



electricity & energy

Department:
Electricity and Energy
REPUBLIC OF SOUTH AFRICA



SAREM PRIORITIES AND APPROACH TO ADVANCING GREEN INDUSTRIALISATION



22 September 2026

Presenter: Ms Nomawethu Qase



PRESENTATION OUTLINE

1. SAREM Overview

2. Implementation Plan Priorities

3. Task Team Establishment

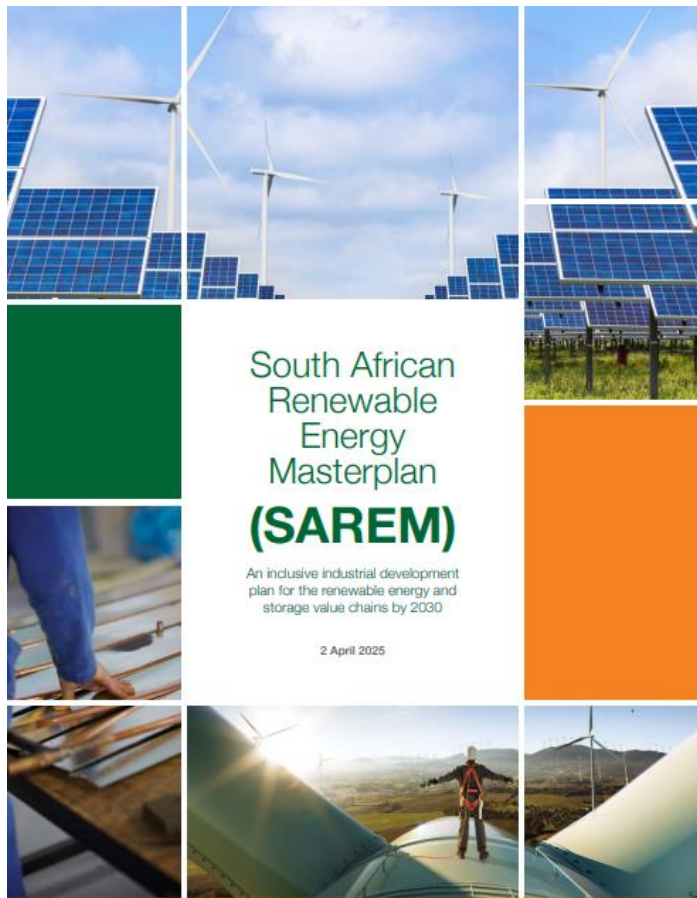
4. Manufacturers Database

5. Call to Action





VISION, KEY OBJECTIVES AND PILLARS



South African Renewable Energy Masterplan (SAREM)

An inclusive industrial development
plan for the renewable energy and
storage value chains by 2030

2 April 2025

Vision

Industrialisation of the renewable energy and battery storage value chain to enable inclusive participation in the energy transition, serving the needs of society, and contributing to economic revival

Key objectives by 2030:

- Grow the economy by fostering the rollout of renewable energy and battery storage projects
- Grow the industrial capacity in the renewable energy and battery storage value chain
- Create and sustain decent employment across the value chain
- Build the capabilities needed for the industry's sustained growth
- Build a transformed industry throughout the value chain
- Contribute to a just transition

Supporting demand

- Market certainty
- System readiness

Driving industrial development

- Localisation
- Input materials
- Trade promotion

Fostering inclusive development

- Transformation
- New entrants
- Just transition

Building the capabilities

- Skills and
technology
development



SAREM PLEDGE: A SHARED COMMITMENT TO WORK TOGETHER

- ❖ As a social compact, SAREM represents more than the collection of individual actions toward **economic development and industrialisation**.
- ❖ It is the collective commitment to work together to grow the **renewable energy sector, deliver decent jobs, skills, investment, transformation and localisation** - while meeting our country's priorities in **energy, climate, and just transition**.
- ❖ This letter signals shared confidence in the vision and direction of SAREM and a shared commitment to playing an active role in its delivery.

SOUTH AFRICAN RENEWABLE ENERGY MASTER PLAN PLEDGE

We, the undersigned, are members of the executive oversight committee representatives of the constituencies supporting the South African Renewable Energy Masterplan (SAREM) social compact; government, industry, labour, and community. We wish to express our support for the launch and implementation of the South African Renewable Energy Masterplan.

We acknowledge that SAREM is a product of extensive consultation and collaboration across sectors and is rooted in the shared vision to achieve a well-developed renewable energy and storage value chain that enables a transformed industry and inclusive industrialisation.

As a social compact, SAREM represents more than the collection of individual actions toward economic development and industrialisation. It is the collective commitment to work together to grow the renewable energy sector, deliver decent jobs, skills, investment, transformation and localisation - while meeting our country's priorities in energy, climate, and just transition.

We recognise the importance of coordinated commitments and action. Individually and collectively, we are committed to supporting the implementation of SAREM through joint planning, engagement, and practical cooperation. We also affirm our commitment to keep our constituencies informed and mobilised to contribute meaningfully to this work and the realisation of its objectives.

This letter signifies shared confidence in the vision and direction of SAREM and our commitment to playing an active role in its delivery.

Signature _____
Name _____
On behalf of Government: DEE

Signature _____
Name _____
On behalf of Government: DSTI

Signature _____
Name _____
On behalf of Business/Industry: SAWEA

Signature _____
Name _____
On behalf of Business/Industry: SAESA

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Name _____
On behalf of Business/Industry: NBI

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On behalf of Business/Industry: EIUIG

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On behalf of Labour: COSATU

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On behalf of Community

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On behalf of Government: the dtic

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On behalf of Government: DSBD

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On behalf of Business/Industry: Manufacturing Circle

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On behalf of Business/Industry: SAPVIA

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On behalf of Business/Industry: BEPA

Signature _____
Name _____
On behalf of Business/Industry: Minerals Council

Signature _____
Name _____
On behalf of Labour: FEDUSA

Signature _____
Name _____
On behalf of Community

29 September 2025
Centurion, Pretoria



SAREM IN A SLIDE – CATALYTIC INTERVENTIONS

Market demand

Clarify the market

- Pipeline of both public and private demand

Address cross-cutting issues hindering demand

- Physical & market infrastructure
- Energy One Stop Shop

Support demand from other segments

- Energy security in industrial parks
- Energy Resilience Scheme
- Concessional financing mechanisms for industrial, commercial and farming operations
- RE rollout programmes for all suitable public structures and un- or under-served communities
- Pilot programmes for low-income household rollout and community-led ownership models

Support demand from power-to-x markets

Industrial development

Establish clear localisation objectives

- Evidence-based 'ramping curve'
- Research on available capacity

Align industrial policy and programmes with localisation

- Re-activate the 12i tax incentive for RE/BESS
- Align existing public sector programmes and policy support with SAREM
- Value proposition to attract investment in industrial parks
- Testing/certification facilities and mandatory standards for key products
- Consumer education and localisation drive campaigns

Harness trade policy

- Import duty exemption or protection on strategic inputs
- Implement CCA and zero-rated VAT / duties
- Database of African RE projects
- Bilateral arrangements and trade promotion
- Regional collaboration strategy (SADC, BRICS, AU)

Build industrial linkages & circularity

- Align with other industrial development plans (steel, autos, batteries, Tx/Dx)
- Analysis of the potential to achieve circularity and build an end-of-life industry
- Solar PV rollout programme for schools/clinics/etc. based on panels replaced by large projects

Establish clear transformation objectives

- B-BBEE sector specific scorecard
- Increased inclusion of women, youth and persons with disabilities

Foster integration of emerging suppliers

- Transformation Fund to support new entrants
- the dtic's Strategic Partnership Programme

Direct activities to JT hotspots

- Launch public procurement rounds for JT hotspots
- Strengthen industrial park(s) in hotspot areas (in alignment with REDZs)

Drive an inclusive value chain

- Decent work framework linked to public procurement and state support
- Gender inclusivity action plan
- Clear guidelines and best practice for ESOPs + pilot programmes

Capabilities

Map and build skills

- Match-making 'PowerUp' platform
- Continual mapping
- Standardised trainings & qualifications
- PSET infrastructure capacitation programme

Activate skills

- Yes4Youth & other programmes
- Recognition of Prior Learning

Foster technology upgrading & commercialisation

- Match-making platforms between innovators & users + de-risking of trials
- Collaborative platform to review new technologies
- Incubation push
- Manufacturing Technology Centre + Solar Research Facility
- OEM-led cluster platform



- ❖ Mega scale renewable energy and infrastructure investments.
- ❖ Large scale local procurement expenditure.
- ❖ Technology transfer and development of local capacity and capabilities.
- ❖ Massive employment opportunities along value chains.
- ❖ Inclusive participation on industrialisation.
- ❖ Significant contribution to SA's energy security and JET imperatives.

Inclusive development

ANTICIPATED ECONOMIC BENEFITS





PRIORITY IMPLEMENTATION CLUSTERS

10 Priority Clusters

- Cluster 1 anchors delivery
- Cluster 2–3 sets the demand context that Cluster 4–7 acts on
- Cluster 8–10 ensures the transition is inclusive and sustainable.

OVERARCHING STRUCTURE

1. Setting up the PMO

DEMAND LANDSCAPE

2. Clarifying demand

3. Establishing localisation priorities

TRADE & INDUSTRIAL POLICY

4. Determining supply
side approach

5. Applying trade tools

6. Harnessing SEZs

7. Building the
industrial
ecosystem

INCLUSIVE DEVELOPMENT

8. Fostering transformation

9. Developing skills

10. Driving technology
development



IMPLEMENTATION TASK TEAMS

The PMO convenes multi-stakeholder Implementation Task Teams to drive, coordinate and accelerate the execution of SAREM, translating priorities into action across government, industry, labour and civil society.

Five Implementation Task Teams convened by the PMO

Manufacturing Opportunity Task Team

Update component-level understanding of what can be localised and inform the design of manufacturing demand levers, feeding into the designation process under the Procurement Act.

Trade and Industrial Policy Task Team

Inform ITAC processes, staged consignment reform, and supply-side interventions (12i and related instruments).

Industrial Spaces Task Team

Harness SEZs, IDZs and other industrial spaces by informing value propositions for industrial spaces to drive manufacturing supply and demand

What Task Teams do

- Translate SAREM priorities into implementation plans
- Agree on the most critical actions in light of market, policy and technology developments
- Align public and private sector initiatives to avoid duplication
- Propose solutions to regulatory, financial and technical barriers
- Catalyse investment, partnerships and institutional support
- Support the PMO in tracking delivery and flagging delays
- Offer expertise to refine interventions and align with global best practice

Additional Task Teams will be convened in the future in line with implementation progress



IMPLEMENTATION TASK TEAMS

The PMO convenes multi-stakeholder Implementation Task Teams to drive, coordinate and accelerate the execution of SAREM, translating priorities into action across government, industry, labour and civil society.

Inclusive Development

Drive transformation, skills development and employment outcomes in manufacturing, linking industrial opportunities to training and job creation.

Employee Share Ownership Plans

Broaden worker ownership by developing standard ESOP structures, funding models and governance guidance for firms across the value chain.

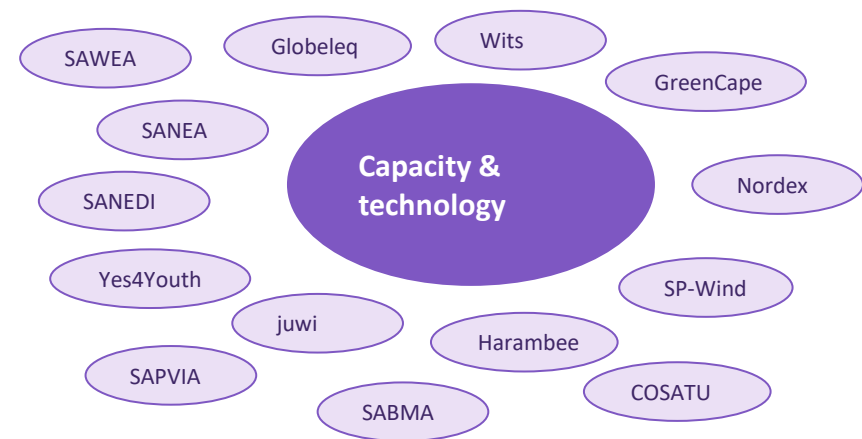
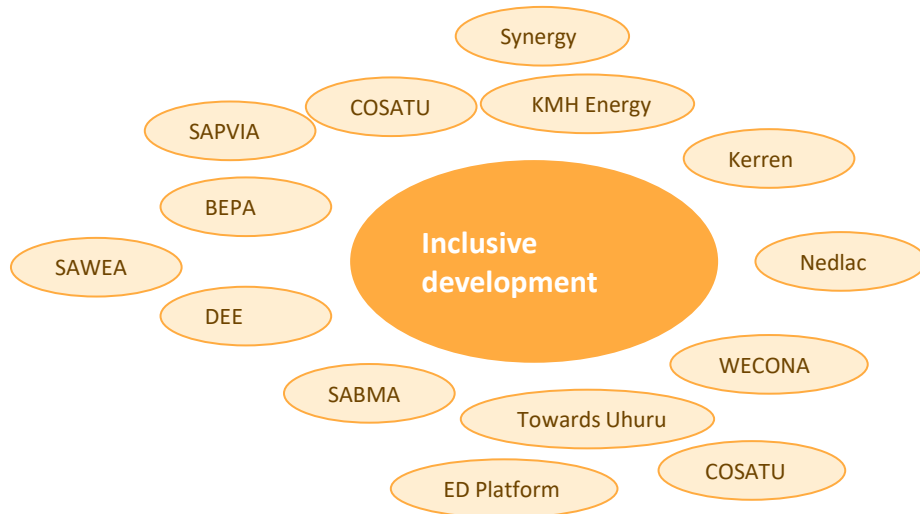
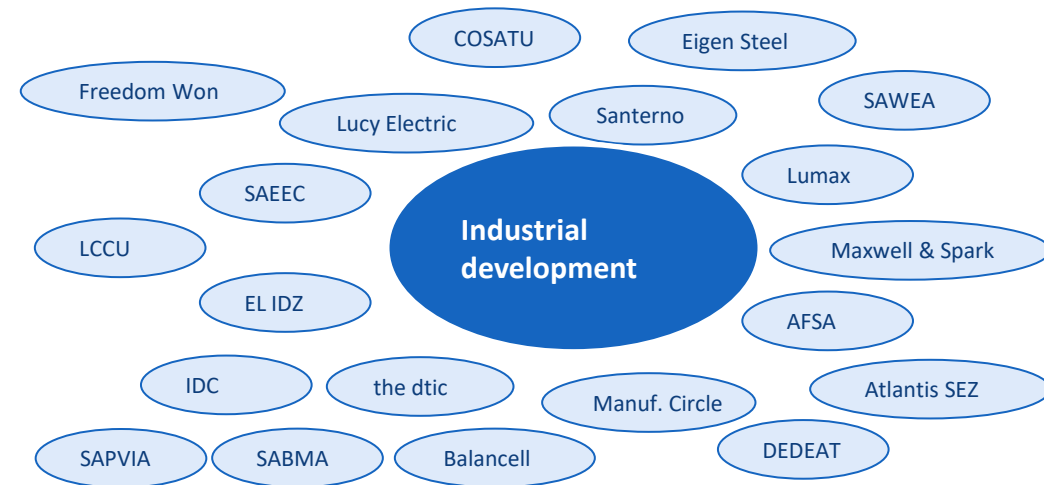
Task Team Composition

- ☐ Champions from public sector, industry, labour, civil society and technical experts.
- ☐ Priority given to institutions positioned to drive or materially influence implementation.
- ☐ Members serve in their individual capacity;
- ☐ Participation is voluntary and non-remunerated.



IMPLEMENTATION TASK TEAMS

Over 80 organisations positively responded to the invitation to contribute to Implementation Task Teams



SAREM Local Manufacturing Value Proposition



Implementation Plan Element: – align industrial policy and programmes with renewable energy and storage localisation (Catalytic intervention)

- SAREM has produced a value chain investment overview for South Africa’s renewable energy sector, highlighting localisation opportunities and manufacturing potential for wind, solar, and energy storage components.
- The pack identifies where local production can be competitive and informs both public and private investment decisions.

SAREM Target: Increased local competitiveness

	Solar	Wind	Energy Storage
Market Growth Projections (2024-2030)	~15.3 GW	~7.2 GW	~6.5GWh
Vertical Components	Wafer & Ingots Cells / Modules Mounting Structures Trackers Fasteners	Towers Nacelles Blades	Polysilicon Anodes / Cathodes Packs
Transversal Components	Inverters Transformers Cables Switchgear Fasteners		
Related Services	Testing Certification Skills Development End-of Life		

Competitiveness	Strengthen the competitiveness of local renewable energy and battery storage manufacturers	Trade balance for selected renewable energy and battery storage products (LIBs, solar panels, inverters, transformers)	Negative trade balance	Neutral or positive trade balance
Economic growth	Increase investment in the RE & BES manufacturing and associated services sectors	Value of cumulative investment in the renewable energy and battery energy storage key component manufacturing	R2.5 billion	R15 billion



SAREM LOCAL MANUFACTURING DATABASE 1/2

Implementation Plan Element: establish localization targets (Catalytic intervention)

A publicly available database mapping South Africa's **renewable energy manufacturing capabilities**, developed by GreenCape in support of the Department of Trade, Industry and Competition (**the dtic**) and the South African Renewable Energy Masterplan (SAREM).

Purpose:

- Support **local content sourcing** and industrial development
- Increase **visibility of local manufacturers** to investors and project developers
- Improve **supply chain transparency** across the renewable energy sector

What's included:

- Manufacturer profiles (capabilities, experience, B-BBEE status)
- Component-level mapping across key value chains
- Coverage of **Solar PV, Wind, and Battery Energy Storage Systems (BESS)**

How it is used:

- Identifies **local suppliers** for projects and procurement
- Supports localisation, investment promotion, and policy engagement
- Manufacturers can be listed and keep details up to date

Why it matters: Strengthens alignment between renewable energy deployment and South Africa's industrialisation and localisation objectives.





SAREM Local Manufacturing Database 2/2

Implementation Plan Element: - establish localisation targets (Catalytic intervention)

- Through SAREM, the local manufacturing database has been expanded to cover 50 renewable energy and transmission component categories across solar PV, wind, battery storage and transmission infrastructure. The database maps approximately 80 local manufacturers across these value chains.
- This resource supports project developers, investors, and industry stakeholders in aligning procurement programmes with local content criteria and future localisation targets.

SAREM Target: Value of cumulative investment in local manufacturing

Economic growth	Increase investment in the RE & BES manufacturing and associated services sectors	Value of cumulative investment in the renewable energy and battery energy storage key component manufacturing	R2.5 billion	R15 billion
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Renewable Energy Input Components			
Sector	Component	Sheet Reference	List of manufacturers for component
Solar PV	Cells	001 - SPV - Cells	Artsolar Setsolar Sinetech Energy Seraphim
	Aluminium frames	001 - SPV - Alum. Frames	Hulamin Ave struct Wispeco
	Super-substrate (glass)	001 - SPV - Super_sub	PFG (ProSun PV) Furman glass
	Backing sheet	001 - SPV - Backing_Sheet	
	Ethylene Vinyl Acetate (EVA) / POE*	001 - SPV - EVA	Sondor industries
	Copper wiring	001 - SPV - Copper_wiring	Alvern Aberdare cables Copper cables & connectors
	Junction Box	001 - SPV - Junc_Box	
	Magnetics	001 - SPV - Magnetics	Magnet Electrical Energy
	Transformers	001 - SPV - Transformers	ACTOM (Pty) Ltd Trafo Power Solutions Transfix Ipower
	Circuit boards	001 - SPV - Circuit Boards	ICAPE Trax Circuitboard Manufacturing
	Electronics	001 - SPV - Electronics	
	Enclosures	001 - SPV - Enclosures	
	Steel profiles	001 - SPV - Steel_profiles	Clotan Steel
	Aluminium profiles	001 - SPV - Alum_Profiles	Hulamin Wispeco aluminium
	Clamps	001 - SPV - Clamps	
	Nuts & bolts	001 - SPV - Nuts_Bolts	Impala bolts & nuts CBC fasteners
	Conductors	001 - SPV - Conductors	
	Insulations	001 - SPV - Insulations	
	Armour	001 - SPV - Armour	
	Wiring (External + Internal)	001 - SPV - Wiring (E+I)	Wasin Cable SA ACDC Dynamics
	Adhesives & Sealants	001 - SPV - Adhesives_sealants	Sika South Africa
	PV System Components (BOS)	001 - SPV - PV BOS	Herholdt's Group SegenSolar

[View the SAREM local manufacturing database](#)



CALL TO ACTION



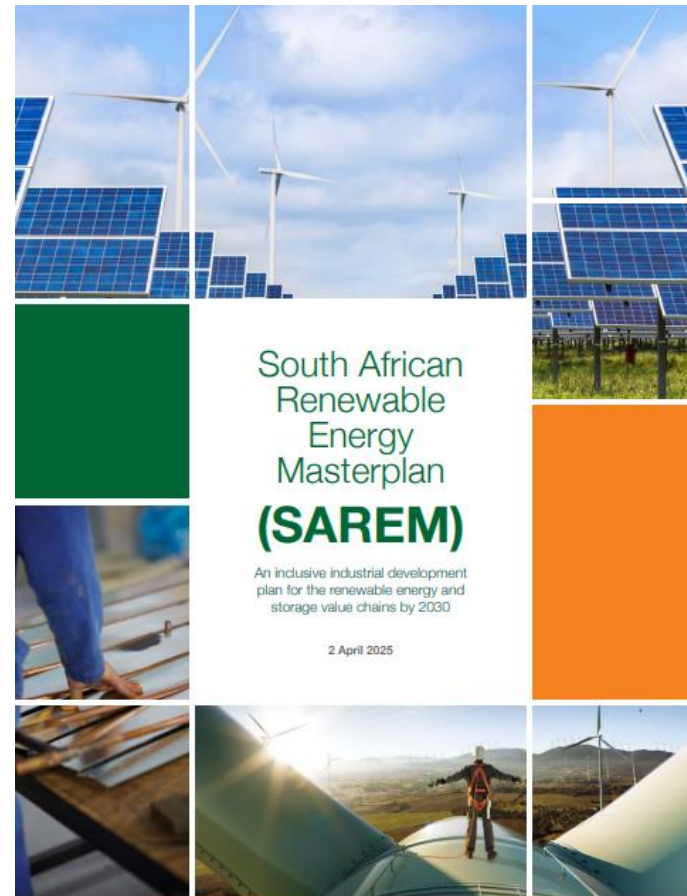
Please bring your expertise to the Task Teams



Manufacturers, please sign up on the database to be counted



There is a space for everyone – together lets supercharge SAREM!!!





THANK YOU