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Power, Inequality and the Limits of Climate Reform: Rethinking South Africa's Just Transition

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2026
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https://hdl.handle.net/10539/48488
Olver, C. 2026. 'Power, Inequality and the Limits of Climate Reform: Rethinking South Africa' s Just Transition. SCIS Working Paper, Number 77. https://hdl.handle.net/10539/48488

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SCIS Working Paper | Number 77

Power, Inequality and the Limits of Climate Reform: Rethinking South Africa's Just Transition

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Contents

Acronyms....3
Abstract....4
Political Settlements Theory and its Relevance to the Climate Transition....5
The Political Economy of the South African Transition....7
The Emergence of a Social Compact around the Climate Transition (2010 –2018)....10
Peak Climate Ambition and Consensus (2018 – 2022)....13
Contestation and Fragmentation (2022 – 2025)....16
A New Climate Equilibrium (2025 Onwards)....20
Conclusion: Prospects for Inclusive Climate Governance and a Just Transition....22
References....24

Acronyms

ANC	African National Congress
BBC	Black Business Council
BEE	Black economic empowerment
BUSA	Business Unity South Africa
CBAM	Carbon Border Adjustment Mechanism
COP	Conference of the Parties to the UNFCCC
COSATU	Congress of South African Trade Unions
CSIR	Council for Scientific and Industrial Research
DEA	Department of Environmental Affairs
DFFE	Department of Forestry, Fisheries and the Environment
DoEE	Department of Electricity and Energy
DMR	Department of Mineral Resources
DMRE	Department of Mineral Resources and Energy
DPME	Department of Performance Monitoring and Evaluation
ESG	Environment, Social and Governance
GNU	Government of National Unity
IRP	Integrated Resource Plan
JET-IP	Just Energy Transition Investment Plan
JETP	Just Energy Transition Partnership
JET PMU	Just Energy Transition Project Management Unit
JSE	Johannesburg Stock Exchange
JTF	Just Transition Framework
MEC	Minerals-Energy Complex
NBI	National Business Initiative
NECOM	National Energy Crisis Committee
NEDLAC	National Economic, Development and Labour Council
NPC	National Planning Commission
NTCSA	National Transmission Company of South Africa
NUM	National Union of Mineworkers
NUMSA	National Union of Metalworkers of South Africa
PCC	Presidential Climate Commission
PCCCC	Presidential Climate Change Coordinating Commission
PCFTT	Presidential Climate Finance Task Team
PST	Political Settlements Theory
RSA	Republic of South Africa
SACP	South African Communist Party
SAFTU	South African Federation of Trade Unions
SOE	State Owned Enterprise
UNFCCC	United Nations Framework Convention on Climate Change

Abstract

South Africa's climate transition is a paradoxical story: a period of increasingly progressive climate policy and inclusive institution-building between 2010 and 2022 — anchored in the PCC, the *Just Transition Framework* and the JETP — followed by political pushback, retrenchment and the emergence of a lower-ambition equilibrium. This paper asks why an apparent consensus on a just transition has not (at least yet) consolidated into a permanent settlement, and what this reveals about the relationship between institutions, power and equity (both procedural and distributional).

Drawing on *Political Settlements Theory* (PST), the analysis argues that for climate and just-transition reforms to endure, the distribution of costs and benefits must broadly align with prevailing configurations of power. South Africa's early momentum was driven by underlying shifts in incentives – climate risks, falling clean energy costs, carbon pricing and concessional finance – affecting the holding power of social partners. But the deeper structure of the post-apartheid settlement, rooted in the minerals-energy complex and rent-distribution networks, remained largely intact, allowing incumbents to reassert themselves as the distributional implications of decarbonisation became clearer. Elite fragmentation, state incoherence and lack of trust resulted in just transition provisions being implemented slowly if all at all, while consensus on a just transition gave way to a more cautious, investment-centred trajectory.

The paper traces this arc across four phases: the emergence of a socially negotiated climate consensus (2010 — 2018); a period of ambitious climate policy and institution building (2018 — 2022); the contestation and fragmentation that followed (2022 — 2025); and the consolidation of a lower-ambition equilibrium that reflects more closely the underlying balance of power (2025-). NB: some of these phases overlap, but they are a useful schema for explaining macro-trends.

The analysis demonstrates that inclusive policy design and participatory processes alone are insufficient to drive change: implementation depends on the organisational strength of actors able to both support and contest the trajectory of change, and on state coherence and capability to implement it. Technological change, market forces, organisational power and institutional innovation can disrupt incumbent interests and engender new economic sectors and constituencies, highlighting that political settlements are definitely not static.

Institutions like the PCC can expand the social foundation of the settlement by enabling emerging actors – clean tech enterprises, unions in new economic sectors, municipalities, community initiatives — to organise, voice demands and gradually increase their holding power. The Just Transition Framework (2022) sketched the architecture of a more equitable settlement; the challenge is to translate this vision into practice backed by the intent and capability to do so.

The central question this leaves the reader with is, therefore, not whether a just transition is technically feasible, but what political economy conditions are required to realise it i.e. how changing economic incentives and political

institutions can be harnessed to build constituencies capable of shifting the political settlement toward one that is genuinely inclusive, developmental and aligned with a low-carbon climate-resilient future.

Political Settlements Theory and its Relevance to the Climate Transition

This paper examines South Africa's apparent consensus on a just climate transition and seeks to understand why it has not been incorporated as an enduring component of the national political settlement. To do so, it draws on *Political Settlements Theory* (PST), which extends classical political-economy analysis by explaining how institutional arrangements allocate costs, benefits, and voice in line with the underlying distribution of power.

Following the work of Mushtaq Khan and subsequent PST authors[1], a political settlement can be understood as an explicit or implicit agreement among society's most powerful groups on a configuration of political and economic institutions expected to generate an acceptable distribution of benefits (Khan, 2010; Kelsall et al., 2022). Such arrangements give actors with *disruptive power* a stake in the system and reduce the likelihood of political or economic disorder. *Institutions* – the rules of the game – endure when the distribution of benefits (i.e. rents) they create is broadly consistent with the prevailing balance of power; when the alignment breaks down, actors who perceive themselves as losers have the incentive to pursue alternative informal channels of distribution, and the capability to disrupt the settlement until a new equilibrium emerges.

Applied to climate transitions, PST suggests that the durability of any climate compact depends on whether the economic and social costs of decarbonisation and adaptation are distributed in ways that align with existing power relations. Transitions that undermine the rents or authority of powerful incumbents without offering commensurate new opportunities will generate potentially insurmountable resistance. Conversely, transitions that fail to deliver meaningful voice or visible benefits to marginalised constituencies lack legitimacy and social support. In both cases, the likely result is instability, policy drift, or partial implementation.

Although PST was originally developed to explain why some developing countries sustain growth-enhancing institutions while others do not, it has proven useful for analysing climate transitions, which at their core are contests over how the costs and benefits of the climate transition are allocated. Two dimensions of the political settlement are especially relevant:

- **Social foundation** (broad vs. narrow): the extent to which major organised and peripheral groups are incorporated into the settlement and its distributive mechanisms;
- **Power configuration** (concentrated vs. dispersed): the degree to which elite interests are aligned around a long-term developmental agenda and a coherent, effective state (Kelsall et al., 2022).

[1] Notable is the Khan's work at SOAS, University of London, and the work of the Effective States and Inclusive Development (ESID) programme at the University of Manchester, but PST has been taken up widely by other academics e.g. at LSE, Oxford, Roskilde and Cape Town Universities, also in grey literature from international organisations such as World Bank, UNU WIDER, OECD, and ODI. PST formed the focus of the World Bank's 2011 World Development Report.

These two variables generate four archetypal forms of political settlement[2]: **broad–concentrated** — cohesive but inclusive states able to implement change while distributing benefits widely; **broad–dispersed** — pluralistic but fragmented states, producing ambitious plans that tend not to be implemented; **narrow–concentrated** — technocratically efficient states that risk exclusion; **narrow–dispersed** — weak or even fragile states which deliver only to small insider elites. As we will discuss in the next section, South Africa's political settlement has migrated through all four archetypes over the last century.

While *resource rents* have long been of interest to PST, it has only recently been applied to understanding *climate transitions*. Kelsall, Colenbrander and Simpson, for example, analyse Just Energy Transition Partnerships (JETPs) as reform projects whose credibility depends on the underlying settlement, and note that just transitions have the greatest chance of success in broad-concentrated settlements (Kelsall, Colenbrander and Simpson, 2024)[3]. Van Doesburgh and Winkler apply PST to explain how the post-apartheid settlement preserved the rent structures of the minerals–energy complex, shaping climate and industrial policy in ways compatible with an elite bargain. They also show how coalitions around low-carbon energy can gradually alter the balance of power, albeit incrementally (Van Doesburgh and Winkler, 2025).

Van Doesburgh and Winkler's analysis highlights an important point: while PST runs the danger of viewing power configurations as 'given' i.e. static, more recent applications emphasise how the *holding power* of groups evolves as new ideas, markets and coalitions emerge (Behuria, Buur and Gray, 2017; Kelsall et al., 2022). Settlements can change when institutions create opportunities for new actors to organise, marshal resources, and enter decision-making arenas. Inclusive governance mechanisms — if effectively designed and sequenced with policy reforms — can serve as stepping stones for coalition formation, enabling emerging sectors and communities to develop the organisational capability needed to press for more far-reaching reforms.

The degree of inclusivity in any institutional arrangement, therefore, depends as much on the *de facto* organisational capability of groups — their ability to impose costs on others and demand change — as on legal institutions and mandates. Access to resources is a key determinant of holding power — dominant economic actors may resist more open, rule-bound institutions because rents underpin their political leverage, while poorer or marginalised groups may lack the resources or organisational cohesion to take advantage of political openings. But wealth is not the only factor. Holding power is also rooted in the histories of stakeholder organisations and their learned capacities to organise and mobilise (Behuria, Buur and Gray, 2017). Thus, inclusivity reflects not only institutional design but also the broader organisational ecology of the settlement.

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[2] Other typologies have been used in PST, for instance Levy describes 6 settlement types based on three variables — whether the political arrangements are dominant or competitive; whether institutions are personalised or impersonal; and the extent of economic inclusion (Levy, 2014).

[3] According to the authors, the ideal configuration for a *just transition* is broad–concentrated, but JETPs in South Africa and Indonesia occur in broad–dispersed settlements, while Vietnam is narrow–concentrated. Narrow–dispersed settlements will struggle to implement just transitions at all.

This paper aligns with Van Doesburgh & Winkler's analysis of the constraints South Africa's political settlement places on energy and climate policy, as well as their emphasis on the potential for policy sequencing to build green industrial sectors and coalitions for change. However, the focus of this analysis is on the *institutions for climate governance*, informed by my own experience leading the Presidential Climate Commission[4]. The story of the PCC and related institutions demonstrates how shifts in organisational power (both vested interests and marginal groups) drive the ebb and flow of climate policy and its implementation. It reveals a greater level of dynamism in the climate policy space, marked by cycles of advancement, retreat and consolidation. Finally, the paper emphasizes the validity of the *Just Transition Framework*, arguing that a sustainable climate compact will depend on whether the political settlement can shift to incorporate the institutions and distributional commitments implied by the policy.

In this paper I have restricted the term political settlement to describe the overall national configuration of power, institutions and rents, i.e. the national settlement. Sectoral energy and climate issues may form part of a national settlement, but I have avoided characterising them as settlements in their own right. Instead, to the extent that there are specific alignments relating to climate policy, I use the terms agreement, consensus or compact, depending on context.

The Political Economy of the South African Transition

South Africa's climate transition cannot be understood apart from the structural legacies of its colonial and apartheid political settlement. At the height of apartheid (1948 to the late 1970s) Afrikaner political power, capital accumulation and state formation combined in a narrow, concentrated settlement (Levy, 2014; Kelsall et al., 2022). The apartheid state fused racial segregation and domination with a distinctive model of industrialisation in which political authority, bureaucratic capability and corporate capital were tightly aligned around the extraction and processing of mineral and energy resources (Fine and Rustomjee, 1996; Ashman, Fine and Newman, 2013). The minerals–energy complex (MEC)[5] rested on abundant and coerced black labour, cheap and accessible coal, and dense state–corporate alliances that concentrated ownership and decision-making within a small white elite.

Throughout the twentieth century, industrial policy entrenched the MEC as the backbone of the economy: state-owned corporations such as Eskom, Sasol and Iscor were purpose-built to supply subsidised energy, feedstocks and infrastructure to mining and heavy industry (Marquard, 2006). The economic order it produced was simultaneously high-emissions, capital-intensive and exclusionary, locking the black majority out of productive assets, skilled work

[4] I was the inaugural Executive Director of the PCC from 2021 to 2024, and subsequently the Deputy Chair (2025).

[5] While widely referenced in political economy literature on SA's energy transition, the MEC concept is not without its critiques. Recently Niall Reddy has argued that the concept rests on weak empirical foundations; that its size and coherence in national accounts is a statistical artefact produced by an over—broad grouping of primary and heavy industries; that post—1994 liberalisation means that the conditions required for an MEC system of accumulation no longer exist, if they ever did. He also questions whether firms in mining, energy and heavy industry act cohesively to drive state policy (Reddy, 2025).

and institutional voice (Winkler and Black, 2021). By the late 1980s, five conglomerates — Anglo American, Sanlam, Old Mutual, Liberty and Rembrandt — controlled around 85% of the Johannesburg Stock Exchange, making South Africa one of the most concentrated economies in the world (Hirsch, 2005).

From the late-1970s onward, this narrow settlement became increasingly dispersed. The apartheid siege economy entered crisis as the narrow distribution of rights and income stifled consumption and economic diversification; the MEC shed labour in a bid to preserve its capital-intensive accumulation model; and political resistance escalated. The Soweto uprising (1976), industrial militancy, township mobilisation and international sanctions triggered fractures within the National Party over how to defend the order. Tentative reforms failed to keep the ruling elite cohesive, and fiscal stability and coercive authority eroded. The MEC's political guardians presided over an increasingly ungovernable system — still narrow, but far less capable of enforcing its institutional bargains (Levy, Hirsch and Woolard, 2015; Kelsall et al., 2022).

The 1994 transition produced a broad political settlement that formally incorporated the majority of citizens and key organised actors – the ANC and its Tripartite Alliance allies (COSATU and the SACP), community and civil society organisations in the mass democratic movement, but also large corporates and former homeland bureaucracies that had accommodated themselves to the new regime. A relatively impersonal institutional architecture protected property rights and the rule of law, backed by an entrenched and extensive bureaucracy, which preserved core economic structures such as the MEC-intensive production system. Redistribution focused on the extension of free basic services, social protection, affirmative action and preferential procurement (BEE), but the deeper patterns of ownership, concentration and capital intensity shifted slowly if at all (Levy, Hirsch and Woolard, 2015; Kelsall et al., 2022).

This broad–concentrated configuration stabilised the first post-apartheid period. It anchored policy continuity, enabled a professional civil service and sustained industrial incumbents while extending welfare gains to millions. Big business remained influential in economic decision-making; COSATU's influential role in the Tripartite Alliance significantly expanded worker protections; but marginal constituencies lacked the organisational capacity to drive deeper structural reforms. While the settlement was broad in architecture, persistent inequality and a narrower distributional base limited the depth of the social foundation and threatened its stability (Levy, 2014).

Widespread liberalisation — tariff reduction, fiscal restraint, corporatisation and limited privatisation – did not fundamentally alter MEC structures. Eskom, Sasol, mining houses and energy-intensive firms continued to benefit from preferential coal contracts, long-term supply arrangements, subsidised electricity and state-supported infrastructure (Burton, Caetano and McCall, 2018). Industrial policy was contradictory, focused heavily on competition regulation rather than structural transformation, reinforcing capital-intensive models (Black, Anthony and Roberts, 2009). Path dependence deepened: coal-based generation formed the technological and economic core of the system, while institutional guardianship of coal interests within Eskom and the Department of Mineral Resources and Energy (DMRE) constrained diversification and slowed renewable-energy uptake despite improving cost curves (Chilenga-Butao and Holland, 2024).

The start of Jacob Zuma's presidency coincided with the 2007/08 global financial crisis, triggering a prolonged period of economic stagnation. The settlement remained broad — encompassing major social forces such as the tripartite alliance, newly empowered black elites and rural voter bases — but informal distribution channels proliferated with clientelist penetration at provincial and local levels of the ANC (Butler, 2010; Butler et al., 2015). Factional competition resulted in splinter parties from the ANC such as the Economic Freedom Fighters. Divisions also fractured labour: the powerful and left-wing National Union of Metalworkers of South Africa (NUMSA) was ejected from COSATU in 2014, leaving COSATU dominated by public-sector unions. With the elite tied up in internecine battles, the political settlement became increasingly dispersed, state capability continued to erode, and distributive pressures intensified (Kelsall et al., 2022).

State capture accelerated this dispersion. Eskom and other SOEs became focal points for rent extraction — through inflated coal contracts, corrupt procurement and criminalised logistics networks — precipitating the load-shedding crisis[6] and weakening the institutional core of the political order (Chipkin, 2016; Bhorat et al., 2017; Chipkin and Swilling, 2020; Zondo, 2022). Black Economic Empowerment brought new entrants into existing value chains, but without shifting the underlying capital-intensive accumulation model. Instead, it produced a hybrid order in which longstanding corporate groups retained industrial dominance while politically connected actors captured procurement, mining and logistics rents.

Inequality magnified these pressures. A small upper tier captured most gains; the middle 40% experienced rising job insecurity; and the vulnerability AND structural exclusion of the bottom 40% deepened. Under these conditions, coalition maintenance — rather than developmental transformation — became the overriding imperative. As state capability weakened, informal and personalised channels of accumulation proliferated, while the distributional demands of constituencies strained the fiscal and institutional base of the settlement (Levy, Hirsch and Woolard, 2015).

The energy system has amplified this structural inequality. The coal economy supports roughly 100,000 direct jobs and 200,000 jobs in all — but they are precarious, male-dominated and spatially concentrated (Makgetla and Patel, 2021; Bhorat et al., 2023). Communities in Mpumalanga bear the brunt of environmental harm, while millions experience energy poverty and unreliable supply (Hallowes and Munnik, 2019; Carter et al., 2024). These vulnerabilities create ambivalence if not resistance to structural change, particularly when the state struggles to provide credible alternatives.

The election of Cyril Ramaphosa in 2019 raised expectations of a reversal of state capture and renewed growth, but deep internal tensions within the ANC and the tripartite alliance persisted, culminating in the 2023 breakaway of Jacob Zuma to form the Umkhonto we Sizwe Party. Structural economic reforms were initiated under Operation Vulindlela, but implementation by line departments has been uneven in a divided state marked by political

[6] Loadshedding (planned rolling blackouts) started in 2019 but became particularly acute in the period 2022 – 2024, leading to massive economic disruption and social impacts.

deployments and divergent interests. The 2024 election saw ANC support fall below 50% for the first time, leading to a politically discordant Government of National Unity (GNU) which includes the liberal market-oriented Democratic Alliance. This has broadened political incorporation — GNU parties hold over 70% of parliamentary seats – and diluted the influence of players such as COSATU and the SACP. Ideological divergence (laid on top of weakened institutions) has produced a highly dispersed centre with a minimalist common programme, while rent allocation is contested across multiple loci of power rather than coordinated through a capable developmental state.

It is within this broad but highly dispersed national settlement that South Africa has attempted to craft new forms of climate governance. The emergence of a consensus around the climate-transition — however tentative — sits uneasily alongside entrenched MEC interests, distributive tensions and institutional fragility. Whether this consensus represents a meaningful deepening of inclusiveness or a fragile accommodation under conditions of constraint is the puzzle that the next section examines.

The Emergence of a Social Compact around the Climate Transition (2010 – 2018)

By the late 2000s, South Africa's political economy confronted converging pressures: a fragile, carbon-intensive growth model, deepening inequality, and an external environment increasingly shaped by ESG standards, carbon pricing and competition for green investment. In this context, climate policy began to shift from a narrow environmental issue to a developmental and economic one. Falling global prices for renewable energy and battery storage[7], growing recognition of carbon-risk exposure, and tightening international climate norms started to alter the incentives and holding power of key actors. These pressures opened limited space for a more inclusive and climate-aligned political settlement, setting the stage for the emergence of consensus around a *just transition* between 2010 and 2022.

The National Climate Change Response White Paper (DEA, 2011) marked a conceptual shift in climate governance. While earlier policy largely emphasised mitigation compliance and reporting, the 2011 White Paper framed climate action as a lever for sustainable development, poverty reduction and employment creation. It recognised, albeit briefly, the need for a *just transition* and acknowledged that decarbonisation would have uneven socio-economic impacts requiring proactive management. This reframing signalled a broadening of the scope of the climate agenda and greater alignment of climate and developmental priorities within the state.

For government, this period was defined by a dual movement: growing interest in green industrialisation and mounting constraints within the carbon-dependent economy. New industrial strategies — the New Growth Path

[7] Since 2010 the levelized costs of electricity (LCOE) for renewable energy technologies have fallen dramatically – 90% for solar PV, 77% for CSP, 70% for onshore wind, and 62% for offshore wind (IRENA, 2025). Lithium—ion battery pack prices have declined by roughly 95% since 2010, from about US$1,200/kWh to around US$115/kWh in 2024 (Bloomberg NEF, 2025).

(EDD, 2010), Industrial Policy Action Plans (2011–16), and the Green Economy Accord (2011) — positioned renewables, energy efficiency and green manufacturing as engines of inclusive growth (Van Doesburgh and Winkler, 2025). At the same time, the rapid drop in clean-energy costs challenged the MEC's economic logic, while the introduction of a domestic carbon tax from 2012 signalled that high-emitting sectors would factor in costs of their externalities. These technological and policy shifts subtly altered holding power within the settlement, strengthening the hand of actors advocating for diversification. Yet Eskom's escalating debt, cost overruns at Medupi and Kusile, and systemic governance failures left the state dependent on the rents of an increasingly unsustainable coal economy (de Ruyter, 2023; Geddes and Schmidt, 2024). The result was an ambivalent state position: rhetorically committed to a green transition but structurally tied to incumbent interests.

Labour's historical influence in the political settlements has been built on the concentration of employment in mining, heavy industry and state-owned enterprises that are at the heart of the MEC. Unions in these sectors have been deeply embedded in the coal industry, giving them bargaining power and the ability to push for labour protections and better wages. However, since the early 2000s, de-industrialisation, automation and corruption in SOEs have weakened labour's structural power. Membership has stagnated or declined in MEC sectors, the number of unions has proliferated, and COSATU's influence through the tripartite alliance has weakened[8]. At the same time, unions in the late 2000s began confronting the material implications of climate change and carbon exposure for workers: rising energy costs, natural resource and water shortages and growing risks for employment in energy-intensive and trade-exposed sectors.

COSATU's Policy Framework on Climate Change (2011) articulated a worker-centred just transition, calling for decarbonisation to be accompanied by employment guarantees, social protection and democratic participation in industrial policy (COSATU, 2011). These themes laid the basis for the emergence, a decade later, of COSATU's Just Transition Blueprint for Workers (COSATU, 2022). As a core component of the ANC alliance, labour's shift carried significant political weight. It injected equity and transition-oriented discourse into economic debates within the alliance, insisting that workers and vulnerable communities be recognised as legitimate stakeholders.

From 2012 onwards, the just transition was frequently referenced in ANC policy documents. For instance, in the build-up to the 2012 ANC Policy Conference, the economic policy discussion document stated that "It is important that we contribute towards the global shift to a low carbon development path. In the course of this transition, we must be guided by the overarching principle of sustainability and a "Just Transition". (ANC, 2012). The concept of a just transition continued to evolve, and by the time of the ANC's 2022 Policy Conference, explicit reference was made to a broader social compact in which social partners would lead (in the case of government) or support (labour, civil society and business) a "just transition to a low carbon economy and climate resilient society" (ANC, 2022).

Within business, the 2010s brought growing recognition that carbon-intensive production posed competitive and financial risks. Three dynamics were pivotal. First, the prospect of carbon border adjustment mechanisms (CBAMs)

[8] Personal communication with former labour leader November 2025.

threatened market access for high-emissions exports, particularly in steel, cement and aluminium (Ward, 2023). Second, the rise of ESG standards, investor activism and green finance raised compliance expectations for listed companies. Third, resource constraints — water scarcity, grid instability and rising electricity prices — exposed vulnerabilities in the emissions-heavy industrial model. These shifts, combined with rapidly falling renewable-energy costs, encouraged segments of organised business to view climate action as an opportunity for competitiveness rather than a regulatory threat. Organisations such as the National Business Initiative (NBI) began promoting low-carbon pathways, mainstreaming climate-risk disclosure and modelling transition scenarios (National Business Initiative, 2023). Though uneven, this repositioning signalled a reconfiguration of business interests and a modest shift in holding power toward actors favouring diversification and technological change.

Civil society activism provided the normative impetus for a justice-oriented transition. Environmental justice organisations — including Earthlife Africa, the World Wildlife Fund and groundWork — had long highlighted pollution and environmental racism. By the 2010s, their work increasingly linked ecological issues to inequality, health and democratic accountability (Jacklyn Cock, 2016; Satgar, Vishwas, 2018; Hallowes and Munnik, 2019). Youth-led and faith-based movements, as well as campaigns such as 350Africa.org and the Climate Action Network, expanded the social base of climate activism and popularised the language of climate justice. These groups pressed for community-centred, redistributive approaches to the transition and demanded participatory governance. In doing so, they pushed the state to widen consultative forums and helped institutionalise the idea that marginalised communities must have a voice in transition planning, thereby expanding the social foundation of the settlement.

These sectoral shifts gradually converged into a shared vocabulary — if not yet a common strategy. Government emphasised green growth; business focused on competitiveness and risk; labour championed a worker-centred just transition; and civil society framed climate action as a struggle for environmental and social justice. What emerged was an embryonic social compact: broad recognition that decarbonisation was inevitable, that it would have significant distributive implications, and that social dialogue and inclusive policies would be essential to manage them.

The Presidential Jobs Summit Framework Agreement (NEDLAC, 2018) crystallised this convergence. Although centred on the employment crisis, the agreement explicitly acknowledged that climate change and the energy transition would significantly shape South Africa's labour market. It committed social partners to proactive planning through National Employment Vulnerability Assessments (NEVAs) and Sector Jobs Resilience Plans (SJRPs), and most importantly, proposed the establishment of a Presidential Climate Change Coordinating Commission (PCCCC) to coordinate measures around the just transition. The 2018 agreement anchored the logic of social compacting that resulted in the formation of the Presidential Climate Commission (PCC) in 2020.

While government was going through the motions of setting up the PCC, the National Planning Commission's Just Transition Dialogues (2018 — 2019) further strengthened this trajectory. Through wide-ranging consultations with government, labour, business, civil society and communities, the NPC articulated a 2050 vision of a "socially inclusive, equitable, climate-resilient economy and society" (National Planning Commission, 2019). Highly

consultative (but with patchy business participation), the process built consensus around just transition principles and applied these to ecosystem-based 'pathways' for energy, water and food security. The NPC process also strengthened the organisational capability of new constituencies and broadened the emerging climate coalition.

Together, these developments represented a subtle but important expansion of South Africa's political settlement as it related to climate action. Technological shifts reduced the economic dominance of incumbents, while participatory institutions began to widen the social foundation of the settlement — though not yet its underlying distribution of rents. Whether these changes were sufficient to overcome entrenched interests and reshape the path-dependent political economy of the MEC remained an open question, one that the subsequent emergence of the Presidential Climate Commission would put to the test.

Peak Climate Ambition and Consensus (2018 – 2022)

Between the Presidential Jobs Summit (2018) and JET Investment Plan (2022), South Africa reached a high-water mark of the climate transition. During this period, the Presidential Climate Commission (PCC) was established, the Just Transition Framework adopted, and the Just Energy Transition Partnership (JETP) and Investment Plan (JET-IP) launched. Together, these developments created a moment of alignment in which government, business, labour and civil society converged — however imperfectly — around a shared narrative: that South Africa could decarbonise, attract green investment and deliver social justice simultaneously.

The 2018 Jobs Summit Framework Agreement had called for a high-level coordinating body to manage the employment impacts of decarbonisation and ensure policy coherence. In December 2020, President Cyril Ramaphosa appointed the Presidential Climate Commission (PCC), located in the Presidency and chaired by the President — signalling the attention to climate policy at the centre of executive authority (The Presidency, 2020)

The composition of the PCC was an institutional innovation. Ministers, SOEs, organised business and labour, civil society, youth, academia and local government were represented. This wide spectrum of actors broadened the social foundation of the settlement: it brought into the decision-making arena groups with the potential to disrupt or legitimise the transition, albeit with very different types of organisational capacities. The PCC's mandate — advisory but expansive — covered mitigation, adaptation, finance, and the social dimensions of the just transition (The Presidency, 2020)

During 2021-2022, the PCC established an operational charter, a professional secretariat and thematic workstreams. From inception, it adopted a transparent mode of governance –commission meetings were public, with active outreach and highly consultative processes in preparing PCC recommendations. This transparency distinguished it from earlier performative and technocratic processes and became the PCC's defining procedural norm (ICLEI Africa, 2024; PCC, 2024e). In PST terms, the PCC was a participatory institution that enhanced the organisational voice of previously marginalised actors, shifting the balance of holding power.

The PCC's first major test came in 2021 when it was asked to advise on South Africa's updated Nationally Determined Contribution (NDC). Because the NDC set the trajectory for 2030 emissions, it carried significant distributional implications. Building on detailed modelling by the Energy Systems Research Group at UCT, as well as CSIR and the National Business Initiative (NBI), the PCC recommended a substantially more ambitious target range[9] (PCC, 2021; National Business Initiative, 2023). Crucially, the modelling demonstrated that a net-zero-by-2050 pathway was not just technically and economically feasible, but would also lead to greater economic competitiveness, investment and job creation. The increased ambition was to be accompanied by measures to ensure a just transition and ameliorate any negative effects on labour and communities. This helped shift business and labour incentives and lowered resistance to a higher level of ambition.

Cabinet's approval of the PCC's recommendation and the subsequent submission to the UNFCCC ahead of COP26, was therefore a milestone. It represented the first jointly negotiated climate target endorsed by all major social partners and underpinned by credible analysis — an alignment of institutional mechanisms, scientific evidence and political will. The upper and lower boundaries in the emissions trajectory, linked to what could be done with own resources and additional external resources respectively, also set up the negotiations with international partners that led to the Just Energy Transition Partnership (JETP).

The PCC's flagship achievement was the development of the Just Transition Framework (JTF) in 2021 — 2022. Drawing on a decade of conceptual and policy work — from COSATU's early just transition advocacy to the NPC dialogues — the Framework articulated a national vision for a fair and inclusive transition. Developed through public dialogues (informed by accessible policy briefs (Montmasson-Clair, 2021)), community townhalls and national stakeholder consultations, the JTF defined the transition as "a systemic, managed process that seeks to achieve net-zero greenhouse gas emissions by 2050 while improving livelihoods, creating decent work, and promoting social inclusion and resilience" (PCC, 2022, 2024e)

It outlined three dimensions of justice — distributive, procedural and restorative — and proposed a combination of industrial policy, regional diversification, reskilling, social protection and participatory governance interventions (Montmasson-Clair, 2024). Cabinet's endorsement of the JTF in August 2022 marked a high point of climate consensus: social partners had co-produced a framework that balanced justice, growth and investment, and it was widely recognised as a model of inclusive policy making.

After the JTF's adoption, the PCC turned to how it would be implemented, particularly in Mpumalanga, where power-station decommissioning posed acute risks. Research and public consultations identified opportunities in sustainable forestry, agriculture, biofuels and eco-tourism (PCC, 2024c). Parallel work on skills, social protection and local economic diversification explored the possibility of new partnership models, regional coordination

[9] The PCC recommended an emissions range of 350—420 Mt CO_2e for 2030 compared to the DFFE's draft target of 398–440 Mt CO_2e. The top end of the range (what could be achieved with own resources) was modestly lower, and the bottom end (contingent on external resources) significantly lower.

mechanisms and municipal capabilities. The PCC advanced work on social ownership models for renewable energy — cooperatives, community trusts and municipal participation — expanding the distributive logic of the transition (PCC, 2024d). These initiatives sought to create a stake in reform for new constituencies.

At COP26 in Glasgow, South Africa announced the Just Energy Transition Partnership (JETP) with France, Germany, the United Kingdom, the United States and the European Union. The $8.5 billion pledge was intended to support a five-year investment plan for power-sector decarbonisation, green hydrogen and electric vehicles, as well as some just-transition measures (The Presidency, 2022, 2023). The subsequent JET-IP estimated total investment needs at $98 billion, mainly focused on grid infrastructure and new generation capacity, but also with allocations for municipal energy systems, New Energy Vehicles, green hydrogen, skills development, and regional economic diversification. Nevertheless civil society and some unions criticised the low percentage of allocations to just-transition interventions (IEJ & CLIFT, 2023; PCC, 2023a).

Despite these tensions, the JETP signalled significant international confidence in South Africa's climate transition as well as the credibility of its governance architecture and demonstrated the country's ability to unlock additional resources. Domestically, it reinforced the belief that climate ambition could be aligned with economic transformation and investment, and triggered a period of detailed planning, pipeline development and institution building within government[10].

The Climate Change Act (Act No. 22 of 2024) had been under negotiation inside and outside government since its first publication in 2018, and while its eventual promulgation in 2024 fell outside the period described above, it was very much a product of the time. The discretionary regulatory powers it conferred on the Minister, for instance to set emissions targets for sectors and industries, had been controversial (NEDLAC, 2021). Also, due to the inherently cross-cutting nature of climate matters, the Act traversed different political principals, and Ministers resisted conferring powers on another Minister to oversee their work[11]. Nevertheless it ultimately managed to pass through NEDLAC, Cabinet and Parliament with its basic legislative provisions intact. The Act enshrined principles of inclusion, equity and justice; established national mitigation and adaptation planning systems; created statutory mechanisms for an emissions trajectory, carbon budgets and sectoral targets; and mandated local climate forums (RSA, 2024). Though it did not grant the PCC the coordinating mandate envisaged by the Jobs Summit, it codified some of the Commission's procedural innovations — transparency, multi-level governance and participatory decision-making — as well as a multi-level climate governance architecture. The level of ambition was ultimately left to Ministerial discretion[12], with the effectiveness of regulatory measures depending on political will and the fiscal resources and capacity to implement them.

[10] Personal communication, JET PMU in Presidency, November 2025.
[11] Personal communication, former NEDLAC official, November 2025.
[12] E.g. the Minister's power to determine the emissions trajectory and set sectoral emissions targets through regulations.

The period from 2018 to 2022 thus marked a high point for South Africa's climate transition. The PCC institutionalised inclusive dialogue; the NDC update was based on achievable, evidence-based target-setting; the Just Transition Framework codified justice as a core principle; the JETP mobilised unprecedented levels of international finance; and the Climate Change Act (albeit passed a bit later) translated these gains into law. The interests of state, labour, business and civil society seemed aligned around a developmental vision of a fair, managed transition.

Did this moment reflect an enduring component of the national settlement, in which shifting technologies, incentives and institutions broadened the social foundation and rebalanced holding power, or was it a more transient alignment, based on negotiated deals without a social base? Whether this consensus could withstand political contestation, economic shocks (such as the power crisis) and competing rent-seeking pressures was far from certain. The next section examines how and why this moment began to unravel.

Contestation and Fragmentation (2022 – 2025)

The period following the adoption of the Just Transition Framework and the launch of the JETP exposed the fragility of South Africa's climate consensus. What had appeared between 2018 and 2022 as a coherent, socially negotiated project began to fragment under the combined pressures of macro-economic deterioration, shifting global currents, state incoherence, weak implementation and political resistance. By 2025, the compact that had briefly united government, labour, business and civil society had devolved into competing narratives and divergent interests.

The closure of Komati Power Station in 2022 became the symbolic turning point. Presented as a model for "repurposing, repowering and reskilling," Komati was meant to demonstrate that decarbonisation could be socially managed[13]. Instead, it revealed the absence of a coherent transition plan and a divided government that was unable to respond effectively. The DMRE was the department responsible for overseeing the energy transition, including managing the mine closure process, but it played no role in overseeing power station decommissioning. This was largely left up to Eskom (at the time regulated by the Department of Public Enterprises), but Eskom saw its responsibilities as limited to inside the perimeter of the power station. Eskom took care of their workers by deploying them elsewhere, but there were wider regional impacts as coal mines closed, contractors lost their jobs, and the regional economy deflated. Eskom disposed of its assets outside the power station, including community halls and sports facilities. The district and local authorities did not take over responsibility for municipal services in the town, and the settlement around Komati rapidly deteriorated. A PCC review found that the scope of the decommissioning project was too narrowly conceived, workers and surrounding communities received limited

[13] The Eskom decision to close the Komati power station in 2017 was not due to decarbonisation objectives, but rather because the power station had reached the end of its economic life. Nevertheless, as the first decommissioning of a power station in the current era, it was viewed as indicative of how future decommissioning processes could be managed.

consultation, planned diversification projects lagged behind the shutdown timeline, and funding for social measures was grossly inadequate and poorly coordinated (PCC, 2023b).

For organised labour, Komati signalled that just-transition commitments were more rhetorical than real. NUMSA had long expressed opposition to any power station closure and decried the lack of consultation (IndustriALL, 2017). The National Union of Mineworkers expressed extreme unhappiness with the process, saying that it had led to widespread poverty and was being driven by foreign agendas (NUM, 2023). The episode undermined trust in the state's capacity and willingness to uphold the principles of the *Just Transition Framework* and marked the first major rupture in the climate compact.

Beyond Komati, limited follow-through on just-transition commitments deepened scepticism. Despite Cabinet having adopted the Just Transition Framework, a 2024 PCC–DPME review of national and provincial Strategic Plans found that few departments had integrated measurable just-transition targets, programmes or associated budget lines (Carter et al., 2024; PCC, 2025a). Social protection, reskilling for coal workers and local economic development in declining regions — central elements of the JTF — were largely absent from core government programming.

This inertia revealed a deeper structural contradiction: while the state endorsed a justice-oriented transition in principle, there were powerful interests in the high-emissions energy economy – state and non-state — that did not want a managed transition out of coal to succeed. More broadly, elite contestation, a narrowing social base and weak state combined to favour short-term stability in the energy sector over longer-term redistributive transformation. In PST terms, ambitions outpaced the distribution of holding power, which remained aligned with incumbent interests in the minerals-energy complex.

The publication of the Just Energy Transition Investment Plan (JET-IP) in late 2022 intensified these tensions. Fierce opposition came from labour and environmental justice groups — including groundWork, Earthlife Africa and the Climate Justice Coalition – who condemned the lack of engagement, opaque drafting process and lack of accountability mechanisms. The limited funding allocation to skills and economic diversification together with the emphasis on energy system deregulation and competition were interpreted by labour and civil-society organisations as a market-centric restructuring of the energy system rather than a just transition. COSATU criticised the plan as 'creeping privatisation' through unbundling and private-sector-led generation, and rejected the 'neoliberal policies' intended to weaken Eskom and undermine energy security (COSATU, 2023; IEJ & CLIFT, 2023; PCC, 2023a).

The PCC's independent critique acknowledged these weaknesses and recommended substantial reallocation toward just transition priorities (PCC, 2023a). The subsequent JET Implementation Plan sought to address many of these concerns, including increasing the allocation for skills development, economic diversification and local government. But the competitive private sector-led investment approach remained a core focus, while social security was not provided for in the plan, and the participatory approach that stakeholders called for did not materialise (The Presidency, 2023). For labour and civil society actors the controversy reinforced their scepticism: the lack of trust

meant that ideological contestation over ownership, control and the role of markets versus the state in the transition predominated over any sense of shared vision.

As domestic tensions grew, JET-IP implementation dragged. Despite global fanfare at COP26, the coordination mechanisms and actual investment plan took time to establish[14], while project pipelines were found to be rudimentary. Disbursement of concessional finance lagged due to protracted negotiations over a somewhat disparate set of bilateral offers, which were difficult to tie down and lacked flexibility[15]. International partners sought to extract maximum decarbonisation leverage, and grappled with complex approval processes, currency-risk concerns and evolving geopolitical priorities (The Presidency, 2023; Vanheukelom, 2023; Lehmann-Grube et al., 2024; Meattle et al., 2025).

Within government, an inter-Ministerial committee oversaw coordination of the JETP, but it was highly contested and broader energy reforms remained dispersed across the Presidential Climate Finance Task Team, DFFE, DMRE, the Department of Public Enterprises, National Treasury and Eskom, creating ambiguity over roles and accountability[16] (Krutham, 2025). This fragmentation frustrated social partners: labour and civil society saw limited progress on justice components; business lamented policy uncertainty; donors questioned state capacity to absorb funds.

Business confidence continued to deteriorate in the aftermath of the COVID pandemic, amid low growth, fiscal tightening and infrastructure collapse. Many firms shifted from climate ambition to risk containment, doubting whether updated NDC targets could be achieved. Eskom and SASOL, which had presented forward-looking net-zero strategies to the PCC in 2021, watered down key elements of their plans[17]. Rising interest rates, global supply-chain disruptions and energy-security fears intensified this defensive posture (SACCI, 2022; Tshifhumulo, Heyns and Kilbourn, 2025).

At the same time, business influence over the energy agenda increased. NECOM — established as a "government-and-business partnership" in 2022 to resolve load-shedding — became a *de facto* centre for energy planning, dominated by technocrats, engineers and corporate sponsors (Energy Council, 2023; Bowmans, 2025). Its problem-

[14] The Presidential Climate Finance Task Team located in the Presidency was established in February 2022, and it spent the year negotiating the JETP offer and putting together the JET Investment Plan. It was replaced by the JET PMU under the Projects Office in the Presidency in January 2023.

[15] Most JETP finance was channelled through established ODA mechanisms and did not provide the flexibility needed to backstop an integrated financing strategy. A large proportion of the funding was provided as policy loans to National Treasury, which did not correspond directly to JET—IP plans. Further, many donors sought to repackage existing financial commitments as JETP finance, and channel them through their own development agencies.

[16] Coordination was further complicated by the establishment of the National Energy Crisis Committee (NECOM) in early August 2022 following the announcement of the Energy Action Plan in July 2022, and the appointment of Kgosientsho Ramokgopa as the Minister in the Presidency responsible for Electricity in March 2023.

[17] Eskom has been actively reconsidering how fast coal can be shut down given South Africa's energy security concerns, and their current strategy does *not* call for premature closure of any station. Sasol has not renounced their net—zero goal but moves to rely more heavily on offsets, to delay or drop earlier renewables targets, and to raise doubts about feasibility suggests back—tracking.

solving orientation was widely lauded, but it did not include participation outside of business interests, reinforcing perceptions that the transition was shifting from a socially negotiated project toward a technocratic-corporate project[18].

By 2023, a concerted pushback against South Africa's climate agenda was under way. Fossil-fuel-aligned interests — including segments within DMRE and Eskom, the coal industry and factions within the ANC — mobilised against what they framed as externally imposed 'green imperialism' (Bookbinder, 2024; Chilenga-Butao and Holland, 2024). The 2023 draft IRP proposed new coal and constrained renewable-energy deployment, directly contradicting PCC recommendations (PCC, 2023c). Large corporates which had previously been favourably disposed to net-zero policies actively pushed back against the climate agenda (Mathe et al., 2023; Bookbinder, 2024; Just Share, 2025).

This counter-mobilisation leveraged real social anxieties about jobs, sovereignty and energy security (PCC, 2024b). Labour unions concerned about job losses found alignment with coal lobbies. Nationalist factions invoked developmental-state rhetoric to defend fossil interests. The PCC itself came under political attack, accused of promoting donor agendas and undermining state authority. In PST terms, incumbents were reasserting their holding power and reframing the transition as a threat to economic and political stability.

Domestic fragmentation coincided with an unfavourable global environment. Rising right-wing populism in Europe and the United States weakened international consensus on climate action (Colgan and Genovese, 2025; Tao and Ryan, 2025). Fossil-fuel-funded misinformation networks gained traction, and donor priorities shifted toward energy security after the Ukraine war. These currents reduced the political cover available to reformist actors in South Africa and amplified sceptical narratives about conditionality, sovereignty and climate finance. Climate policy thus became entangled in the broader governance crisis facing the state — characterised by fiscal strain, declining state capability and fragmented political authority.

Taken together, these dynamics led to a partial unravelling of South Africa's climate consensus. What remained was a lower-ambition equilibrium: a transition calibrated to political and capacity constraints and aligned with dominant economic interests. But as the climate compact unravelled, new uncertainties emerged. What remained of the climate agenda? How durable was this reduced-ambition order? And what alternative configurations of power and participation might yet reshape the trajectory of South Africa's climate transition?

[18] Just Share notes that the Energy Council of South Africa which interfaces closely with NECOM, is "governed predominantly by fossil—fuel industry actors" and thus may lead to bias in agenda—setting and policy influence (Just Share, 2025). SAFTU alleged that NECOM was being used to channel major business/consultancy firms into government planning (citing firms like Bain & Company and McKinsey & Company) and thereby replicating corporate influence into public—policy architecture (SAFTU, 2024).

A New Climate Equilibrium (2025 Onwards)

By early 2025, the early momentum behind South Africa's just transition had dissipated into a new, lower-ambition equilibrium — one that more accurately reflected the prevailing balance of power between state, business, labour and civil society. The language of the just transition and the formal architecture of inclusive climate governance remained intact, yet their substantive influence had narrowed. The new phase is characterised less by participatory co-creation and more by incrementalism, pragmatic compromise and some familiar ideological divides.

On the face of it, the climate-governance architecture is robust. The Climate Change Act (2024) is in force, establishing statutory mechanisms for mitigation and adaptation planning, sectoral emission targets and local climate forums. The PCC continues to advise government and convene dialogues on sectoral transformations, industrial policy, skills and climate finance. Yet beneath this continuity lies an institutional vacuum. The Act relies heavily on departmental self-compliance and the limited coordinating capacity of DFFE, with no central authority capable of enforcing alignment around the just transition (Krutham, 2024). The PCC, despite its legitimacy and technical expertise, retains only an advisory status and cannot compel government consideration of its recommendations, let alone oversee implementation. As mentioned, few departments have embedded measurable just-transition targets or associated budget allocations, and there is no authority that compels them to do so (PCC, 2025a).

The state maintains its formal commitment to net-zero by 2050, and the previously adopted 2030 NDC range (350-420 Mt CO_2e, which is aligned with Paris Agreement targets) remains in place. However, the newly submitted NDC (DFFE, 2025) sets a modest 2035 target (320-380 Mt CO_2e) that is well below what existing government policy will achieve, and it is not aligned with a net-zero by 2050 decarbonisation pathway (PCC, 2025b)[19]. In PCC deliberations on the NDC, organised business, government and labour supported the more limited targets proposed by DFFE, while civil society and scientific organisations pushed for greater levels of ambition (PCC, 2025b). Implementation of the Climate Change Act mirrors this cautious approach. Sectoral emission targets are being drafted but are tied to the NDC, hence remain insufficiently compatible with the Paris Agreement. They are also unsupported by enforcement mechanisms or adequate financing (Climate Action Tracker, 2025). The centre of gravity in climate policy has shifted toward procedural compliance — reporting, consultation and regulatory alignment — rather than transformative investment or redistributive social policies (Krutham, 2024; Lavrik, 2025).

These developments reflect an accommodation of climate policy with the holding power of incumbents: large corporations, black-owned enterprises, dominant ANC factions, government leaders and technocrats. What these actors deem politically and economically tolerable determines the pace and scope of decarbonisation.

The electricity sector provides the clearest expression of the new equilibrium. The Electricity Regulation Amendment Act and the creation of the National Transmission Company South Africa (NTCSA) lay the

[19] The PCC had noted that a 'fair share' 2035 target that took account of exceptional circumstances would be 345 Mt CO_2e, but recommended a range of 293 – 307 Mt CO_2e as more compatible with achieving net—zero by 2050.

groundwork for market liberalisation and substantial private investment in renewables. Yet governance remains fractured and reform is scattered and weakly coordinated (Krutham, 2025). The newly created Department of Electricity and Energy lacks the authority and technical depth to drive systemic reform; Operation Vulindlela and NECOM function primarily as 'unblockers' rather than strategic centres. Eskom's unbundling remains incomplete, with NTCSA still financially tethered to the holding company, distribution reform stalled, while Eskom Green's expansion into renewables raises concerns about entrenching monopoly control rather than dismantling it. In short, energy governance reflects the dispersed nature of the political settlement.

Despite governance weaknesses, market forces have accelerated clean energy uptake: renewables and battery costs have dropped dramatically, embedded generation has surged, and municipalities and firms have moved to secure their own capacity[20]. The final IRP 2025 projects large-scale solar and wind build-out, yet simultaneously slows coal decommissioning and incorporates ambitious gas and nuclear programmes — a compromise between decarbonisation advocates and fossil-fuel constituencies (Department of Electricity and Energy, 2025). This hybrid trajectory — rapid renewables alongside prolonged coal and new gas — reflects the logic of the new equilibrium: prioritise energy security and investor confidence while minimising disruption to the MEC accumulation model and employment dependencies.

The Just Energy Transition Partnership, emblematic of South Africa's climate leadership, functions primarily as a technical funding platform. The JET-SA quarterly reports describe the establishment of a JET Funding Platform within the Presidential Project Management Unit to match donors, DFIs and project developers. Yet disbursements remain slow, concentrated in grid and generation infrastructure rather than social investment or livelihood restoration (Krutham, 2024; The Presidency, 2024, 2025).

The earlier vision — linking mitigation finance with community resilience and worker transition — has narrowed to a bankability-driven model of green industrialisation. The Climate Change Act requires that policies reflect social justice priorities, but few JETP funds flow to community-centred initiatives. The PCC's proposed Just Transition Financing Mechanism (JTFM), designed to channel resources to smaller community projects, remains on the drawing table (PCC, 2024a).

Still, the JETP retains diplomatic and symbolic value: it sustains concessional finance access, signals policy continuity to investors, and aligns with government, donor and business preferences for private capital mobilisation . Under constrained fiscal and political conditions, government strategy has shifted toward consolidation rather than expansion of ambition.

[20] As of November 2025, there is approximately 12 GW of low-carbon electricity generation capacity on the national grid (21,8% of total generation capacity). This includes approximately 2,4 GW of renewable energy capacity added through bid rounds 1 – 6 of REIPPP. In addition there is approximately 7,4 GW of customer-installed PV capacity (household and large-scale embedded generation) (CRSES, 2025).

The new equilibrium is also characterised by a reordering of stakeholder relations. Participation in PCC processes has declined, with a noticeable drop off in government participation. Business has always favoured bilateral engagement with the state, for instance through NECOM[21]. Labour, disconcerted by Komati and weak implementation of just-transition commitments, has focused on defensive employment protection in core sectors. Civil society focuses on advocacy, mobilisation and litigation rather than partnership, and lacks the organisational leverage to shape policy direction.

Despite its limitations, the lower-ambition equilibrium is not without progress. South Africa now has comprehensive climate legislation, a functioning multi-stakeholder advisory institution, and a rapidly expanding low-carbon and renewable-energy base. The IRP's projected additions of solar and wind, combined with embedded generation, may reduce emissions intensity even without accelerated coal retirement. Incremental improvements in carbon taxation, adaptation planning and sectoral target-setting lay the groundwork for future scaling.

What remains unresolved — and the focus of the concluding section — is to what extent this new equilibrium represents a long-term reversion to the status quo, and whether the dynamism we have seen in the climate space allows for new constituencies to emerge capable of reinvigorating the just transition.

Conclusion: Prospects for Inclusive Climate Governance and a Just Transition

This paper has traced the evolution of South Africa's climate transition — from the emergence of a broad social consensus in the late 2010s, through the consolidation of inclusive institutions such as the PCC and the Just Transition Framework, to the fragmentation of this consensus and the consolidation of a lower-ambition equilibrium. Shifts in holding power explain why this trajectory unfolded as it did, and what it reveals about the relationship between climate governance, inequality and power.

Physical, technological and market shifts following the global financial crisis – growing climate impacts, falling clean-energy costs, rising carbon-risk exposure, shifting consumer and export markets, changing investor norms – started to disrupt MEC dominance and changed the incentive structure and holding power of constituencies. They also created opportunities for new coalitions to emerge, weakening established rent circuits and expanding the feasible space for reform. The inevitability of transition, the economic advantages of a proactive approach, and the need to do it in a way that minimised disruption and brought constituencies on board, brought social partners together around a just transition programme.

However, South Africa's formally inclusive but dispersed political settlement presented challenges to such a programme. The broad coalition of forces that made up the post-apartheid settlement, dominated by business, political and labour elites who have been able to monopolise economic rents, produced a selective form of inclusion:

[21] Personal communication, former NEDLAC official, November 2025.

insiders have enormous influence over transition outcomes, while emerging businesses, informal workers, the unemployed, rural communities and civil society actors struggle to translate voice into influence. The distributive aspects of the settlement are narrower than the social base, leading to a proliferation of informal and clientelist mechanisms of redistribution. The resulting fractures within the ruling elite have produced a state that is divided, incoherent and generally weak. As a result, just transition bargains have been implemented very slowly, if at all, and at times actively opposed. Where effective coordinating structures have been set up within government — NECOM, the JET-IP process – they have been dominated by technocrats and corporate actors, further eroding labour and civil society trust in the process.

PST gives us insights into why the consensus of 2018 — 2022 proved temporary. The distribution of benefits envisaged in the JTF did not take into account the actual balance of holding power. Incumbent coalitions — energy-intensive industries, SOEs, political actors and bureaucratic clusters – did not have sufficient interest in a low-carbon economic future and had limited incentives to prioritise social justice, while new green constituencies lacked the resources or cohesion to counterbalance them. As distributional implications sharpened, resistance coalesced and the settlement retreated to an equilibrium more aligned with established interests. The alignment of the 2010 to 2022 period was real, but it can best be understood as an elite compact that somewhat overreached and was brought back to earth by the institutional base of the settlement.

Historically PST analysis has tended to treat power configurations as determinant, even fixed, but more recent work has emphasised their dynamism, shaped not only by entrenched interests and the ebb and flow of holding power, but also by underlying technological change, new market forces and institutional innovation.

- As the deployment of low-carbon and climate-resilient technologies scales and costs drop, economic tipping points will drive market transformation, weaken the power of incumbents and engender new competitive forces. Van Doesburgh and Winkler note that properly sequenced green industrial policy, localised value chains and labour market / skills strategies can create a set of stepping stones that align powerful interests with low-carbon development through transitional rents and progressively shift the settlement over time.
- Institutions can expand the settlement itself. Perhaps the most important PST insight for South Africa is Levy's argument that institutions do not simply reflect distributions of power — they can transform them. Inclusive, participatory bodies such as the PCC can give previously excluded actors organisational capability, voice and legitimacy. Over time, this can shift holding power and widen the social foundation of the settlement. The PCC's participatory model and the Just Transition Framework created new opportunities for deliberation, but participation alone did not guarantee distributive outcomes. Implementation depended on state capability and the organisational strength of actors able to sustain pressure.

These dynamics mean that South Africa's just transition is not structurally predetermined by the minerals-energy complex. Power relations can change as new sectors grow, new technologies disrupt incumbents, and new institutions build the capacity of actors excluded from strategic decision-making. PST imperfectly captures these dynamics. Perhaps we need to restate the premise of PST from the perspective of the climate transition – a sustainable climate and development pathway requires agreement between the main economic and social actors around a configuration of political and economic institutions that generates an equitable distribution of costs and benefits.

The Just Transition Framework offers the clearest articulation of a potential long-term settlement: one in which the costs and benefits of decarbonisation are fairly distributed, and labour-market, industrial and social policies are aligned to create green growth, decent work and resilient livelihoods. It sketches the distributional mechanisms and institutional architecture needed to anchor a broad-based coalition around a low-carbon developmental path.

The difficulties of the current political settlement might mean that South Africa will forgo some opportunities from a more proactive stance on the green economy, and it will take longer to implement a just transition. But its path can be significantly enabled by a carefully constructed sequence of measures to incentivise the main economic actors along a pathway of transition. At the same time, new constituencies – green industrial players, unions which organise in low-carbon sectors, municipalities investing in distributed generation, community energy cooperatives, small producers and informal workers — must organise, acquire lasting capabilities, and assert claims over investment, ownership and employment in the transition. In other words, constituencies must fight for the just transition, not merely participate in it. A just transition will not happen of its own accord, and without it the political settlement will remain inclusive in appearance but exclusionary in effect.

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