other countries, to inform their own versions of JETPs, highlighting risks and opportunities, and learnings. How the JETP in South Africa and other countries will play out remains to be seen. Work remains to turn JETPs into the types of instruments needed to support just transitions in the Global South, in this decade of implementation.

Chapter eleven

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11. References

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