



Integrated Resource Plan (IRP) 2025 Industry Position Paper

An Industry Assessment of Wind Energy Targets,
Delivery Constraints and the Pathway

Integrated Resource Plan (IRP) 2025 Industry Position Paper: An Industry Assessment of Wind Energy Targets, Delivery Constraints and the Pathway

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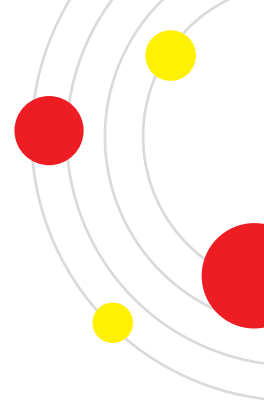


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Executive Summary

IRP 2025 provides South Africa with an important opportunity to accelerate wind energy deployment as part of a more secure, diversified and lower-carbon electricity system. The wind sector supports this ambition. The central implementation question, however, is whether the broader electricity system is ready to convert planned wind capacity into procured, permitted, financed, grid-connected and operational projects (Department of Electricity and Energy, 2025; International Energy Agency Wind TCP, 2023).

SAWEA's position is that South Africa's wind deployment challenge is no longer primarily a question of resource availability, technology maturity or developer appetite. The binding constraints are now at the system-level: transmission capacity, grid access certainty, procurement predictability, permitting efficiency, institutional coordination, market design readiness, storage and flexibility, supply chain capacity, localisation realism and skills availability (International Energy Agency, 2025).

The industry has demonstrated its ability to mobilise investment and deliver projects through the REIPPPP and an increasingly active private procurement market. More than 60 GW of wind projects are currently in development against an IRP 2025 wind target of approximately 43 GW, confirming investor interest and sector capability well ahead of near-term allocations. However, the pipeline alone does not guarantee delivery. Without grid availability, bankable procurement pathways, coordinated permitting and credible implementation timelines, megawatts allocated in the IRP risk remaining capacity on paper (Eberhard et al., 2014; Eberhard and Naude, 2016; South African Wind Energy Association, 2025).



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If implemented with discipline, IRP 2025 can unlock investment, construction activity, jobs, local industrial development, community benefits and reliable clean electricity at scale.

Industry engagement undertaken for this paper confirms that grid and transmission constraints are viewed as the most immediate and decisive barriers to wind deployment: 84.6% of survey respondents identified grid access as the primary bottleneck to deployment. Survey responses and focus group inputs also identify procurement uncertainty, fragmented permitting processes, policy and regulatory misalignment, supply chain limitations, localisation trade-offs and skills constraints as material risks to delivery. These barriers are interconnected and must be addressed as a system rather than as isolated workstreams (South African Wind Energy Association, 2025; Trade and Industrial Policy Strategies, 2022).

The industry therefore calls for an IRP 2025 wind implementation roadmap that aligns generation procurement, transmission expansion, grid connection processes, permitting timelines, market reform, storage and flexibility frameworks, financing mechanisms, industrial policy and skills development. This roadmap should include clear responsibilities, timelines, decision points and accountability mechanisms across government, regulators, NTCSA, Eskom, municipalities, financiers and the wind industry (Department of Electricity and Energy, 2025; National Business Initiative, 2025; Pinsent Masons, 2025).

If implemented with discipline, IRP 2025 can unlock investment, construction activity, jobs, local industrial development, community benefits and reliable clean electricity at scale. If implementation remains fragmented, the gap between policy ambition and actual deployment will widen, delaying the economic, energy security and decarbonisation benefits that wind energy can deliver for South Africa (Department of Electricity and Energy, 2025).

SAWEA Industry Position and Framing

This position paper sets out the wind industry's view on the practical conditions required to translate IRP 2025 wind capacity allocations into bankable, grid-connected and operational projects. It is intended to support coordinated industry engagement with government, regulators, NTCSA, Eskom, municipalities, financiers, developers, OEMs, EPC contractors, skills institutions and other ecosystem partners (Department of Electricity and Energy, 2025; South African Wind Energy Association, 2025).

The paper is framed around a simple industry proposition: IRP 2025 should not be treated only as a planning document. It must be supported by a coordinated implementation programme capable of aligning policy, procurement, grid, permitting, investment, market design and industrial capability (National Business Initiative, 2025; Cliffe Dekker Hofmeyr, 2025).

The wind sector's position is as follows:

1. Wind energy is central to South Africa's least-cost, reliable and decarbonised electricity future (Department of Electricity and Energy, 2025; International Energy Agency Wind TCP, 2023).
2. IRP 2025 wind allocations are achievable only if implementation constraints are addressed with urgency.
3. Transmission capacity and grid access certainty are the immediate binding constraints for new wind deployment (Eskom, 2023; International Energy Agency, 2025).
4. Procurement must become predictable across public procurement, private procurement and market-based channels.
5. Permitting must be coordinated, time-bound and adequately resourced across all relevant authorities.
6. Storage, flexibility, ancillary services, curtailment rules and market mechanisms must be treated as core enablers of wind deployment.
7. Localisation and industrialisation must be linked to stable demand, realistic cost pathways and domestic capability development (Trade and Industrial Policy Strategies, 2022).
8. Skills development requires sustained deployment volumes and a predictable project pipeline.
9. Successful IRP 2025 implementation requires a whole-of-system delivery compact rather than fragmented interventions.

The industry is ready to contribute to this compact. Developers, OEMs, EPC contractors, financiers, consultants and operators can support delivery through credible pipelines, responsible development, data sharing, skills development, local supplier development, meaningful community engagement and active participation in market reform. However, industry commitments will only translate into large-scale deployment if the enabling system is aligned.

Context: The IRP 2025 Wind Deployment Challenge

South Africa's electricity system is moving from a historically coal-dominated, vertically integrated model toward a more diversified and reform-oriented market. This transition is driven by energy security needs, ageing coal assets, decarbonisation commitments, private sector participation and electricity market reform (Department of Mineral Resources and Energy, 2019; Department of Electricity and Energy, 2025; National Business Initiative, 2025).

Wind energy has already demonstrated its value in South Africa. Through the REIPPPP, the country attracted private investment, delivered utility-scale renewable energy projects, reduced renewable energy tariffs across bid windows and established a credible IPP market. This track record confirms that wind can be procured, financed, constructed and operated in South Africa when enabling conditions are present (Eberhard et al., 2014; Eberhard and Naude, 2016; CSIR Energy Centre, 2020).

The next phase is different. The question is no longer whether wind can be procured and built in South Africa. The question is whether the system can support sustained, higher-volume deployment in line with IRP 2025 and future electricity market reform (Department of Electricity and Energy, 2025; Pinsent Masons, 2025).

IRP 2025 sets an expanded role for wind and other renewable energy technologies. This creates an opportunity to unlock investment, strengthen energy security and support industrial and regional development. However, the current system is characterised by a deployment gap between policy ambition and implementation capacity. This gap is most visible in grid availability in high-resource wind regions, but it also extends to procurement timing, permitting processes, institutional capacity, market design, localisation and skills (Department of Electricity and Energy, 2025; South African Wind Energy Association, 2025; National Business Initiative, 2025).

The wind industry's central concern is therefore not the availability of wind resource. South Africa has strong wind resources and a significant project pipeline. The concern is whether enabling infrastructure, institutions and market frameworks are being implemented quickly and coherently enough to convert that pipeline into operating generation assets (Trade and Industrial Policy Strategies, 2022; South African Wind Energy Association, 2025).



TABLE B1 Energy Policy Evolution

Policy / Programme	Contribution to Wind Sector Development	Implementation Lesson for IRP 2025
White Paper on Renewable Energy (2003)	Established an early policy commitment to renewable energy diversification (target: 10,000 GWh of renewable energy contribution).	Policy ambition must be matched by practical implementation mechanisms.
IRP 2010	Provided a formal long-term planning framework, allocating approximately 9.2 GW of wind by 2030 and giving wind a defined role in the electricity mix.	Capacity allocations are useful only when supported by procurement and grid readiness.
REIPPPP	Demonstrated that competitive procurement can mobilise private investment and deliver projects, with more than 3,300 MW of wind procured by 2021.	Predictable procurement cycles are essential for market confidence, supply chains and skills retention.
IRP 2019	Reinforced the importance of renewable energy in the national electricity plan.	Implementation delays and grid constraints can weaken the impact of planning certainty.
IRP 2025	Sets a more ambitious renewable energy pathway, targeting approximately 43 GW of wind capacity.	The next phase requires a coordinated delivery roadmap across grid, procurement, permitting, storage, market design and skills.

Sources: Department of Minerals and Energy (2003); Department of Mineral Resources and Energy (2019); CSIR Energy Centre (2020); Trade and Industrial Policy Strategies (2022); Department of Electricity and Energy (2025); South African Wind Energy Association (2025).

Basis of Industry Input

This position paper is informed by structured industry engagement, including survey responses and focus group discussions with stakeholders across the wind energy value chain. Participants included developers, independent power producers, consultants, advisory firms, equipment manufacturers and policy or regulatory participants. The engagement approach drew on recognised qualitative and focus group methods for interpreting stakeholder perspectives in complex implementation contexts.

A total of 13 industry responses were captured and analysed against key implementation themes. The sample is not presented as a statistically representative national survey. It is used as an indicative evidence base reflecting informed industry perspectives on IRP 2025 implementation readiness, risks and enabling requirements.

The analysis considered both quantitative responses and qualitative inputs. Likert-scale responses were used to test the level of agreement with key propositions. Ranking questions were used to identify priority risks and interventions. Open-ended inputs and focus group contributions were used to identify the reasons behind member views and to develop industry recommendations.

The responses were grouped into practical implementation themes relevant to the IRP 2025 wind deployment challenge: grid and transmission, procurement and demand certainty, permitting and regulatory approvals, policy and institutional coordination, market design, storage and flexibility, supply chain readiness, localisation, finance, skills and social licence.



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Evidence from Industry Engagement

Industry engagement confirms that the barriers to wind deployment are systemic and interconnected. The sector does not experience grid access, procurement certainty, permitting, finance, supply chain capability and skills as separate issues. These issues interact and often reinforce one another. A project may have resource quality, land rights, investor appetite and advanced development work, yet still fail to proceed if grid capacity is unavailable, procurement timing is uncertain or approvals are delayed (South African Wind Energy Association, 2025).

TABLE B2 Key Industry Engagement Themes

Industry Finding	Implication for IRP 2025 Implementation
Grid and transmission are the binding constraint	Industry respondents identified grid access and transmission capacity as the decisive factors affecting whether otherwise viable projects can proceed to financial close and construction. Grid constraints affect project feasibility, financing, procurement participation and regional development. They also influence whether the industry can maintain a credible project pipeline.
IRP capacity allocations do not automatically create bankable demand	The IRP provides a planning signal, but projects require bankable demand through public procurement, private procurement, wheeling, bilateral contracts and emerging market mechanisms. Irregular procurement cycles undermine supply chain investment, skills retention and long-term planning.
Permitting and regulatory fragmentation increase cost and delay	Participants identified permitting complexity, land-use approvals, institutional fragmentation and inconsistent requirements as material risks to development timelines. These delays increase development costs, create uncertainty for financiers and affect project bankability.
Policy ambition and institutional implementation are not yet fully aligned	The industry recognises the value of IRP 2025 as a planning instrument. However, there is concern that policy ambition is not yet supported by sufficient institutional capacity, coordination mechanisms or implementation accountability.
Supply chain and localisation require stable demand	The industry supports localisation and industrial development, but local capability must be built on predictable procurement volumes, realistic timelines, supplier development and cost competitiveness. Localisation obligations that are not matched by domestic capability may increase costs and delay deployment.
Skills development depends on project pipeline stability	The sector has developed important capabilities, but specialised skills remain limited in areas such as grid engineering, construction management, high-voltage electrical work, turbine technology, blade repair, SCADA, data analytics, commercial structuring and market operations. Stop-start procurement undermines skills retention and training investment.
Storage, flexibility and market design are now core deployment enablers	Higher levels of wind penetration require system flexibility, storage, ancillary services, curtailment rules, dispatch arrangements, wheeling frameworks, bilateral trading and market mechanisms capable of supporting variable renewable energy at scale.

Sources: SAWEA member survey and focus group inputs, interpreted alongside Trade and Industrial Policy Strategies (2022).

Priority Barriers to Implementation

5.1 Grid Access and Transmission Expansion

Grid access is the most urgent implementation risk for IRP 2025 wind capacity. Wind projects are concentrated in regions with strong resources, but these regions often face transmission constraints or limited available grid capacity. As a result, the ability to connect to the grid has become a primary determinant of whether a project can proceed (Eskom, 2023; International Energy Agency, 2025; South African Wind Energy Association, 2025). NTCSA's Transmission Development Plan (2025–2034) puts numbers to this challenge: integrating approximately 56 GW of new generation capacity will require some 14,500 km of new transmission lines and 133,000 MVA of transformer capacity, at an estimated cost of R440 billion. Delivering this at the required pace of roughly 1,450 km of new lines a year, against a recent build rate closer to 800 km a year, is the single largest execution risk to IRP 2025.

The industry requires greater transparency and certainty on available grid capacity, connection queues, transmission expansion timelines and the criteria used to allocate grid access. Without this, developers and financiers face uncertainty that affects project selection, bid strategy, investment decisions and development expenditure (Eskom, 2023; National Business Initiative, 2025).



The industry also supports alternative financing and delivery models for transmission infrastructure, provided these are implemented under a clear regulatory framework and aligned with national transmission planning. Private sector participation should be considered where it can accelerate delivery, reduce fiscal pressure and unlock high-priority grid corridors (International Energy Agency, 2025; Pinsent Masons, 2025).

5.2 Procurement and Demand Certainty

The IRP provides capacity allocations, but industry investment decisions require credible demand pathways. Predictable procurement is essential not only for developers and investors, but also for OEMs, EPC contractors, local suppliers, skills institutions and communities. Stop-start procurement weakens the sector's ability to plan, invest and retain capability (Eberhard et al., 2014; Trade and Industrial Policy Strategies, 2022).

The future procurement framework should recognise that wind deployment will be supported by multiple channels: REIPPPP and other public procurement programmes, private PPAs, wheeling arrangements, bilateral contracts, traders and market-based procurement under electricity market reforms. These channels should be coherent rather than fragmented (Cliffe Dekker Hofmeyr, 2025; Pinsent Masons, 2025).

The industry therefore calls for a clear procurement roadmap that indicates expected volumes, timing, procurement mechanisms and links to grid readiness. This will help improve bankability, reduce project development uncertainty and strengthen supply chain planning.





Wind deployment at scale requires a power system capable of managing variability and delivering flexibility.

5.3 Permitting, Land and Regulatory Approvals

Permitting is a material implementation risk for wind projects. The sector faces multiple approval processes across environmental authorisations, biodiversity and avifaunal requirements, land-use approvals, Section 53 and related land processes, municipal approvals, aviation approvals, heritage approvals, water-use approvals where applicable and grid connection processes.

The industry does not advocate weakening environmental or social safeguards. Instead, it calls for more predictable, coordinated and adequately resourced approval processes. Delays and duplication increase project costs, create avoidable uncertainty and can undermine otherwise bankable projects.

A coordinated permitting approach should include clear statutory timelines, improved resourcing of permitting authorities, better alignment between grid, land-use and environmental processes, digital tracking of approvals and mechanisms to resolve conflicts between wind, mining, agriculture, biodiversity and community interests.

5.4 Market Design, Storage and Flexibility

Wind deployment at scale requires a power system capable of managing variability and delivering flexibility. Storage, ancillary services, day-ahead and intraday trading, wheeling, bilateral contracting, dispatch rules and curtailment principles are no longer peripheral issues. They are core enablers of high-renewable energy systems.

As South Africa moves toward a more competitive and decentralised electricity market, market design must be implemented in a way that supports bankability. Developers and financiers require clarity on trading arrangements, settlement processes, curtailment treatment, dispatch rules, revenue stacking opportunities and ancillary services participation (Cliffe Dekker Hofmeyr, 2025).

The industry supports the development of storage and flexibility frameworks that are technology-neutral, bankable and aligned with grid needs. Hybrid wind, solar and storage projects should be enabled where they improve grid utilisation, reduce curtailment risk and strengthen system reliability (International Energy Agency Wind TCP, 2023).

5.5 Supply Chain, Localisation and Industrialisation

The wind industry supports South Africa's broader industrialisation and transformation objectives. Wind deployment can contribute to local manufacturing, logistics, construction, operations, maintenance, technical services and regional economic development (Trade and Industrial Policy Strategies, 2022).

Localisation requirements that are not linked to stable demand and domestic capability can, however, create unintended consequences. Requirements that increase costs without building sustainable local industrial capacity may weaken project economics and delay deployment. Localisation policy should therefore be sequenced with predictable procurement, supplier development, skills investment and cost competitiveness (Trade and Industrial Policy Strategies, 2022).

The industry therefore recommends a localisation approach that distinguishes between immediate local participation opportunities, medium-term supplier development and long-term manufacturing ambitions. This approach should be evidence-based and aligned with procurement volumes and technology trends.



5.6 Skills and Workforce Readiness

Delivering IRP 2025 scale will require a broader and deeper skills base. Skills needs extend across project development, permitting, grid engineering, financial modelling, construction, quality assurance, logistics, high-voltage electrical work, turbine operations, blade repair, SCADA, data analytics, safety and market operations (Trade and Industrial Policy Strategies, 2022).

Skills development cannot be separated from procurement certainty. Training institutions and employers are more likely to invest in skills where there is a visible and sustained project pipeline. Stop-start procurement leads to talent loss, poaching, retraining costs and reliance on external expertise (Trade and Industrial Policy Strategies, 2022; South African Wind Energy Association, 2025).

A coordinated wind skills plan should be developed with industry, SETAs, SARETEC, universities, TVET colleges, OEMs, EPC contractors and government. This plan should cover entry-level, specialist and leadership capabilities and should align training programmes with expected deployment volumes.

5.7 Community Participation and Social Licence

Wind projects are long-term infrastructure assets that operate within local communities. Successful deployment therefore depends not only on technical and financial feasibility, but also on social legitimacy. Community participation, socio-economic development, enterprise development, landowner relationships and transparent benefit-sharing structures remain important to project success.

The industry should strengthen community engagement practices so that local participation is not treated as a compliance exercise. Clear communication, early engagement, realistic expectations, transparent governance of community benefit structures and alignment with local development priorities are essential to reducing project risk and improving developmental outcomes.

06

International Lessons for South Africa

International experience confirms that wind deployment succeeds when policy ambition is matched by implementation capability. The most relevant lesson for South Africa is that generation planning, grid investment, procurement design, market reform, industrial development and public participation must be coordinated rather than treated as separate policy tracks.

TABLE B3 International Lessons

Country / Model	Relevant Lesson	Implication for South Africa
Denmark	Long-term policy consistency, public participation and system planning supported sustained wind deployment.	South Africa should combine policy certainty with public legitimacy and coordinated system planning.
Brazil	Transparent auctions and long-term contracting helped mobilise private investment in an emerging-market context.	Procurement frameworks must be predictable, transparent and aligned with system needs.
China	Rapid renewable energy expansion was supported by state-led grid and industrial investment.	Generation capacity targets must be matched by transmission expansion and supply chain capability.
Germany	Decentralised ownership and public participation supported social acceptance, although grid integration remained challenging.	Community legitimacy and grid readiness must be addressed together.
India	Competitive auctions reduced prices but implementation challenges persisted where grid, contracting and institutional coordination lagged.	Low tariffs alone do not guarantee delivery. Implementation readiness is essential.

Sources: Elliott et al. (2024); Nordic Policy Centre (2023); Climate Policy Hub (2023); National Energy Administration (2024); Climate Energy Finance (2025); Clean Energy Wire (2018); International Energy Agency (2024); Plehwe and Gunaydin (2022); Institute for Energy Economics and Financial Analysis (2025); KP Energy (2026).



Industry Recommendations

The following recommendations are intended to shift IRP 2025 from planning ambition to implementation delivery. They are grouped into immediate, medium-term and long-term priorities.

7.1 Immediate Priorities: 0 to 12 Months

- Publish an IRP 2025 wind implementation roadmap linking capacity allocations to procurement timelines, grid readiness, permitting pathways and market reform milestones.
- Improve transparency on grid capacity, connection queues, grid allocation criteria and transmission expansion timelines.
- Establish a coordinated permitting workstream for renewable energy projects, involving national, provincial and municipal authorities.
- Provide predictable procurement signals across REIPPPP, private procurement and market-based procurement channels.
- Clarify curtailment, dispatch, grid connection and settlement principles that affect wind project bankability.
- Identify quick-win grid connection process improvements, including decision timelines, standardised information requirements and escalation mechanisms.
- Create a structured SAWEA-government-NTCSA-regulator engagement platform focused on IRP 2025 implementation barriers.



7.2 Medium-Term Priorities: 1 to 3 Years

- Accelerate transmission expansion in high-potential wind regions and align grid investment with generation procurement planning.
- Enable private sector participation and alternative financing models for transmission infrastructure where appropriate.
- Develop bankable storage, flexibility and ancillary services frameworks that support wind integration.
- Implement coordinated and time-bound permitting processes supported by digital tracking and clear institutional accountability.
- Align localisation requirements with realistic domestic capability, predictable procurement volumes and supplier development support.
- Develop a national wind skills and workforce readiness plan aligned with expected deployment volumes.
- Strengthen municipal readiness for wheeling, land-use approvals, distribution-level connections and local infrastructure coordination.

7.3 Long-Term Priorities: 3 to 10 Years



Build a coordinated wind industrialisation strategy linked to sustained deployment volumes and technology trends.



Embed market reform in a manner that supports bankable long-term investment and efficient system operation.



Strengthen community participation models and improve the developmental impact of wind projects.



Develop enduring coordination mechanisms between government, NTCSA, NERSA, municipalities, industry and financiers.



Support regional economic development around wind corridors, including logistics, ports, component handling, technical services and O&M hubs.



Establish a monitoring framework to track progress from IRP allocation to procurement, financial close, construction, grid connection and operation.

Required Actions by Ecosystem Partners

Successful implementation of IRP 2025 wind capacity requires shared accountability. The following ecosystem actions are recommended:

TABLE B4 Stakeholder Engagement List

Stakeholder	Required Action
Department of Electricity and Energy	Publish and coordinate an IRP 2025 implementation roadmap that aligns procurement, grid, market reform and enabling policy actions.
NTCSA	Provide transparent information on grid capacity, connection queues, transmission expansion timelines and grid access processes.
Eskom and grid stakeholders	Ensure consistent application of grid connection requirements and support timely technical assessments and approvals.
NERSA	Provide regulatory certainty for market reform, grid investment, tariffs, wheeling, trading and procurement-related approvals.
DFFE and permitting authorities	Improve coordination, resourcing, timelines and digital visibility of environmental and related approvals.
Municipalities	Improve readiness for land-use approvals, wheeling frameworks, local infrastructure coordination and distribution-level processes.
National Treasury and DFIs	Support risk-reduction mechanisms, blended finance and funding structures for grid, storage and strategic renewable energy infrastructure.
Financiers and investors	Engage early with industry and policymakers on bankability constraints, curtailment risk, procurement design and market reform.
OEMs, EPCs and suppliers	Support realistic localisation pathways, skills transfer, supplier development and quality assurance.
Industry and SAWEA members	Commit to responsible development, credible data sharing, skills development, community engagement and coordinated advocacy.



Implementation Roadmap

The industry recommends that IRP 2025 wind implementation be managed through an integrated roadmap with clear sequencing. The roadmap should prioritise actions that unlock bankability and remove near-term bottlenecks while building long-term system capability.

TABLE B5 Implementation Roadmap

Timeframe	Priority Focus	Key Outputs
0–12 months	Create implementation certainty	IRP 2025 wind implementation roadmap; grid capacity transparency; permitting workstream; procurement signals; curtailment and dispatch principles.
1–3 years	Remove structural bottlenecks	Accelerated transmission delivery; coordinated permitting system; storage and ancillary services frameworks; private transmission participation models; skills plan.
3–10 years	Build durable sector capability	Wind industrialisation strategy; mature electricity market mechanisms; regional wind development corridors; community benefit improvements; progress monitoring framework.



Role of SAWEA and the Wind Industry

SAWEA has a critical role to play in translating industry evidence into coordinated advocacy and practical implementation support. The association should act as a convener, evidence platform and policy interface for the wind sector.



SAWEA's role should include:

- Coordinating industry positions on IRP 2025 implementation, grid, procurement, permitting, market reform, storage and localisation;
- Engaging government, regulators, NTCSA, Eskom, municipalities and financiers on priority implementation barriers;
- Supporting evidence-based advocacy through industry surveys, grid data, project pipeline insights and implementation monitoring;
- Facilitating member collaboration on skills, localisation, supply chain development and community impact;
- Supporting constructive engagement on SAWEM, wheeling, ancillary services, curtailment and market readiness;
- Tracking progress against the IRP 2025 wind implementation roadmap and reporting on barriers requiring escalation.

The wind industry should also make clear commitments. Industry participants should support credible project pipelines, responsible land and community engagement, transparent data sharing where appropriate, realistic localisation planning, skills development and active participation in reform processes.

Conclusion: From Allocation to Delivery

IRP 2025 gives South Africa an opportunity to scale wind energy in a way that strengthens energy security, reduces emissions, attracts investment, supports jobs and contributes to industrial development. The wind sector supports this ambition and is ready to play its role.

However, successful implementation will not happen automatically. Wind capacity allocated in a plan does not become operational generation without procurement certainty, grid access, permitting efficiency, financing, supply chain capability, skills and market frameworks. The central task is therefore to close the gap between policy ambition and implementation capacity.

The industry's position is that South Africa must now move from planning to coordinated delivery. This requires an implementation compact between government, regulators, NTCSA, Eskom, municipalities, financiers, industry and communities. It also requires clear timelines, transparent processes, practical accountability and a willingness to treat grid, procurement, permitting, storage, flexibility, localisation and skills as part of one delivery system.

If these conditions are met, IRP 2025 can unlock a new phase of wind deployment that delivers reliable clean electricity, investment, jobs, industrial growth and community benefits. If they are not met, the country risks deepening the gap between megawatts on paper and megawatts on the ground.



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Appendix A: Methodological Note

This position paper draws on member survey responses, focus group inputs and desktop review of relevant policy and market context. The engagement process was designed to identify the practical barriers, risks and enabling conditions affecting wind deployment under IRP 2025.

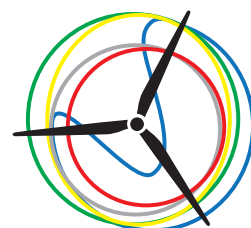
The survey included Likert-scale questions, ranking questions and open-ended questions. Responses were reviewed thematically and grouped into implementation categories aligned with the wind project lifecycle and broader electricity system reform. The focus group inputs were used to test and enrich the interpretation of survey findings.

Because the number of responses was limited, the findings should be read as indicative industry input rather than statistically representative evidence. The value of the engagement lies in the quality of informed stakeholder insights and the consistency of themes emerging across the responses.



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