



Institute For Economic Justice POLICY BRIEF



FROM LOCALISATION TO DECENT WORK: BUILDING AN INCLUSIVE RENEWABLE ENERGY INDUSTRY IN SOUTH AFRICA

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Executive summary

South Africa's rapidly growing demand for renewable energy and storage technologies, including solar, onshore wind, and battery storage, has yet to translate into meaningful local manufacturing growth or job creation. Instead, much of this demand continues to be met through imported products, particularly low-cost imports from China.

The renewable energy industry also creates precarious jobs often characterised by short-term contracts, limited job security, and inadequate social protection. These conditions fall short of decent work standards, in effect creating low job quality in the sector.

Inclusion is an equally pressing challenge. Women remain significantly underrepresented and continue to face occupational segregation across the renewable energy production networks.

As a result, the country is missing a critical opportunity to use the energy transition as a catalyst for transformation, industrial development, and employment creation. Achieving these objectives requires the localisation of renewable energy technology production alongside sustained demand for locally produced goods.

To leverage renewable energy for inclusive economic development, South Africa must establish sustained local demand while simultaneously pursuing an inclusive localisation strategy. Together, these measures can drive local industrial development and decent job creation.

Achieving this will require:

- 1 Strengthening cross-government coordination and implementation of policies to support the renewable energy industry
- 2 Ensuring sufficient demand and localisation through introduction of green industrial policy instruments such as the reinstatement of Section 12i incentives (tax incentives for companies that invest in new or expanded manufacturing capacity)

3 Aligning industrial incentives, such as Section 12i incentives, with decent work objectives (making industrial policy support conditional on decent job creation)

4 Developing an inclusive skills base through renewable energy-focused training initiatives and TVET programmes that incorporate gender quotas

5 Ensuring gender-responsive action plans in both public and private procurement processes

6 Establishing a national decent work charter that reflects South Africa's just transition ambitions.

The development of an inclusive and locally rooted renewable energy production network presents a significant opportunity to address South Africa's persistent challenges of unemployment, poverty, and inequality, while supporting a sustainable and resilient low-carbon economy.

1. Introduction

Demand for renewable energy and storage technologies reached an all-time high in 2023, driven mainly by the need to close the energy gap (load shedding) in South Africa. This demand is expected to remain high in the short term. For example, the Western Cape province foresees a demand of R37.4 billion in 2030, equivalent to 2.35 Gigawatts (GW) of new renewable energy capacity, across wind, solar, and battery storage.¹ Despite growing demand, sufficient levels of good

quality jobs are not being created in these sectors. Instead, rising local demand has largely been met by an influx of cheap, low-standard imports, mainly from China.

This lack of locally sourced manufacturing inputs was confirmed in a detailed four-year study undertaken by the Institute for Economic Justice (IEJ) and partners. The research mapped the policy landscape² and global production networks for solar PV, wind, and batteries,³ conducted firm- and worker-level surveys and interviews, and compiled a detailed country case study.⁴ Imports of renewable energy and storage products reached a record high of R70 billion in 2023, driven by government incentives to address the energy crisis in South Africa.⁵ Imports subsequently slowed down in 2024 and 2025 (see also Figure 1 below).⁶

Local manufacturers also rely heavily on imported component and intermediary parts. IEJ's survey of nine South Africa-based manufacturers in the sector showed a strong reliance on sourcing inputs from international suppliers. Two firms indicated that less than 25% of their inputs were sourced locally, while two others identified large or foreign firms as their suppliers. This continued dependence on imported inputs throughout the production networks has significant implications for localisation and sustainable job creation within the renewable energy sector.

At the centre of this challenge is the missed opportunity to localise production and create decent jobs. While decent job creation is referenced in key policy frameworks such as the South African Renewable Energy Masterplan (SAREM), implementation has yet to materialise. Interviews conducted by IEJ with industry experts and with 60 workers revealed that employment in parts of the renewable energy sector is precarious, characterised by short-term contracts, often lasting three months or less, with limited or no social protection benefits such as medical aid, despite workers operating in high-risk environments, including rooftops and elevated structures. This is driven in part by the lack of secure demand for

local manufacturing, which creates a survivalist environment that contributes to poor job quality. These conditions fall short of the International Labour Organization (ILO)'s definition of decent work and raise concerns about the quality of jobs being created through the energy transition.⁷

Inclusion also remains peripheral to the development of renewable energy production networks. Women's participation in the sector remains low: in 2021, women accounted for only around 10% of employment in the downstream renewable energy sector under the Renewable Energy Independent Power Producer Procurement Programme (REIPPPP) Bid Windows 1–4.⁸ Given that the manufacturing segment of the renewable energy industry is still in its early stages of development, inclusion should not be treated as an afterthought but should instead be embedded as a core objective in policy design, industrial development strategies, and project implementation.

Against this backdrop, this policy brief examines how sustained demand and inclusive localisation can support the creation of decent jobs across renewable energy production networks. The policy brief highlights that if there is no sustainable local demand in renewable energy products, and there is no enabling industrial policy environment for firms to thrive, decent jobs in the sector will not be created.

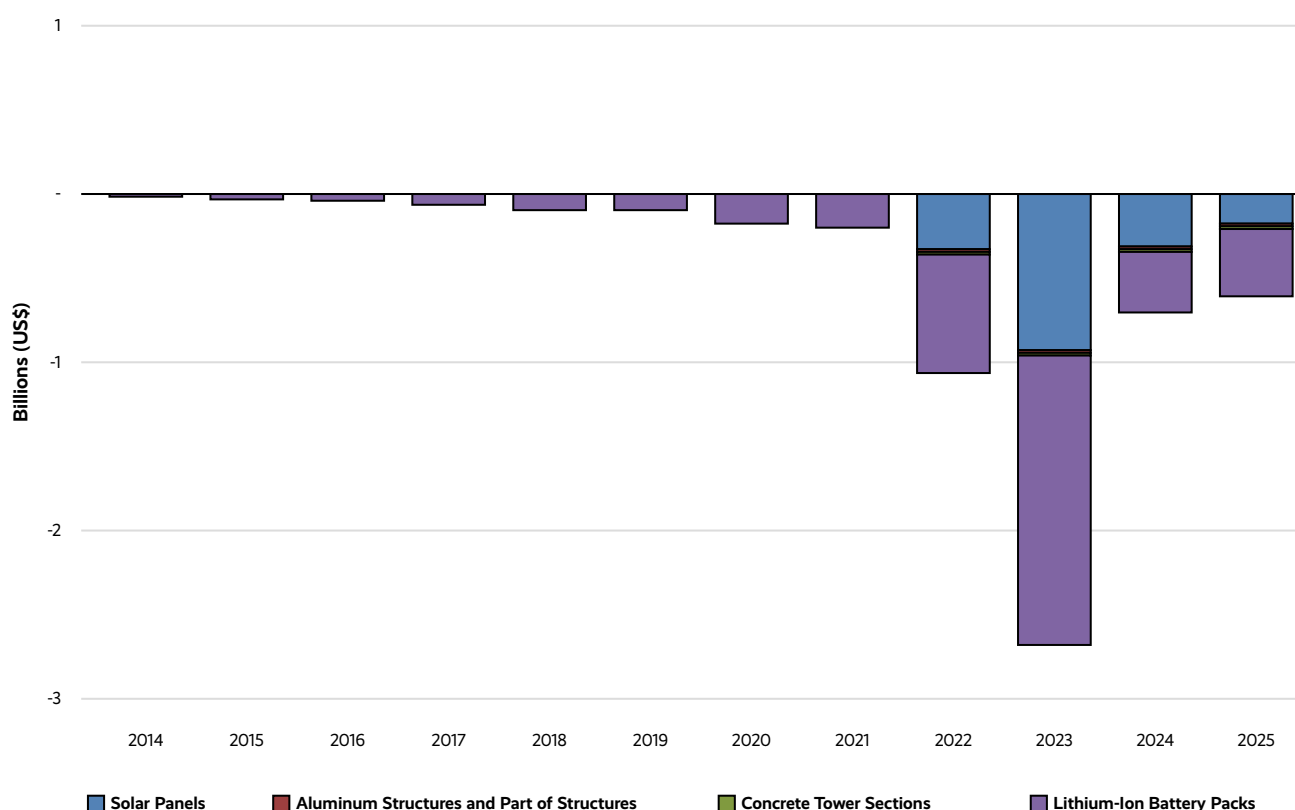
The policy brief begins by examining the factors constraining demand for locally manufactured renewable energy technologies, looking at the market dynamics and productive capabilities of the renewable energy production networks. It then examines the institutional and governance gaps that reinforce these constraints. This is followed by an assessment of the quality of jobs created across renewable energy production networks and the barriers to women's participation. Finally it brings these issues together in a proposal for a framework centred on inclusive localisation and the creation of sustainable demand, domestically and regionally.

2. Why growing renewable energy demand is not driving local manufacturing

The increase in demand for renewable energy and storage products in 2023 was primarily driven by policy support measures introduced in response to loadshedding between 2022 and 2023 to stabilise South Africa's energy system.

Figure 1 illustrates the trade balance of selected renewable energy and storage products in South Africa from 2014 to 2025.

Figure 1. Trade balance of selected renewable energy products (2014-2025)



Source: UN Comtrade, calculations in Alexander.⁹

The persistently negative trade balance highlights South Africa's strong reliance on imports to meet local demand for renewable energy and storage products. The sharp increase in imports could (given suitable local capabilities and capacity) be replaced with local production.

Key barriers to sustainable local demand in the renewable energy production networks include lock-in to the existing energy system and the costs of switching; local industry's inability to compete on price with international firms; stop-

start public procurement; and key global firms' reliance on international suppliers, limiting opportunities for South African firms.¹⁰

Lock-in to the existing energy system: The energy sector in South Africa is resistant to change. This is reflected in South Africa's uneven and stop-start shift towards renewable energy. The shift towards renewable energy accelerated in the years leading up to 2023, largely driven by load shedding and the policy measures introduced by the South African government to stabilise the

energy system. It peaked that year and subsequently slowed. Much of this growth comprised rooftop solar, particularly small-scale embedded generation. As a result, the energy sector has largely remained heavily dependent on a fossil fuel grid; this has slowed demand for renewable energy products, as the decline in imports in Figure 1 above indicates.

The cost factor: The cost of producing renewable energy products in South Africa is higher than that of many international competitors, which has contributed to difficulties in market penetration by local manufacturers.¹¹ Firms interviewed by the IEJ indicated that labour costs, stringent standards, a preference for international suppliers, and the opening of the renewable energy market have all increased the cost of locally produced renewable energy components and subcomponents. For example, although South Africa processes raw materials into steel, aluminium, and polymers, import-parity pricing structures substantially reduce the potential raw-material cost advantage available to downstream manufacturers.

Stop-start public procurement: Demand levels in recent years have fluctuated significantly, driven by the stop-start implementation of public procurement programmes. This has undermined business confidence in the sector. Erratic and delayed public procurement pipelines leave local manufacturing capacity underutilised and can discourage investment. This affects potential sales into public procurement supply chains, which is an important market for manufacturers. This uncertainty has made it difficult for producers to plan and invest effectively.

Established supplier relationships: Global project implementers, including some Independent Power Producers (IPPs) and Engineering Procurement and Construction (EPCs) often have established relationships with existing (often international) suppliers, which they may prefer to maintain rather than developing new partnerships with South African suppliers. In addition, some global firms are vertically integrated

and source inputs through their own subsidiaries.

In addition to the demand challenges outlined above, the renewable energy production networks in South Africa face challenges related to local capabilities. These include skills and training deficits. Where training programmes have been implemented, they have not always aligned with available employment opportunities. For example, firms continue to struggle to fill specialised roles in the renewable energy sector, despite training provided by Technical and Vocational Education and Training (TVET) colleges. In some cases, individuals have received training for clean energy occupations but have subsequently been unable to secure employment, because demand is concentrated in specialised roles for which they have not been trained.

Certain capabilities required across the renewable energy production networks remain limited or absent in South Africa. For example, domestic capacity for the production of solar and battery cells is either constrained or non-existent. These require advanced manufacturing capabilities that South Africa still has to develop.

Many domestic firms also have insufficient awareness of the support mechanisms available to them. For example, the dtic provides incentives for firms to increase their competitiveness and job retention, such as the Manufacturing Competitiveness Enhancement Programme (MCEP), and some firms in the renewable energy sector indicated that they are not aware of such a programme. One firm surveyed indicated that it was not aware of any support programmes from which it could benefit.

While the renewable energy production networks have significant potential for job creation, this potential is not being fully realised due to such persistent constraints. These constraints are compounded by institutional and governance gaps that undermine sustained demand for manufactured renewable energy components and subcomponents and contribute to poor employment outcomes.

3. Policy and governance failures constrain localisation

Institutional and governance gaps that contribute to these constraints include weak impact of local content policies, lack of policy coordination and regulatory clarity (leading to delays), and trade and tariff misalignment.

First, the routine evasion of local content requirements during public procurement processes, often with the explicit condonation of government authorities seeking to fast-track generation capacity,¹² has undermined the development of local capacity, employment, and skills. While the state's centralised REIPPPP framework legally mandates strict localisation scorecards, international project developers and IPPs utilise porous legal loopholes and post-bid exemptions to bypass domestic manufacturers.

Second, challenges with coordination amongst government departments hinder the development of renewable energy production networks in South Africa. For example, the dtic, which is responsible for driving industrial policy, does not align with the Department of Electricity and Energy (DEE). The departments work in silos, creating separate policy documents without any evident attempt to align their policies. So, the industrial development strategy approved in 2026, for example, is not aligned with the objectives of SAREM despite SAREM being an industrial development framework for renewable energy.

One possible area of alignment is the reinstatement of the Section 12i incentive programme, a government programme designed to support greenfield and brownfield industrial manufacturing projects through capital investment and worker training. However, the strategy does not clearly specify priority sectors, the types of firms that qualify, or whether support extends to greenfield or brownfield projects. Current indications suggest that Section 12i may prioritise green hydrogen projects.

Although the strategy identifies alignment with SAREM as a key action under the decarbonisation pillar, neither the pillar nor SAREM's role in it is clearly defined. In particular, the relationship between decarbonisation, electricity, and industrial development is not clearly articulated, and SAREM does not appear to be meaningfully integrated into the wider industrial development strategy. This lack of policy clarity risks delaying support for the industrialisation of green technologies and may result in SAREM being treated as peripheral to, rather than as a central coordinating component of, the country's re-industrialisation agenda, especially for renewable energy components and subcomponents. This underscores the need for the dtic to develop a dedicated green industrial policy framework, or a more detailed decarbonisation framework, that explicitly prioritises green industrialisation and decent job creation.

Third, the mismatch between trade and tariff policies undermines the development of domestic renewable energy production networks. Current trade and tariff arrangements do not consistently support the development of competitive domestic renewable energy manufacturing. Many renewable energy products come into South Africa tariff-free, providing no protection for the development of the domestic renewable energy industry. Finished renewable energy products may also enter South Africa at relatively low tariff rates through staged consignment, whereby large pieces of capital equipment, machinery, or entire industrial plants are imported in multiple separate shipments over time, but are cleared under a single tariff classification code. This often leaves domestic manufacturers facing high input costs and limited protection during the early stages of industrial development.

Institutional and governance gaps which delay the development of domestic renewable energy manufacturing capacity will constrain localisation and increase South Africa's reliance on imported finished renewable energy products to meet growing domestic demand. These imports are

often cheaper and of lower standards, which further erodes the potential for local manufacturing development and job creation. In turn, this undermines broader national objectives of reducing unemployment, poverty, and inequality.

Policy delays (with lack of coordination being the biggest feature) also risk slowing South Africa's progress towards a just energy transition. Failure to industrialise and localise renewable energy production networks results in both direct and indirect job losses. Continued dependence on cheap, low-standard imports will undermine opportunities to benefit South Africa's abundant critical mineral resources, particularly those linked to battery technologies, while limiting the country's ability to build a competitive renewable energy manufacturing base that can serve both domestic and regional markets. Most importantly, it will constrain the creation of value for both local firms and workers, which is essential for delivering a just and inclusive energy transition.

These market and policy constraints not only limit localisation but also affect the number and quality of jobs created across renewable energy production networks.

4. Decent work deficits in renewable energy production networks

The upstream (raw material extraction) and downstream (construction, installation, operation, maintenance, and circularity) segments remain the most labour-intensive components of the renewable energy production networks.¹³ However, employment in many of these activities (with the possible exception of operation, maintenance, and circularity activities) is precarious and short-term, with inadequate social protection. While the upstream and downstream segments create jobs in the hundreds of thousands, the manufacturing segment remains critical for the

creation of long-term, decent jobs. This includes the beneficiation of critical minerals such as vanadium and lithium, as well as the assembly of key components such as solar modules and wind nacelles. In 2021, this segment created approximately 2 500 jobs, with the potential to generate up to 25 000 local decent jobs by 2030.¹⁴

While there is a significant opportunity for job creation as SAREM is implemented, it is important to understand what constitutes decent work. According to IEJ's [Conceptual Framework for a Just Energy Transition](#), which draws on the ILO definition, decent work is built around four key pillars:¹⁵

- **Employment creation** refers to waged employment where wages are sufficient to cover living costs and exceed the minimum wage.
- **Social protection** includes protection against unemployment, illness, disability, loss of income during maternity, and destitution in old age. This encompasses access to unemployment insurance, medical aid, paid maternity and paternity leave, and pension fund contributions.
- **Workers' rights** include the right to a safe and healthy workplace, compliance with basic conditions of employment, protection from child labour, and freedom from coercive working conditions, such as excessive working hours without adequate breaks.
- **Social dialogue** includes the right to organise (labour unions), engage in collective bargaining, and participate in decision-making processes that affect workers.

Jobs in South Africa's renewable energy production networks remain overwhelmingly temporary (three months or less), and are concentrated in entry-level construction activities, creating a structural imbalance that is inconsistent with decent work standards.¹⁶

Moreover, the quality of employment faces

challenges beyond job security. Workers across the renewable energy production networks report long working hours and physically demanding conditions. In particular, workers in manufacturing activities have reported standing for up to 12 hours without breaks, raising concerns about occupational health and well-being. While the sector is still new and mainly creating precarious jobs, unionisation rates are very low or non-existent, limiting workers' ability to engage and collectively bargain on issues in the workplace, such as health.

In many cases, workers in South Africa's renewable energy production networks do not receive the benefits to which they are entitled, including unemployment insurance and retirement contributions. Some workers also report not receiving copies of their employment contracts or payslips, limiting their ability to access financial services such as credit. In addition, workers are often exposed to workplace safety risks, particularly in the rooftop solar industry, where the risk of accidents remains a significant concern.¹⁷

What is clear is that, across the four pillars defining what a decent job looks like, the South African renewable energy production network fails on all criteria: jobs are precarious, characterised by short-term employment, little social protection, poor health and safety standards, and lack of social dialogue between workers and employers.

Job quality is only one dimension of a just transition; who has access to these jobs matters too.

5. Women remain excluded from many renewable energy opportunities

Women in renewable energy production networks remain underrepresented despite the sector's

potential to contribute to structural transformation of the economy. In the downstream segments of the South African renewable energy production network, women accounted for approximately 10% of employment in 2021.¹⁸ Women also remain underrepresented in manufacturing roles. For example, a tower manufacturing company in South Africa reported that only 7% of its permanent positions were occupied by women.¹⁹ Despite this, the manufacturing segments of the production network — particularly beneficiation and assembly — present an opportunity to increase women's participation. In particular, as domestic manufacturing and assembly continue to develop, gender inclusion can be built into employment and skills development from the outset rather than addressed after existing patterns of exclusion have become entrenched.

Interviews and industry assessments further reveal that women face significant systemic barriers to entry and career progression, particularly on factory floors and in operational environments.²⁰ Empirical evidence shows that, while women comprise 33% of the overall wind and solar workforce in South Africa, they occupy only 19% of director-level positions, with senior executive leadership remaining 80% male.²¹

The picture, however, is not homogeneous, with evidence from IEJ's firm survey suggesting that women's participation is more substantial in some companies. All surveyed firms reported employing women. Three of the nine companies indicated that women constituted more than half of their workforce. Five companies reported having a gender policy in place; two indicated that they were in the process of developing a gender policy; while two reported having no gender policy. Interviewees also shared diverse perspectives on women's employment within the sector. Workers at a renewable energy facility reported seeing women employed across a range of roles, while a management-level respondent described women working in assembly, battery production, and engineering positions in their factory.

Despite these examples, many aspects of the

industry continue to be shaped by gendered assumptions and stereotypes. Interviews with solar industry workers revealed that on production floors, work is often allocated according to traditional stereotypes: men are seen as better suited to physically demanding warehouse and lifting tasks, while women are assigned more delicate assembly functions, such as handling solar cells and barcode scanning. Female workers also reported that certain technical and engineering functions, such as high-voltage terminator welding, are often regarded as too complex or physically demanding for women, limiting their access to financially lucrative, higher-skilled roles and career progression opportunities.

Although women have gained a foothold in renewable energy production networks, stereotypes about women's suitability continue to create barriers to participation and advancement, excluding many women from benefiting fully from opportunities in these emerging industries. This contributes to the underrepresentation of women in technical, leadership, and higher-paid occupations, with women often concentrated in lower-paid administrative and support roles despite having the skills and capacity to perform technical work.

6. Linking localisation and sustained demand to decent job creation

Two broad pathways for South Africa's energy transition remain possible: (1) an import-dependent transition, in which growing demand for renewable energy is met primarily through imported technologies and components; and (2) a localisation-driven transition, in which that demand is used to build domestic productive capacity, strengthen local firms, and create decent jobs. The current import-dependent energy transition entails significantly more long-term costs than benefits. The primary advantage of this approach is the rapid expansion of renewable

energy deployment through increased availability of manufactured products. However, the associated employment benefits are largely realised elsewhere, with only limited short-term jobs created locally in downstream activities. At the same time, domestic renewable energy firms struggle to compete against imported manufactured products, limiting the development of local industries.

By contrast, the localisation of renewable energy production offers greater long-term benefits, albeit with certain short-term costs and challenges: jobs would be created at a slower pace than if there was no localisation; the required policy and supportive industrial measures may take time to implement; and there may be delays in aspects of the energy transition. However, the long-term benefits are substantial. With sustained demand from the state and the private sector, localisation can support the development of sustainable industries. This can create decent and secure local jobs, strengthen domestic industrial capabilities, and ensure that inclusion becomes a central pillar of the energy transition. In this way, localisation provides a pathway not only to decarbonisation but also to broader social and economic transformation.

Recommendations

These recommendations are designed to ensure that the localisation of renewable energy manufacturing results in long-term decent job creation. Central to this objective is the creation of sustainable demand for renewable energy products by the private and public sectors, both domestically and regionally.

1 Strengthening cross-government coordination and implementation of policies to support the renewable energy industry

Establish mechanisms for policy coordination. This is a critical step in ensuring that sustainable demand is created and localisation is implemented across the renewable energy production networks, potentially creating decent local jobs. Start by aligning SAREM and the industrial development strategy; this could be beneficial for the industrialisation of renewable energy production networks. Greater coordination would improve policy coherence, reduce duplication, and provide greater investor certainty while ensuring that objectives are pursued in a complementary manner. Use SAREM as the implementation anchor for coordinating green industrial policy across government.

2 Ensuring sufficient demand and localisation

Drive inclusive localisation while creating sustainable local demand for renewable energy products. Together, these measures can support the creation of decent, long-term employment in renewable energy manufacturing. Key interventions should include the introduction of tariffs on selected renewable energy products by the International Trade

Administration Commission (ITAC); the accelerated reinstatement of the Section 12i incentive programme by the dtic, with greater clarity on priority sectors and the types of firms eligible for support; strengthened enforcement of local content requirements through increased verification capacity within the dtic; and the streamlining of public procurement processes for renewable energy products by the National Treasury (for more on this, see IEJ's *The State of Local Content in South Africa's Renewable Energy Market*).

3 Aligning industrial policy with decent work

Align policy instruments explicitly with decent job creation objectives and make support for the manufacturing of renewable energy products conditional on firms meeting these objectives. As noted in IEJ's submission to the Public Procurement Act amendment process in 2026, this could include defining job creation criteria as part of local content enforcement measures.²² In addition, local content requirements should be linked to meaningful commitments by manufacturers to create and sustain decent work as a condition for continued public support and industry incentives. This would ensure that localisation policies contribute not only to industrial development but also to

improved employment outcomes and a more just energy transition.²³

4 Develop and Implement a Gender Action Plan for renewable energy production networks

Embed gender inclusion across renewable energy production networks, particularly within manufacturing and factory-floor occupations. This requires linking industrial policy objectives to inclusive decent job creation, supported by clear and measurable targets for women's participation. This should include establishing women's employment and leadership targets for firms receiving Section 12i incentives in the renewable energy sector; setting women's participation targets within public procurement programmes for renewable energy; and introducing gender targets in private-sector procurement processes, with appropriate oversight mechanisms to monitor compliance. In parallel, implement awareness campaigns highlighting women's participation in renewable energy industries to challenge persistent stereotypes, such as the perception that women cannot operate heavy machinery or undertake technical and engineering work.

5 Expand TVET programmes with ring-fenced gender quotas Require the Energy and Water

Sector Education and Training Authority (EWSETA) to reallocate funding away from utility monopolies and towards decentralised, demand-led technical training programmes delivered through local TVET institutions. These programmes should be linked to gender equity and social inclusion targets, addressing critical skills shortages while creating pathways for women to enter advanced technical and engineering careers.²⁴ In addition, training programmes should be prioritised in regions targeted for renewable energy investments to ensure that local communities are able to benefit from emerging employment opportunities in renewable energy production networks.²⁵

6 Develop a decent work charter for the renewable energy sector Develop a decent work charter for the renewable energy and storage sectors, negotiated between government, organised labour, and industry. There is also a need to improve the transparency and standardisation of employment data collection and reporting across the renewable energy sector to better support labour market planning and industrial policy coordination. One way to achieve this would be for such a charter to establish common standards and commitments relating to employment quality, worker protections, and social dialogue

across the sector. It should also address how employment is measured and reported, including a shift towards reporting the actual number of people employed rather than relying solely on job-year estimates.²⁶ This would provide a more accurate picture of the sector's contribution to employment and support efforts to advance a just energy transition.

Endnotes

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