

As we bring 2022 to a close there are a number of positive signs on the horizon. Recent GDP figures and employment data show a turnaround in the economy and the rebound from the COVID-19 pandemic (see [TIPS REB Q3 2022](#)). Loadshedding, however, remains a persistent problem that holds us back. Clear signals have emerged from government that loadshedding is going to be around for the foreseeable future, with the space being opened up for own generation and a move towards renewable energy.

These developments have seen significant investments into renewable energy (see [REB Foreign Direct Investment Projects](#)) and many announcements made by energy intensive industries on their shift to large-scale and cleaner energy sources. Not only will these shifts result in significant investment into the economy, they extend the life and potentially improve the competitiveness of industries many thought were doomed due to high electricity prices, carbon emissions and trade measures (see TIPS research on climate change and trade).

TIPS continues to do an extensive amount of work on the Just Transition and the impact of climate change on the economy. This work has involved multiple working papers, policy briefs, dialogues and a recently launched Green Economy Bulletin.

Another important signal from government is the need for a turnaround of the state-owned companies (SoCs). These institutions are key for economic growth – from transporting goods, electricity provision and water treatment, to passenger rail. TIPS's work on the strategic use of localisation to support SoCs through effective supply chain development processes (forthcoming) highlights this role. This year has also seen measures invoked to protect state infrastructure by limiting the market for scrap metal, and strengthen the management and policing of the scrap metal value chain (see TIPS research on the scrap metal value chain).

TIPS continues with the quarterly bulletins and trackers, as well as updating the manufacturing subsector reports. These trackers and bulletins are all available on the TIPS website, and are part of our contribution to supporting evidence-based policymaking.

As in-person events increasingly return, we were able to hold a hybrid TIPS Forum this year and an in-person APORDE with several lectures and events held online or hybrid. We also held multiple online Development Dialogues. A blended format seems likely going forward. TIPS plans to bring back its training programme from 2023 and looks forward to seeing some of you back at our offices.

Saul Levin
Executive Director: TIPS

TIPS FORUM 2023

TIPS will host its Annual Forum 2023 on 1-2 August. The theme is Industrial Policy in an era of global structural change: Implications for Southern Africa. The call for papers will be released soon, available on the Forum website forum.tips.org.za



The TIPS Annual Forum 2022 on the theme of Towards a Just Transition: The Role of Industrial Policy was held in partnership with the South African Research Chair in Industrial Development (SARChI) based at the University of Johannesburg and the UK Partnering for Accelerated Climate Transitions (UK PACT), and in association with the Department of Trade, Industry and Competition.

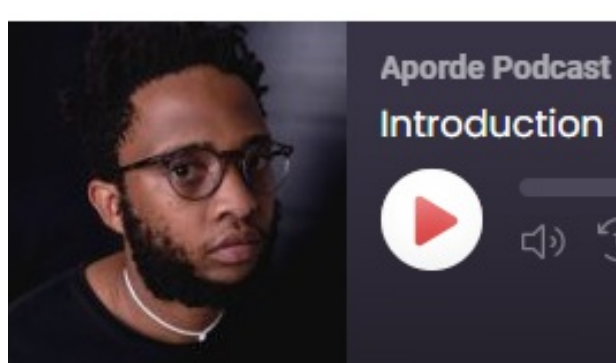
Copies of presentations and videos of the sessions are [available here](#)

APORDE

The African Programme on Rethinking Development Economics (APORDE) is a training initiative of the Department of Trade, Industry and Competition, with the support of TIPS.

This year's programme was held in person in September 2022. It included a number of public seminars. Videos and presentations from these as well as information about the programme are on it APORDE website www.aporde.co.za

APORDE PODCAST SERIES



The African Programme on Rethinking Development Economics (APORDE) has introduced a six-part podcast series, hosted by Ayabonga Cave. This draws on people who have participated directly in both the international and national APORDE network of development economists and social scientists.

Episode 1: Who Counts?
Episode 2: Understanding the role of conflict on the African continent from a political economy perspective, and
Episode 3: What options do African countries have in financing their investment in infrastructure?

[Podcasts available here](#)

THE REAL ECONOMY BULLETIN

The Real Economy Bulletin assesses trends and developments in the real economy and provides data and analysis on key manufacturing industries. Third Quarter 2022 is at [REB Q3 2022](#).

Briefing Notes in this edition:
[JETPs – just transition finance blueprints or business as usual?](#)
[Economic implications of the 2022 MTBPS](#)

Previous issues: [REB](#)

TIPS IMPORT TRACKER

The Import Tracker is a quarterly analysis of import trends, providing an overview of import patterns and a look at causes of surges in manufacturing imports and their likely impact on industry. Quarter 2 2022 is available at [Import Tracker](#).

For previous issues: [Import Tracker](#)

EXPORT TRACKER

The Export Tracker provides updates on export trends, and identifies sectors and products that are performing well and those that are lagging. Quarter 1 2022 is available at [Export Tracker](#).

Previous issues: [Export Tracker](#)

SELECTED MEDIA ARTICLES

[How to foster a truly just transition](#) – Daily Maverick 6 December by Peta Wolpe, Gaylor Montmasson-Clair, Muhammed Patel and Lauren Hermanus

[Busting the myriad electricity myths](#) – Business Day 26 September by Neva Makgetla (TIPS)

[No-one can be left behind](#) Green Economy Coalition Blog 8 August by Lerato Monaisa (TIPS)

[EU carbon tax move cranks up heat on SA exporters](#) Business Day 29 June by Gaylor Montmasson-Clair (TIPS) and Lerato Monaisa (TIPS)

For more articles: [TIPS in the News](#)

GREEN ECONOMY BULLETIN

TRENDS, DEVELOPMENTS AND DATA

NOVEMBER 2022

The new annual TIPS Green Economy Bulletin tracks and measures progress towards an inclusive green transition. It provides an overview, at the national level, of South Africa's progress in creating a more sustainable, inclusive and low-carbon economy. It aims to provide quick access to selected performance indicators that highlight key dimensions of the transition to an inclusive green economy. Available here: [Green Economy Bulletin 2022](#)

WATER AND SANITATION INDUSTRY MASTER PLAN

The development of the Master Plan is underway. A Research Report and a Policy Report, [available here](#), were produced as direct input into the process. Together they put forward a vision and the associated interventions, forming the foundation of a Water and Sanitation Industry Master Plan for South Africa.

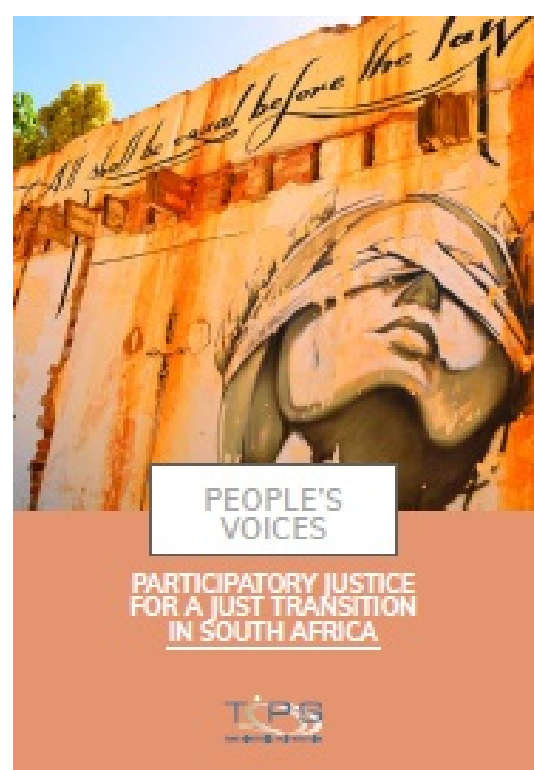
SCRAP METAL

[Report: Measures to prevent theft of scrap metal](#) – TIPS report for Department of Trade, Industry and Competition

[Policy Brief: Waste pickers and the proposed scrap-metal regulations](#) – Neva Makgetla (TIPS)

JUST TRANSITION

TIPS continues its work on a number of Just Transition projects. The following reports emerged from a joint initiative between TIPS, and the National Labour and Economic Development Institute (NALEDI), in collaboration with Peta Wolpe, and supported by groundWork, funded by the United Kingdom Partnering for Accelerated Climate Transitions (UK PACT). Just Urban Transitions (JUT) contributed to two of the reports. [Local government toolbox for a just energy transition in South Africa](#) – Lauren Hermanus (Adapt/JUT), Gaylor Montmasson-Clair (TIPS), Muhammed Patel (TIPS) and Peta Wolpe (Independent)
[Beyond coal: Opportunities to diversify the economies of Emalahleni and Steve Tshwete local municipalities](#) – Gaylor Montmasson-Clair (TIPS), Lauren Hermanus (Adapt/JUT), Muhammed Patel (TIPS) AND Peta Wolpe (Independent)
[People's Voices: Participatory justice for a just transition in South Africa](#) – Gaylor Montmasson-Clair (TIPS), Muhammed Patel (TIPS) and Peta Wolpe (Independent)



TIPS also collaborated with WWF South Africa on research on renewable energy value chains. This is part of a project aimed at "Making Sense of Employment in South Africa's Just Energy Transition", supported by GIZ. [Policy Brief: Employment metrics in South Africa's electricity value chains](#) – Lauren Hermanus (Adapt)
[Policy Brief: Petrol stations, workers and the just transition](#) – Nokwanda Maseko (TIPS)
[The state of research on renewable energy value chains in South Africa: Firms and employment characteristics](#) – Kate Rivett-Carnac (Independent)
[Insights into the Solar Photovoltaic manufacturing value chain in South Africa](#) – Kate Rivett-Carnac (Independent)
[Insights into the Wind Energy value chain in South Africa](#) – Kate Rivett-Carnac (Independent)



The Technological Change and Innovation System Observatory project aims to track and create awareness of disruptive innovation and discontinuous technological change by organisations in the public, private and not-for-profit sectors.

This includes profiling technologies at the frontier, such as:
Additive manufacturing: 3D and 4D printing
Information processing: Artificial intelligence, machine learning and big data
The Internet of Things

[Profiles available here](#)

RESEARCH REPORTS AND POLICY BRIEFS

[Research to support the future of a tagging system for just transition financial flows](#) – Sandy Lowitt (TIPS Research Fellow)

[Report: A South African perspective on climate change: From a just energy transition to climate resilient development](#) – Faizel Ismail (Professor and Director of the Nelson Mandela School of Public Governance, University of Cape Town and a TIPS Research Fellow)

[Report: Promoting intra-SADC trade through regional industrial value chains: A case study of import opportunities for South Africa](#) – Sandra Makumbirofa (TIPS)

Enhancing industrial resilience in South Africa - three papers by TIPS and GIZ for the Support to Industrial Parks and Special Economic Zones for the COVID pandemic prevention and response project:

[Responses of Industrial Parks to COVID-19 and future pandemics](#)
[Technical support to Industrial Parks on COVID-19 economic recovery plans](#)
[Industrial Park standard operating procedures for disaster risks reduction and response](#)

[Policy Brief: How the Artisan Recognition of Prior Learning model could redress the challenge of unqualified "plumbers"](#) – Lesego Moshikaro (TIPS)

UPCOMING TRAINING

For information about the TIPS training courses in 2023, contact Rozale Sewduth at rozale@tips.org.za.

TIPS is an independent, non-profit economic research institution established in 1996 to support economic policy development. TIPS undertakes quantitative and qualitative research, project management, dialogue facilitation, capacity building and knowledge sharing. Its areas of focus are industrial policy, trade and regional integration, sustainable growth, and a just transition to a sustainable inclusive economy.

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YEARS OF SUPPORTING POLICY DEVELOPMENT THROUGH RESEARCH AND DIALOGUE