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Ruth Bookbinder

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Politicising energy transitions: the political economy of reducing dependence on coal in South Africa's minerals energy complex

Ruth Bookbinder ^{a,b}

^aCentre for Responsible Business, Department of Management, Birmingham Business School, University of Birmingham, Birmingham, UK; ^bVisiting Research Fellow, School of Politics and International Studies, University of Leeds, Leeds, UK

ABSTRACT

Proposals to reduce South Africa's dependence on coal-generated electricity have repeatedly stalled despite growing internal and international pressure to decarbonise electricity generation. Where there is a growing body of scholarship that identifies barriers to an energy transition in the country, studies that explore how these barriers emerge and are perpetuated are comparatively limited. This paper contributes to this scholarship by looking beyond the energy sector to analyse unresolved debates over how to achieve post-apartheid developmental goals influence access to – and the distribution of – government resources. The paper then shows how in the energy sector different actors use narratives around development to advocate for and oppose measures to restructure the national electricity company and increase procurement of privately generated renewable energy. As well as contributing to South Africa-specific scholarship, this paper provides insights into how resistance to western-funded energy transitions may emerge in other areas in the Global South.

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1. Introduction

South Africa is among the most coal-dependent countries in the world, with coal accounting for over 80% of the country's electricity mix (Eskom 2020). This dependence on coal means that South Africa reports the largest carbon dioxide (CO₂) emissions in Africa and is the 14th largest emitter of CO₂ in the world (World Bank 2023). Meanwhile, Eskom – the state-owned electricity company – is heavily indebted and is unable to guarantee reliable or affordable access to electricity.¹ In 2023, the country experienced almost 7,000 h of scheduled power cuts (loadshedding), significantly worse than

CONTACT Ruth Bookbinder  r.i.bookbinder@bham.ac.uk

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the 3,700 h recorded in 2022 (Janse van Rensburg and Morema 2023, The Outlier 2024). The central bank estimates that loadshedding reduces GDP growth between 0.7% and 3.2% points per year, underlining the economic impact of the country's electricity crisis (Janse van Rensburg and Morema 2023). Eskom has also been at the centre of allegations of 'state capture', due to the mismanagement of procurement at the company, exacerbating structural problems – such as ageing infrastructure – that have contributed to loadshedding.²

The South African government signed a multi-country Just Energy Transition Partnership (JETP) for US\$8.5 billion in initial funding to accelerate an energy transition at COP26 in November 2021. The JEPT was the first agreement of its kind, making South Africa an important case study for international financing to support energy transitions. This funding mitigates some of the challenges that Eskom's dire financial position presents. However, the first major energy policy after the end of apartheid outlined the need to increase renewable energy production and restructure Eskom, pointing to wider political dynamics that constrain reform (Government of South Africa 1998). It is therefore vital to understand the dynamics that shape responses to and acceptance of foreign financing to restructure South Africa's energy sector.

Research into South Africa's energy transition identifies the long-standing linkages between the state through Eskom and private mining companies – which is the basis of the minerals energy complex (MEC) – as one of the biggest barriers to change (Baker 2015, Ting and Byrne 2020, Tyler and Hochstetler 2021, Barnes 2022). Yet more work is needed to understand how barriers to change within the MEC emerge and are maintained. To address this gap I respond to the following research questions:

- (i) How does elite competition for rents impact efforts to restructure the energy sector?
- (ii) How do elites' use of transformation narratives shape the political economy of the energy sector?

I argue that competition between elites to access rents (broadly defined as income above what an actor would receive in a competitive market) at Eskom has worked to establish the MEC as a site of class formation in post-apartheid South Africa.³ Elites have used narratives around transformation – a catch-all phrase that describes efforts to tackle apartheid's legacy – to justify access to these rents and articulate opposition to reforms that may erode the MEC's relevance. Ongoing interest in preserving the MEC is compounded by unsettled debates over how to tackle apartheid's legacy, contributing to a sense of confusion over how a 'just' transition could be realised in practice. For instance, proponents of renewable energy projects also use these

narratives to challenge the structure of the MEC and advocate for a ‘just transition’. The paper thus sheds light on how unresolved debates over how to address colonial legacies can politicise energy transitions and influence responses to Western-led initiatives to tackle the climate crisis. To make this argument, I set out the paper’s analytical framework before discussing approaches to ‘transformation’ in the MEC and their role in preserving the MEC as a site of rents in the post-apartheid period. Finally, I discuss how actors use these narratives in debates over renewable energy sources and their implications for South Africa’s energy transition.

2. Politics and energy transitions

Research into the politics of energy transitions acknowledges the necessity of understanding how power dynamics can accelerate and hinder energy transitions (Avelino and Rotmans 2009, Geels 2010, Newell 2021, Palle 2021). For instance, Ford and Newell use Gramsci’s concept of *transformismo* to explain how ‘incumbent actors ... accommodate radical pressures ... to ensure that shifts which do occur in socio-technical configurations do not disrupt prevailing social relations and distributions of political power’ (Ford and Newell 2021). Others have used a Gramscian framework to characterise the MEC as a ‘historical bloc’ influencing South Africa’s energy transition, describing the MEC as an incumbent actor contributing towards barriers to reform (Baker 2015, Ting and Byrne 2020, Tyler and Hochstetler 2021).

Understanding the dynamics within the MEC is critical to understanding South Africa’s energy transition, but it is important to contextualise these dynamics within the wider political context to better know why they are so resilient to change. Mirzania *et al.* (2023) note a gap in research into the ‘perspectives of key stakeholders and socio-political factors’ that are influencing an energy transition in South Africa. Their interview data confirms the importance of the MEC and ‘techno-economic’ factors as a barrier to a ‘just transition’ (Mirzania *et al.* 2023). However, their study remains focused on the immediate dynamics around the energy transition and the impact of the wider political context remains underdeveloped.

It is therefore necessary to consider the international and domestic pressures that shape the political economy of energy sector reform in South Africa. For instance, international pressure to adopt renewable energy technologies contributes to an unequal balance of power between South Africa and western funders. This concern is not exclusive to South Africa or energy transitions. Anantharajah (2021) notes how climate funding is dependent on regulatory ‘reforms’ to satisfy western donors. There are also growing concerns around ‘green colonialism’, such as the dispossession of communities for climate projects (Kårtveit *et al.* 2021), demand for commodities needed to

produce low-carbon technologies (Dorn 2022), and unequal access to carbon markets (Kumar *et al.* 2021).

Market-based approaches to energy transitions are associated with privatised delivery of electricity and technologies that are often not produced in the Global South. This reduces the affordability and the viability of these technologies in the long term if they cannot be repaired locally, underscoring the risk that an accelerated, market-driven energy transition will be unjust (Kumar *et al.* 2021). In addition, the privatisation of the energy sector also risks excluding poorer customers who are unable to pay for services (Newell and Phillips 2016). The privatisation of the energy sector in a developing country can also result in a contradictory situation where the government is working to meet developmental objectives and target energy poverty while appeasing donors and investors (Newell and Phillips 2016). Meeting development goals will likely overlap with demands for distributional and restorative justice – critical aspects of a ‘just’ transition – further underlining the need to understand how wider political objectives shape prospective energy transitions.

3. Liberation narratives and transformation in South Africa

In post-apartheid South Africa, development objectives are inextricably linked to the governing African National Congress’s (ANC) position as a liberation party in power. Liberation parties often pledge to transform the country, presenting themselves as the only party capable of delivering these promises (Reno 2002, Dorman 2006, Paget 2020). Once in office, these parties use the idea of an incomplete liberation to justify their ongoing leadership and counter political opposition, using nationalistic and developmental characteristics of liberation narratives to frame critics as counter-revolutionary (Beresford *et al.* 2018, Paget 2020). Parties have used liberation narratives to justify increasingly authoritarian behaviour or the allocation of rents (Paget 2020).

The ANC frames itself as the only legitimate leader of an ‘ongoing national democratic revolution’ to ‘transform’ the country (Beresford *et al.* 2018). The ANC has also justified the allocation of rents to potential voters and political elites as a method of redistributing wealth to tackle apartheid’s legacy of inequality. This allocation of rents to serve a government’s developmental objectives is not unique to South Africa and can have positive economic outcomes (Khan and Jomo 2000, Kelsall 2013). It can also serve to reinforce a party’s relationship with voters, with the ANC cultivating a ‘familial’ relationship with voters, framing rights such welfare grants as a rent that the ANC is uniquely placed to distribute (Booyesen 2012, Ferguson 2013).

However, depending on specific sources for rents can make it harder to implement reforms that may disrupt rent-seeking practices. For instance, Ickler argues that using oil rents for development has entrenched an ‘extractivist’ economy in Ecuador, hindering efforts to pursue an energy transition (Ickler 2023). There are clear parallels between this example and South Africa where demands for rents in the MEC is a critical barrier to an energy transition.

The MEC initially described the structure of the South African economy where cheap, coal-generated electricity supported export-oriented industries such as mining and manufacturing (Fine and Rustomjee 1996). Eskom occupies a central role in the MEC as a nexus between different sectors as well as state and private sector interests. The collection of political and economic interests seeking rents in the extractive sector is similar to the petro-state and overlapping ‘oil complex’ in Nigeria. However, it is important to note that where Watts (2005) describes the petro-state as displacing non-oil sectors, the MEC has adapted to retain its relevance as a source for rents even as its direct economic contribution shrinks.

The MEC is a particularly important source of rents for aspirant black business elites who benefit from black ownership and employment quotas that are part of government procurement requirements (Bowman 2019). These quotas are part of ‘black economic empowerment’ (BEE) strategies to ‘transform’ the economy after the end of apartheid. When the ANC came into government, the party was juggling pressure to redistribute wealth while under pressure to conform to neoliberal norms (Bond 2000). Party elites, including then-deputy President Thabo Mbeki, consequently looked to black elites to act as a ‘motive force for transformation’ through preferential access to state contracts (African National Congress 1997, Iheduru 2004).

Competition for state contracts has contributed to an increase in corruption around public procurement. Several researchers have described malpractice in BEE procurement as a new form of corruption in comparison to apartheid-era practices, linking this development to class formation and political factionalism in the post-apartheid state (Lodge 1998, Hyslop 2005, von Holdt 2019). BEE has also had limited success in reducing inequality (African National Congress 2007, Southall 2007, Bracking 2019). Government statistics reported that in 2003 71% of BEE deals included at least one of six ‘BEE heavy-weights’, including current president Cyril Ramaphosa (quoted in Southall 2013). More recent statistics also indicate that over 60% of senior management at firms are white, despite white people accounting for around 8% of the workforce (Commission for Employment Equity 2023). Levels of unemployment are also higher among black South Africans, reflecting the limits of transformation in the labour force (Statistics South Africa 2024).

As well as failing to redistribute wealth to act as a ‘motive force for transformation’, expensive and ineffective procurement agreements at Eskom have contributed to the increased frequency and severity of load-shedding (Chipkin *et al.* 2018). Hochstetler (2020) argues that the ‘corrupt commitment’ for nuclear power during Jacob Zuma’s presidency led to delaying renewable energy procurement programmes. Zuma’s efforts to delay the renewable energy procurement programme also coincided with the expansion of narratives around ‘radical economic transformation’ (RET) and the need to combat ‘white monopoly capital’. These narratives draw on the ‘emancipatory ideas’ of the anti-apartheid struggle which challenged the role of white capital in propping up the apartheid regime (Beresford *et al.* 2023). However, Zuma and his faction – with the assistance of UK public relations firm Bell Pottinger – repurposed these narratives to justify extractive rent-seeking practices at SOEs. Within these narratives, deviating from public procurement regulations works towards RET by challenging ‘white monopoly capital’ and correcting historic injustices (Desai 2018, Chipkin *et al.* 2018). The way that Zuma’s faction used RET highlights the coercive potentials of narratives around transformation and how these narratives are used to shape the energy transition. This paper contributes to a wider scholarship on power and the allocation of resources in the post-apartheid state by linking rent-seeking in the MEC to unresolved debates over how to achieve ‘transformation’.

4. Methods

My findings are based on narrative analysis of 30 key ‘informant interviews I conducted in South Africa from October 2018 to May 2019, and remotely in 2020 as part of my PhD research. Interviewees included current and former Eskom managers and executives, members of government energy task teams and discussion forums, and energy experts at transparency NGOs. Interview data provides personal accounts of rent-seeking processes and how debates around the energy transition are politicised. Interviews covered sensitive topics while a public inquiry into corruption allegations at Eskom (and other state-owned enterprises (SOEs)) was ongoing. It is therefore probable that interviewees made statements to justify their actions or separate themselves from activities which would be criticised. Despite this limitation, by interviewing people who have first-hand experience in rent-seeking at Eskom the paper includes data that is not often considered in research on South Africa’s energy transition and is part of the paper’s empirical contribution (Mirzania *et al.* 2023).

I supplemented interview data with documentary analysis of national and ANC policy documents, reports, and evidence bundles from public inquiries.

Analysis of testimonies made during a parliamentary inquiry into procurement practices at Eskom and the commission of inquiry into ‘state capture’ (hereafter the Zondo Commission⁴ after Chief Justice Raymond Zondo, who presided over the inquiry). Claims made during the Zondo Commission have not been ‘tested’ in a court, but witnesses testified under oath and provided insights from people who would be extremely difficult to access for an interview. Documentary analysis triangulated interview findings and mitigated the impact of gaps in interview and transcript data.

Analysing the characteristics of narratives around transformation facilitates an examination of local pressures and how different actors are responding to these pressures. Understanding these dynamics can contribute new insights into how energy transitions progress (or stall) by going beyond the power dynamics that are directly linked to energy projects. Instead, this framework provides a lens to explore the nexus between the energy sector and the broader political settlement, and how this might inform responses to international pressure to decarbonise energy sectors.

5. Alternative approaches to transformation in the MEC

After coming to power in 1994 the ANC began embedding its goal of ‘transforming’ South Africa into national policy. The ANC framed transformation as a nation-building activity in its 1994 election manifesto and codified the party’s 1994 White Paper on Reconstruction and Development as ‘the policy instrument that will direct the progress of the transformation strategy’, shortly after coming to office (Government of South Africa 1994, African National Congress 1994). The 1996 Constitution also sets out the requirement that SOEs work to ‘redress the imbalances of the past to achieve broad representation’, setting out a legal justification for allocating rents to facilitate transformation. Prior to the transition from apartheid, rents from Eskom included jobs for poor white workers, maintaining the racial hierarchy of the company’s workforce and extending access to the grid to rural farming communities in the 1950s and 60s (Eskom 1969, Clark 1994, Truth and Reconciliation Commission 1998). Eskom was then one of the first SOEs to start training black managers in the 1980s and from the 1990s onwards embarked on an extensive electrification programme to increase access to the grid for black communities (Eberhard and Van Horen 1995). This distribution of rents from Eskom to targeted demographics speaks to SOEs social mandate that the Constitution outlines. Interviewees reaffirmed this social role of Eskom and other SOEs; describing SOEs as ‘commercially-minded public enterprises’,⁵ while a former Eskom executive stated, ‘I also want to contribute to the upliftment of my people, this is why I work in the [SOEs]’.⁶ This idea of a ‘commercially-minded public enterprise’, underpins the developmental nature of narratives around transformation at Eskom and the need

to define transactions as ‘transformative’. For instance, procurement of goods from black-owned businesses is one indicator of SOEs’ commitment to ‘transformation’.

The new government used public procurement regulations to incentivise this form of transformation, although early BEE deals were largely voluntary as white-owned companies sought empowerment partners to gain political capital (Bowman 2019, von Holdt 2019). Interviewees described early BEE policy as relatively informal, with one interviewee arguing that, ‘before [the 2003 act] if it looked like BEE and sounded like BEE, it was BEE’.⁷ Another interviewee described mining companies as asking:

‘How do I get black empowerment in there when people have no balance sheets?’ What you started to see was a series of BEE transactions where people were essentially given free carries.⁸

The practice of giving people ‘free carries’, where people were awarded shares on the understanding that they would use future profits to pay for them, shows how these transactions enabled aspirant black elites to access the market despite having limited capital. An interviewee from the financial sector reiterated this point, noting that BEE-owned coal mining projects would be funded based on a letter of intent of Eskom’s intent to purchase coal from these suppliers.⁹ That businesses were willing to shoulder the financial risk of bringing on new partners suggests these transactions were most feasible when the economy was performing well, and when lucrative and accessible sectors for BEE – like mining – were profitable.

This dependence on market conditions for BEE deals has made it harder to access similar deals since the 2008 financial crisis (Bowman 2019). The interviewee from the financial sector indicated that banks had become less willing to fund coal mining projects following the financial crisis and backlash against coal-generated electricity.¹⁰ Although accessing these rents has become more difficult, Eskom still needs coal and the supply agreements with mining houses and trucking companies to deliver the coal have fuelled resistance to reducing coal-generated electricity. To justify ongoing access to these contracts, prospective rent-seekers have called for a hard-line approach to achieve RET and tackle ‘white monopoly capital’ that is advocating for reform or limiting financial resources. Importantly, proponents of RET have also used these narratives to manipulate processes at Eskom to suit their faction.

Interviews with former Eskom employees indicated that they frequently faced accusations of being ‘anti-transformation’ if they questioned an instruction from superiors.¹¹ Such accusations carried personal and professional impacts, making it difficult to gain employment elsewhere. In addition to also pointing to a selfishness as they would not ‘advocate for black advancement’ once they were ‘comfortable’.¹² These accounts highlight the

disciplinary aspect of narratives around transformation, and how political factions could use these narratives to erode employees' capacity (or willingness) to respond proactively to crises if it undermines their job security.

Allegations that black managers and executives 'did not support the transformation agenda'¹³ also highlight instances of how the creation of a black politically connected capitalist class and political factionalism have shaped narratives around transformation. Zuma's faction of the ANC became dominant immediately before the financial crisis triggered an economic downturn from which the country has not recovered.¹⁴ According to one interviewee, the economic downturn limited the potential for the BEE transactions that took place before the transition, closing one avenue for accruing capital. The interviewee indicated that without the ready cooperation of corporations to enter into agreements with the new political elite, SOEs became even more important sources of rents.¹⁵ Eskom remains the biggest purchaser of coal by volume in the country, maintaining demand for BEE-compliant suppliers (Minerals Council South Africa 2021).

The ANC's alliance with the Congress of South African Trade Unions (COSATU) adds another dimension to this political economy through union members. Labour unions are powerful actors in the mining and energy sectors and are vocal critics of proposals to reform Eskom, including increasing procurement of renewable energy (Cock 2019). There is also a sense that mining continues to form the basis of the economy; communities around mines depend on the industry directly for jobs, but also indirectly through income from providing services to mine workers (Cock 2019). Several interviewees emphasised the importance of the mining sector. One interviewee from the Minerals Council stated, 'if we don't have a mining sector we don't have a country'.¹⁶ Meanwhile, others indicated that it was premature to think that coal mining would become less important in the medium term.¹⁷ Interviewees' certainty that mining and electricity generation from non-renewable sources will be a constant fixture in the country demonstrates the extent to which proponents of the MEC understand the complex as a fundamental part of the country's political economy.

6. Contesting a 'just' energy transition

Narratives around transformation in South Africa's energy sector have recently expanded to include rhetoric around a 'just energy transition'. Policy makers' recognition of the need to move away from coal-generated electricity is not new in South Africa; the 1998 White Paper on Energy Policy recommended the addition of renewable energy sources to the energy mix to improve sustainability and accessibility; the 2011 New Economic Growth Plan includes a 'green economy' as a 'pillar of future'; and the 2012 National Development Plan calls for the

diversification of the energy mix and reduction of carbon emissions (Government of South Africa 1998, 2012, Swilling 2012). The first round of the Renewable Energy Independent Power Producers Procurement Programme¹⁸ (REIPPPP) took place in 2011, although the push towards nuclear energy during Zuma's presidency temporarily derailed the programme (Baker and Phillips 2018, Hochstetler 2020). International agreements such as the JETP have also pledged millions of dollars towards decarbonising the electricity system. The widespread articulation of the desire to achieve a 'just transition' reflects the extent that this has become a normative ambition. Although it is unclear how this will be achieved.

This international push for a 'just transition' has reduced the availability of financing for coal projects in South Africa. Even before the COP26 agreement, an interviewee from the financial sector noted that coal-generated electricity and coal mining more broadly, 'just aren't very popular right now' and that there was a lot of pressure on the banks to limit funding for coal projects. They also noted that it was unfair that the 'West developed on coal' but was now demanding that South Africa buy technology from Western countries to expand renewable energy.¹⁹

The interviewee's comment highlights resentment in South Africa towards the international community over the push to switch to renewables, despite the country having substantial coal reserves. Another interviewee referred to European pressure to diversify energy sources while diversification is dependent on purchasing European technology as a form of colonialism.²⁰ This resentment has influenced the emergence of a pro-MEC and pro-coal lobby in South Africa that – like the RET faction – draws on the nationalist dimensions of narratives of transformation. Although some interviewees identified with the ideals embedded in RET, I also spoke with several 'pro-MEC' participants who do not identify with the vision RET outlines.²¹ Similarly, politicians who have been at the centre of the energy debate, such as Gwede Mantashe, as Minister for Mineral Resources and Energy and Pravin Gordhan, as the former Minister for Public Enterprises, are not members of the RET faction.

The RET faction's use of nationalist narratives of transformation has contributed to a racialisation of the 'just transition' debate. These narratives depict renewable energy sources as 'white and foreign', while coal and nuclear energy are local and black-owned. An NUM official reportedly declared that a just transition was a 'northern notion' while 'coal is a part of African culture', underling the polarisation of these debates in some cases (quoted in Cock 2019). During a public debate in March 2020 Adil Nchabeleng, an energy commentator who is opposed to renewable energy projects and is associated with Zuma's new political party, argued that renewables failed to deliver tangible benefits to South Africa. Claiming that

Table 1. Analysis of ownership structures of renewable energy projects (from Müller and Claar 2021).

Project type	Description	No. of projects
Transnational renewable energy investment	A 'complex shareholder consortia, involving multiple international partners, and an exceptionally high share of inter- and transnational capital, ranging between 40% and (mostly) 60%, with private equity playing an important role. This is complemented by a lower share of local capital and low involvement of local communities.'	31
Transnational social entrepreneurship	A 'high share of transnational investors, complemented by an almost equally high share of community trusts, ranging between 10% and 40% of community ownership'.	26
Locally owned	Projects 'involving smaller, South Africa-based project developers or joint ventures ... engineering and construction work is performed by domestic companies ... The shareholder amount of community trusts is higher than the 2.5% required by REIPPPP directives, ranging between 15% and 40%...projects are more likely to be financed through debt from developmental banks than through equity'.	25

a company brought in a 'village' of Spanish people and was 'taking money out of South Africa' at the expense of '3-4% economic growth (2020).

This rhetoric taps into parallel themes of the broader campaign around parasitic 'white monopoly capital' and concern over white ownership of the economy. Foreign capital does play a significant role in the REIPPPP and is one source of criticism (see Table 1).

As the state has thus far not invested in major renewable energy generation projects, it appears that the REIPPPP as a route towards a 'just transition' relies on private-sector driven economic transformation. Imagining a 'just transition' within a pro-market framework limits the radical potential of a future without coal and discourages citizens who find that it offers few opportunities for non-elites. Research in coal mining areas in Mpumalanga and Kwa-Zulu Natal speaks to these risks. According to Cock, 'the notion of a just transition was found to be largely declarative, lacking substantive content, unrelated to everyday lived experience and failing to provide any compelling alternative vision of a world beyond coal' (2019). The lack of a clear sense of what a 'just' transition entails (beyond reduced use of coal generated electricity), is a critical weakness in the renewable energy movement in South Africa, which proponents of the MEC can exploit.

Meanwhile, Barnes has found that people living in mining affected communities 'mainly want autonomy' from the energy transition (2022). Anti-renewables discourses tap into this desire for 'autonomy', framing the risk of losing access to – and control over – electricity as a consequence of foreign ownership of renewable electricity projects. The REIPPPP does move beyond the elite accumulation of early BEE policies by including community trusts

and locally owned projects (see Table 1 and Müller and Claar 2021). However, the programme still represents a shift towards non-state actors – and international finance in particular – in leading energy sector reform. The parties that win renewable energy projects promise jobs, affordable electricity, less polluted environments, and a healthier population. Framing these advantages as a benefit of community stakes in these projects places the private sector as the leader of transformation, de-emphasising the role of government allocated rents.

However, privatising energy generation is contentious. Interviewees underlined the political baggage of privatisation policies in South Africa, calling it a ‘swear word’ or stating that ‘it’s like heresy’.²² Government proposals to ‘unbundle’ Eskom by separating generation and transmission operations into separate entities reflect this reluctance to avoid explicitly supporting privatising some divisions of the company. Similarly, interviewees stated that they refused to directly refer to privatisation when talking with government, ‘to avoid causing offence’. Interviewees noted how they drew on language related to transformation to make independent power producers (IPPs) more palatable by misrepresenting some financial institutions as examples of ‘public participation’. For instance,

I talk about it in terms of public participation because people who buy power plants are not private capitalists, they’re usually pension funds and institutional investors.²³

These interviewees are actively engaged with shaping government energy policy but have not necessarily been political insiders to the same extent as beneficiaries of BEE within the MEC. They are consequently drawing on familiar narratives to justify access to this sector. The emphasis on ‘public participation’ also represents an attempt to personalise financial transactions. These comments demonstrate a conscious effort to engage with narratives around transformation to defend the energy transition through the introduction of private generators.

Although interviewees viewed the racialisation of the ‘just transition’ debate as an impediment to reform, they tended to view a lack of political will as a bigger barrier. For instance, one long-time advisor on government energy task teams noted that the factors that blocked the REIPPPP during Zuma’s presidency were still ‘playing out’.²⁴ For instance, Zuma’s government delayed REIPPPP bidding rounds and instead pursued an opaque nuclear energy deal that was eventually halted in the courts (Kachur *et al.* 2021). The interviewee raised the role of ‘traditional interest groups’ within the MEC seeking to protect their ‘sphere of influence’ as a particularly strong force in blocking energy sector reforms. Another interviewee, a renewable energy representative at forums such as NEDLAC and BUSA, reiterated the role of the ‘parasitic’ ‘massive coal economy’ as an impediment to an energy

transition.²⁵ They argued that the political economy of the energy sector had embedded interests in the MEC to the extent that reforming the energy sector meant challenging the fundamental political economy of the country:

I don't think that there is any other country in the world that gets the kind of vitriol that the renewable energy sector gets in SA because it is disrupting the current political structure, in terms of - you might even say - how does the ANC fund itself and how do individual people fund themselves.²⁶

Another interviewee, an energy sector consultant, was more sympathetic, noting that the minister of energy had released a 'pro-renewables' Integrated Resource Plan (IRP)²⁷ but that political imperatives made it difficult to commit to this agenda:

So obviously there is a very strong coal lobby ... and a nuclear lobby (I don't take them too seriously) ... and they do seem to have the ear of the minister. But if you read carefully what the minister says he's never very direct or clear, and I think that's deliberate ... He once told me in an interview that he never puts anything to writing.²⁸

Referring to the political networks that have reinforced the position of the MEC in post-apartheid South Africa, they said, 'labour is part of the coal lobby, and the minister comes from the coal mining industry or shall we say the mining industry and so he is looked to, to be their man and to be fighting for coal'.

Unions' desire to avoid retrenchments²⁹ through closing power stations, or 'unbundling' Eskom points to the impact that an energy transition could have on communities surrounding mines and power stations. While communities around mines and power stations may be the worst affected by pollution, they also stand to lose their livelihoods (Presidential Climate Commission 2022). Tensions over job losses and community dependence on mines forge links between party leaders and union leaders, union leaders and workers, and communities to mines. These networks are embedded in and reinforce the MEC.

According to the renewable energy sector representative, the MEC is so embedded in the political economy of the country that reforms had to come from outside the sector, specifically from the department of environment.³⁰ Moreover, the interviewee also felt that REIPPPP eliminated rent-seeking opportunities because it had been developed 'in isolation' from the department of energy, with the national treasury and external consultants. They argued that

The problem [for rent-seekers] with REIPPPP is that it is so efficient that it is almost impossible to employ the economic rent model because when an IPP has to essentially put their price together, he can't just suddenly add a - R500 million backhander to someone because you won't win ... So what do they do? They delay it.³¹

Following his resignation as Eskom CEO in November 2022, André de Ruyter reportedly stated that ‘the one good thing about the sun and the wind is that it cannot be stolen. It also cannot be exported to China, [processed] there, and then be sold back to us’ (2022). This statement taps into the serious issues around corruption and coal procurement at Eskom, as well as challenging the assumption that coal-generated electricity reduces dependence on foreign powers. The sentiment that the renewable procurement programme is too efficient to create rents is optimistic. It is also rooted in some actors’ belief that competitive markets are more transparent and better for economic development, directly contradicting the approach set out by the RET and pro-MEC factions.

The South African government under Ramaphosa has been willing to engage with these issues. The Eskom Roadmap, the 2019 IRP, the ANC’s 2020 Reconstruction, Growth and Transformation discussion document, and the 2022 launch of the Just Transition Framework address the need to reform Eskom and reduce the country’s dependence on coal. However, progress in implementing these plans has stalled, and some interviewees, including an advisor on government energy taskforces, felt that it was unlikely that the government would meet the targets outlined in these documents. De Ruyter’s resignation as CEO in November 2022 following rumours that he lacked political support to undertake reforms at Eskom (and an attempted poisoning), underlines the difficulty in disrupting this political economy.

7. Analysis: politicising the energy transition

Beyond acknowledging that the political economy of the MEC is a barrier to an energy transition in South Africa, it is important to outline how it has gained and sustains its influence. Post-apartheid development policy and narratives around transformation influence rent-seeking practices. However, how to achieve transformation is an unresolved debate, enabling different actors to draw on the nationalist and developmental characteristics of transformation narratives to justify access to resources or advocate for a particular policy. One dimension of this debate is whether transformation should be private sector or state-led. For the energy sector, reducing Eskom’s monopoly over electricity generation will also reduce the number of coal supply and coal transport contracts, which have proven to be a lucrative and relatively consistent rent for aspirant black business elites since the mid-1990s.

The opportunities for black suppliers in the coal value chain contrast with renewable energy technologies, which are imported from Europe and – following the COP26 agreement – publicly backed by western finance. This has contributed to a racialisation of the energy transition debate where the

MEC is framed as ‘pro-black’ in comparison to ‘neo-colonial’ renewable energy projects. The political faction around former president Zuma is particularly vocal in its resistance to increasing the share of renewable energy in the energy mix. Yet the interviews with people who are not associated with this faction show a reluctance to look beyond the MEC for South Africa’s energy future.

The interview data also shows that proponents of renewable energy have consciously tried to draw on the developmental dimensions of transformation narratives to advocate for a ‘just’ energy transition. However, the role of international finance in the renewable energy sector is a particularly challenging obstacle, given associations with ‘white monopoly capital’ and apartheid’s legacy of racial inequality.

8. Conclusion

This paper contextualises political barriers to change in South Africa’s energy transition through interviews with experts who participate in national energy policy forums and those who are directly involved with rent-seeking processes at Eskom. Interviewing key informants within the MEC and others who are working to reform it demonstrates how South Africa’s energy transition is inextricably connected to unresolved questions over how to approach socio-economic development as a means by which to tackle apartheid’s legacy of racial inequality. Resistance to private sector led, and western funded, energy interventions will likely persist without meaningful restorative and redistributive justice measures that address apartheid’s legacy, which independent power producers currently appear unable to provide.

Further research is needed to understand how wide the support base is for the different elite groupings outlined in this paper and the social barriers or enablers of an energy transition. This includes how communities surrounding coal mines and power stations view and understand the proposed energy transition. Examining trade union representatives and members’ perspectives is another critical line of inquiry. Addressing these two gaps will provide vital insights into how the people who are among the most affected by coal and a prospective energy transition are engaging with these debates.

As well as contributing to South Africa-specific scholarship, the paper also adds to studies which address energy transitions in the post-colonial context. For instance, transformation narratives have reinforced the value of the MEC as a source of rents for development. This has parallels to Ecuador, where Ickler has noted the ‘seductive’ power of maintaining access to rents in a particular sector and how this might hinder an energy transition (Ickler 2023). It is therefore beneficial to understand how pressure to reform from international actors will interact with national development policy and rhetoric. The South Africa case also shows how an energy transition that is

backed by western financiers is especially contentious in a country with a legacy of colonial extraction. Western donors and financiers back renewable energy technologies as the ‘cost-competitive’ option further embedding ‘green neoliberalism’ in the transition (Newell and Phillips 2016). Foreign ownership of these technologies and the risk of further indebtedness to Western agencies through loans to finance an energy transition are strongly resisted in South Africa and is an easy criticism for opponents of renewable energy projects. In the absence of a meaningful response to these critiques, while there is still the possibility of rents linked to coal-generated electricity, political resistance to an energy transition is likely to persist.

Notes

1. According to (Eskom’s 2021) Integrated Report its debt stood at ZAR401.8 billion (approximately US\$25.1 billion)(Eskom 2021).
2. In South Africa, ‘state capture’ broadly refers to the privileged access to contracts and decisions at state-owned enterprises that some actors gained during Jacob Zuma’s presidency.
3. I do not assume that the outcome of rent-seeking is always negative, as the targeted allocation of rents (such as coal contracts, access to electricity, and jobs) can be used to develop industries or support specific demographics (see Khan, 2000). For an overview of the rents that Eskom holds and how they have been distributed see [chapter in PhD thesis, reference to be added after review, see Bookbinder, 2021].
4. The commission’s full title is the Judicial Commission of Inquiry into State Capture, Corruption and Fraud in the Public Sector Including Organs of State.
5. Interview with a lawyer specialising in public procurement. November 2018.
6. Interview, November 2018.
7. Interviewee who had previously run a BEE coal mining company (Online interview, May 2020).
8. Interview with a renewable energy representative at the consultative forum, National Economic Development and Labour Council (NEDLAC), and government advisor for energy policy including the Integrated Resource Plan (IRP) and 2019 Eskom Roadmap, May 2020.
9. Interview, January 2019.
10. Interview, January 2019.
11. Interview with former Eskom executive, November 2018; Interview with former manager in the Primary Energy Division, December 2018; Interview with former manager in the Primary Energy Division, January 2019.
12. Interview with former Eskom executive, November 2018.
13. Interview with former Eskom executive, November 2018.
14. GDP growth has been an average of 1.5% per year since 2008 (World Bank 2020).
15. Online interview with a representative of the renewables energy sector at NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.
16. In person interview with representatives from the Minerals Council, the main body that represents mining companies in South Africa, November 2018.

17. In person interview with manger in Eskom's Primary Energy Division, January 2019; in person interview with former manager in Eskom's Primary Energy Division, January 2019; in person interview with geoscientist specialising in coal-generated electricity, April 2019.
18. The public scheme for companies to bid for renewable energy projects, as of 2024 it is in its 7th round.
19. Interview, January 2019.
20. Interview with a former manager in Eskom's Primary Energy Division, January 2019.
21. Participants who were pro-MEC but not part of the RET faction include representatives from the Minerals Council (interviews, November 2018), two geologists who work in coal-generated electricity (interviews, December 2018 and April 2019), and representatives from the Afrikaans Union, Solidarity (interviews, February 2019).
22. Interview with a former ANC minister, March 2019; interview with a representative of the renewables energy sector at the NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.
23. Interview with an energy consultant, May 2020.
24. Interview, June 2020.
25. Interview with a representative of the renewables energy sector at NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.
26. Interview with a representative of the renewables energy sector at the NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.
27. The national 'electricity infrastructure development plan', which is updated semi-regularly.
28. Interview with energy consultant, May 2020.
29. In person interview with Eskom representatives from Solidarity, February 2019; in person interview with energy representative from NUM, March 2020.
30. Online interview with a representative of the renewables energy sector at NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.
31. Online interview with a representative of the renewables energy sector at NEDLAC, and consultant on the IRP and 2019 Eskom Roadmap, May 2020.

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ORCID

Ruth Bookbinder  <http://orcid.org/0000-0002-5154-605X>

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