Final Report, APRIL 2024

Tracking Progress Towards a Just Transition

A monitoring, evaluation and learning framework to guide justice-oriented, socially owned transition tracking in South Africa

About this Report

This report is the outcome of a process led by the Presidential Climate Commission's Monitoring and Evaluation Working Group to develop an approach to just transition monitoring and evaluation – which actors can draw on for their monitoring, evaluation and learning (MEL) work as it develops. It maps the current landscape of just transition (JT) tracking and evaluative efforts and anticipates greater alignment and coordination over time towards a robust and collectively owned JT MEL system. These efforts will drive an understanding of whether we are on course for a just transition.

The report is authored by Megan Euston-Brown, Melandri Steenkamp and Zanie Cilliers (Sustainable Energy Africa) and Mike Leslie, Cara Hartley, Mildred Nakkungu and Lelethu Bodlani (PDG).

The report benefited from the review and inputs from the World Resources Institute, the UN-Ops Initiative for Climate Action Transparency (ICAT) program, Scotland's Just Transition Commission, the South African Monitoring and Evaluation Association, the Just Energy Transition Investment Plan Project Management Unit, the Department of Forestry, Fisheries and the Environment, and the Department of Planning, Monitoring and Evaluation.

The report was produced thanks to generous support from UN-Ops ICAT programme. We are grateful for their support.

About the Presidential Climate Commission

The Presidential Climate Commission (PCC) is a multi-stakeholder body established by the President of the Republic of South Africa. The PCC advises on the country's climate change response and supports a just transition to a low-carbon climate-resilient economy and society.

The PCC produces recommendations to government based on research and evidence and facilitates dialogue between social partners – ultimately aiming to define the type of economy and society we want to achieve, and detailed pathways for how to get there.

Contents

Acronyms and abbreviations

COGTA	Department of Cooperative Governance and Traditional Affairs
DALRRD	Department of Agriculture, Land Reform and Rural Development
DFFE	Department of Forestry, Fisheries and the Environment
DMRE	Department of Mineral Resources and Energy
DPME	Department of Planning, Monitoring and Evaluation
DTIC	Department of Trade and Industry and Competition
GHG	Greenhouse Gas
JET	Just Energy Transition
JET-IP	Just Energy Transition Investment Plan
JT	Just Transition
M&E	Monitoring and Evaluation
MEL	Monitoring, Evaluation and Learning
PCC	Presidential Climate Commission
SAMEA	South African Monitoring and Evaluation Association

Introduction

South Africa has ambitious goals for reducing GHG emissions and improving climate resilience. In August 2022 Cabinet adopted the **Just Transition Framework**, which sets a vision and goals for a just transition in response to climate change. South Africa is on a course. This guiding document responds to the question: *how will we know how we are we faring*?

Just transition sits at the nexus of multiple things – efforts at all levels (local, provincial, national, international), work in different sectors, the link between climate and development. The road ahead is long and unpredictable. Tracking of progress needs to locate itself within this context, making use of information that already exists in these difference spheres and identifying gaps.

This JT MEL Framework is **a framework for those involved in generating, interpreting and using evidence** about the Just Transition. It is designed – like the sociable weavers' nest – to accommodate all social partners, across the multiple dimensions of just transition. It promotes a shared framing of the issues for which evidence is sought.

The approach is **principles based**. It does not prescribe methodologies for monitoring, evaluating, and learning about the Just Transition in South Africa but instead promotes principles that should be applied when doing so. For example, the application of the principle of 'Justice-driven and transformative' (Section 2) would encourage Just Transition MEL activities to evaluate interventions not only in terms of their effectiveness and efficiency, but also as to whether they are helping or hindering the systemic transformation that is needed.

This document speaks about a **MEL Framework and a MEL System**. This document is the MEL Framework. It proposes concepts, principles, a theory of change and tools for monitoring, evaluating and learning about the Just Transition.

The MEL System speaks to the ecosystem of actors who generate and use evidence to monitor, evaluate, and learn about the Just Transition in South Africa. An ecosystem is "self-organising"; in other words, actors are doing MEL for their own purposes, with varying degrees of alignment within subsystems[1]. This document maps some of the prominent actors already undertaking just transition related tracking and their activities (Section 3).

The MEL Framework will be formative in aligning and coordinating these nascent MEL system efforts, inviting actors to apply the framework to their work where it makes sense for them to do so. The more we align our work to a shared framework, and interact with each other's evidence, the more coherent and complete the collective evidence base – and the better our decisions.

---

[1] For instance, the public sector is designed to have a high degree of alignment, whereas non-government organisations tend to be more diverse in how MEL is done. Efforts to increase standardisation and alignment are underway in the impact investment industry – this is an example of actors "self-organising" for their own purposes.

Developed for the Presidential Climate Commission (PCC)[2] with support from the Initiative for Climate Action Transparency (ICAT), this document outlines the emergent Just Transition Monitoring, Evaluation, and Learning (MEL) Framework in South Africa, across four key sections:

1. **Section 1: Scope and dimension** provide a snapshot of the issues that require tracking. It describes how this MEL framework was developed, including insights from literature.

2. **Section 2: Consolidating an approach** offers guidance on conducting Just Transition MEL, including principles to inform the approach, a theory of change and logical framework.

3. **Section 3: A nascent MEL ecosystem** maps existing relevant work which the JT MEL Framework seeks to strengthen.

4. **Section 4: Operationalising the Framework** suggests actions for stakeholders enhance and expand the MEL System over time.

Stakeholders are encouraged to apply and adapt the framework to meet their needs and collaborate with each other to iterate the framework itself and to improve the overall understanding and progress of South Africa's just transition.

---

[2] The PCC's Monitoring and Evaluation Commissioners Working Group has overseen the development of this MEL Framework and will become its custodian once completed. The working group consists of PCC commissioners, government representatives, civil society representatives, community members, academia and other experts in the MEL field. It was established in 2022.

Section 1: Scope and dimension

What is the Just Transition?

This MEL Framework forms itself around the Just Transition Framework (PCC, 2022a) and should be read in conjunction with it. The Just Transition Framework, led by the Presidential Climate Commission and adopted by Cabinet in August 2022, built on prior consultations on just transition, notably within the National Planning Commission (NPC, 2019), the National Economic Development and Labour Council (NEDLAC, 2020) and the Climate Change Bill process, which all contributed to defining a just transition.

Box 1: A nationally defined Just Transition, as set out in the Just Transition Framework

A just transition aims to achieve a quality life for all South Africans, in the context of increasing the ability to adapt to the adverse impacts of climate, fostering climate resilience, and reaching net-zero greenhouse gas emissions by 2050, in line with best available science.

A just transition contributes to the goals of decent work for all, social inclusion, and the eradication of poverty.

A just transition puts people at the centre of decision making, especially those most impacted, the poor, women, people with disabilities, and the youth—empowering and equipping them for new opportunities of the future.

A just transition builds the resilience of the economy and people through affordable, decentralised, diversely owned renewable energy systems; conservation of natural resources; equitable access of water resources; an environment that is not harmful to one's health and well-being; and sustainable, equitable, inclusive land use for all, especially for the most vulnerable.

Source: Just Transition Framework, PCC, 2022a

The Just Transition Framework sets an ambitious vision that requires **transformation**: 'The framework therefore supports South Africa's broader efforts to redesign the economy to the benefit of most citizens to enable *deep*, *just*, and *transformational* shifts (i.e., addressing the triple challenges), in the context of delivering an effective response to climate change (i.e., improving resilience, making substantial cuts to greenhouse gas emissions, and protecting and promoting the health of communities)' (PCC, 2022a). **Justice** is understood in three dimensions, as shown below.

Box 2: Three types of Justice

Restorative justice involves repairing past injustices caused by environmental degradation and social inequality. Restorative justice is crucial for healing past divisions and rebuilding trust among stakeholders. Key pillars that require attention and monitoring under restorative justice include a green decent work agenda, social protection and access to health care, land reform and environmental rehabilitation (Baloyi et al., 2022, p. 14; PCC, 2022c).

Procedural justice focusses on inclusive and transparent decision-making processes, achieved through mechanisms such as public hearings and stakeholder consultations that enable all affected parties to provide meaningful input. The Partnering Implementation Model adopted by the PCC indicates that this should go beyond participation to real partnership in action (EDP, 2023).

The objective of **distributive justice** is to ensure that the costs and benefits of the transition are shared equitably through social protection programs, employment training and placement, and community-based renewable energy initiatives (PCC, 2022a; PCC 2022, p. 9). The Just Transition Framework roots itself in defence of the most vulnerable in our society and environment.

Why do we need a monitoring, evaluation and learning framework about the Just Transition?

It is about using evidence for decision-making

The MEL Framework provides an overview of the issues and results that matter for understanding progress, and a high-level theory of change for how these are related to each other. This points to the kind of evidence that will establish a measure of progress. By highlighting where progress is going well and where course corrections are needed, this evidence can lead to learning and recommendations, which are intended to hold parties accountable to their commitments and influence strategies, policies and enablers towards better outcomes.

Monitoring and evaluation are sometimes seen in narrow terms as tracking of numeric indicators. That is certainly part of what we need but is by no means all. For the Just Transition, "monitoring, evaluation and learning" (MEL) should be thought of in a broad sense. It is about **using evidence to make judgements that inform ongoing decision-making**, to effect positive change. The best insight emerges from combining different types of evidence, of good quality, within a coherent framework.

Evidence about what? A snapshot of the issues that matter

The Just Transition sits at the nexus of multiple things – efforts at all levels (local, provincial, national, international), work in different sectors, the link between climate and development. Figure 1 captures a snapshot of the dimensions – or issues - that matter most for monitoring, evaluating, and learning about the Just Transition – *now*. It defines the scope of relevant evidence, drawing on the JTF and shaped by engagement with useful concepts within the literature on M&E of complex system change.
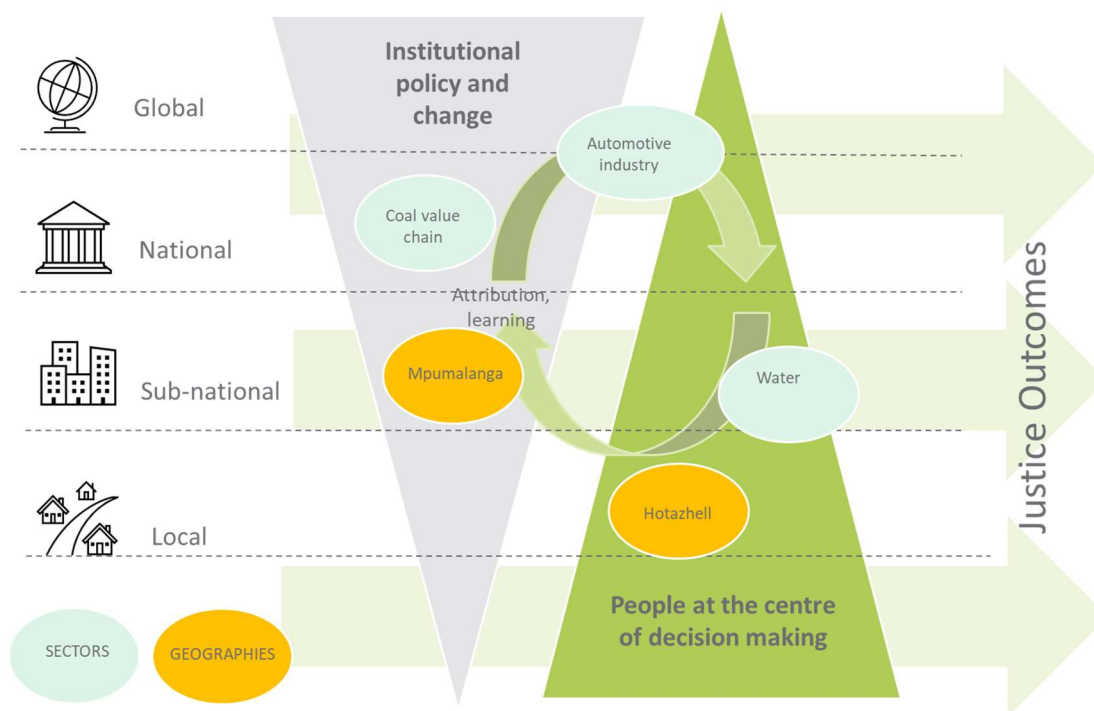
Figure 1: Scope of the Just Transition MEL Framework

The snapshot shows layers of efforts taking place across levels from global to national, sub-national and local, including community. It shows that two important forces - institutional systems change and people's decision making - shape results, from top-down and bottom-up. Institutional systems as per the Just Transition Framework is not just about government institutions; it also refers to industrial development, economic diversification, financial and investment flows and social protection. All of these are shaped by the policies and plans of government and sector stakeholders.

Also illustrated are the main "lenses" to be applied, usually overlapping: the lens of geography (scale and location); the sector-specific lens; and importantly, the justice lens with its three dimensions, which play across all the levels and dimensions.

This snapshot is zoomed out. Every MEL activity or piece of evidence will zoom in or out and will apply a selection of lenses. Not all evidence will make explicit reference to the MEL Framework:

- Some evidence will be generated explicitly to give us sight of some part of the Just Transition. Over time, such evidence generation exercises will hopefully respond to this Just Transition MEL framework by aligning with, or finding expression within, the theory of change and applying the principles and concepts. This will help bring coherence and start to fill evidence gaps, especially around the justice dimensions.

- Other evidence will be generated for different purposes. This evidence may not even mention a just transition, and it may not apply the principles or concepts from the framework. But if it fits into this big picture by describing the results of interest, the forces that shape those results, or using the lenses, it can still be relevant for monitoring, evaluating, and learning about the Just Transition.

This document does not prescribe a definitive list of sectors, geographies, or institutional systems, but the Just Transition Framework of 2022 provides a starting point. Periodically, the lenses and focus areas should be reviewed and reconsidered - at minimum every five years, to align with the strategic policy framework of a term of government.

How was this framework developed?

The framework was developed over the period February 2023 to March 2024, overseen by the **PCC Working Group for Monitoring and Evaluation.** Development of the framework drew on academic literature and international/domestic best practice processes, and consultation. Just Transition MEL work is itself a new area of work globally, however there is a body of relevant climate, development, justice and equity and systems work to draw from.

In developing this framework, the PCC:

- Consulted with lead M&E implementation partners in government, the climate change lead Department for Forestry, Fisheries and the Environment (DFFE), the Department of Planning, Monitoring and Evaluation (DPME), towards integration of just transition monitoring with the national integrated planning and monitoring system, the JET PMU and JTF implementation plan development.

- Engaged the Community Action Group's M&E of the Just Transition community research team.

- Established coordinated approaches through JT MEL working sessions between DFFE, the JET PMU and the JTF implementation plan development team.

- Engaged relevant *M&E expertise* through participation in the South African Monitoring and Evaluation Association's (SAMEA) Evaluation for Just Transition Community of Practice, as well as through one-on-one consultations.

- Participated in exchanges with Just Transition (JT) M&E country processes in Nigeria and Scotland, and the World Resources Institute's parallel development of a JT Tracking guide, to be published through UN-Ops Initiative for Climate Action Transparency (ICAT) program[3]. South Africa has grappled, more than many others, with notions of transformational change and justice issues and is among the first to work on a MEL framework for a just transition; therefore, these interactions with others have been of great mutual benefit.

What can we learn from literature, consultation, and other models?

The literature review[4] and consultations confirmed just transition is about complex system change and MEL has a big role to play to help us understand what is effective (under what conditions) to drive

---

[3] UN-Ops ICAT program is also funding the development of the South African PCC's MEL Framework presented here.

[4] The full literature review can be sourced from the PCC.

those changes. Conventional, linear, theory-based monitoring and evaluation approaches will not do this adequately; a more sophisticated and adaptive type of MEL is needed (Patton, 2022). These ideas are unpacked below and have been drawn into the framework – the principles, the theory of change and logical framework. Key insights include:

Transformative intent (addressing scope, pace, and scale)

Transformative intent: Just Transition requires transformative shifts, necessitating a systems-thinking approach in the design of the JT MEL Framework (Systems in Evaluation TIG, 2018). The evaluative framework must be able to encompass multiple programs and interventions (some of which may not be directly addressing just transition but are of crucial relevance to it) and consider outcomes resulting from complex interactions, across multiple levels (governance, geographies) (Brooks and Fisher, 2014).

Transformative equity: Evaluative considerations must go beyond conventional criteria and include judgments on systemic inequities and inclusivity (DPME-SAMEA (2022a)). In making judgments about transformative equity, we will grapple with the continued contestation about the exact type of transformation that is necessary, or desired – and the timing of that transition (pace and scale). For example, whilst the application of procedural justice points to a narrow focus (such as mitigating the impact of job losses in an affected sector), with high levels of inclusivity, distributional justice seeks a broader developmental outcome (such as a robust economy through decarbonisation and diversification) (Ward, 2023)[5]. The MEL framework anticipates this uncertainty and makes provision for evidence and participation across multiple perspectives or issues, levels and geographies.

The risk of only tracking predicted results

Because the Just Transition is about complex systems change, is it insufficient simply to ask, "did it happen?" in relation to a static theory of change.

Context review: Due to the unpredictability of climate impacts and responses, focusing solely on predicted results is insufficient – the external environment can change in ways that fundamentally impact on those results. The MEL approach needs to incorporate a review of our actions, *and the evolving environment* through tracking enabling conditions and engaging with global trends, climate science and broader change in South Africa.

---

[5] This concept of 'transformative intent' is developed in the work the Climate Investment Funds Just Transition framework (Ward, M PPT presented at PCC M&E Working Group, 2023 and adapted from Makgetla and Montmasson-Clair, 2021).
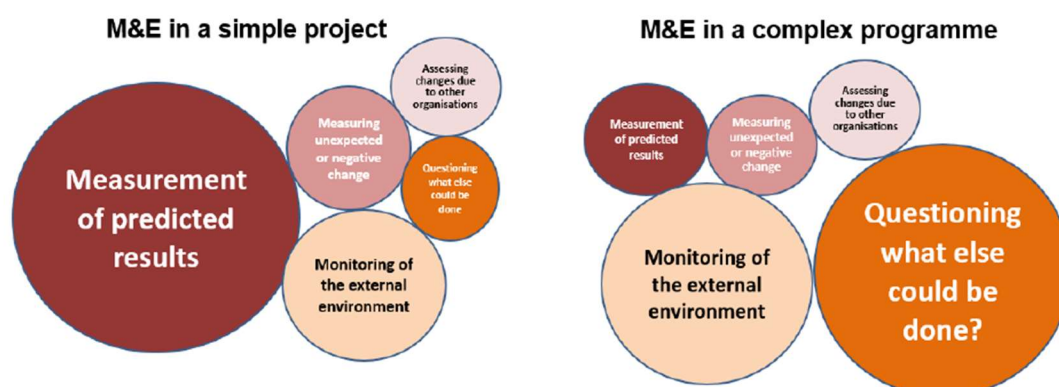
Figure 2: Results based management in different scenarios.[6]

Adaptive management: The most suitable course of action is not set in stone – the work to be done is unprecedented. We must learn, innovate and experiment as we go. One must therefore continually question *what else could be done* (sometimes called "prescriptive assumptions"). Implementation systems must make it possible to change the plan – even significantly – and the MEL function should generate evidence about whether such change is needed. There needs to be a tight relationship between planning, MEL, and course correction.

Linear and non-linear approaches: Just transition issues – and responsibilities - intersect in complex ways and one intervention's outcome may be another intervention's input. We need to embrace both "linear" and "non-linear" approaches to understanding results in the complex context of just transition – and learn to innovate around when to employ these.

For change of the scale and nature sought in the Just Transition, causality will be less of a focus than reducing uncertainty about contribution (among the many contributing factors) to the desired impact to an acceptable level (Mayne, 2008). At the same time, in some circumstances the best way to make sense of goals and progress will still be a linear expression of what needs to be done, with what resources, to what end. Linear models (such as a basic input-activity-output-outcome-impact results chain) are familiar and easy to communicate and can be adapted to show complex interactions.

Seek dissent as well as consensus

It's crucial to capture diverse perspectives, including dissent, within the JT MEL framework. This involves addressing the asymmetry of power, consideration of *how* change did or did not happen (not only whether it happened) and the facilitation of robust, constructive debates on contested issues. These will range across transition financing, investment, ownership models, technology choices, the pace and scale of the transition.

Alignment with the Just Transition MEL Framework, and integration of social partners into the Just Transition MEL System, will not mean uniformity. A well-performing Just Transition MEL system is one

---

[6] Source: Intrac for civil society (2019)

that increasingly satisfies stakeholders' information needs, enabling them to make sound judgments and take well-informed action, even where there remain some differences in interpretation and application of evidence in relation to the respective agendas.

Monitoring, evaluation and learning as interventions

The MEL Framework itself plays a role in shaping dynamics and driving progress. Emphasis is placed on how evidence is generated, inclusion of affected communities, addressing barriers to participation, and fostering a learning culture (AfrEA, 2021).

Overall, the MEL Framework for Just Transition is designed to be flexible, inclusive and responsive to evolving challenges and opportunities in achieving a just transition.

Section 2: Consolidating an approach

What are the principles that should inform our approach?

Literature suggests a principles-led, rather than methodology-prescriptive approach and shaped the principles selected. These principles guide the MEL framework's development and MEL initiatives – including designing such work:

Complementary and bounded: *Utilise existing tracking and MEL efforts without duplication, ensuring coordination and alignment to answer Just Transition-related questions (i.e. the socio-economic consequences of climate policy, particularly for the most vulnerable).*

This framework helps construct this process, through the tracking focus (Section 2) and MEL System approach (Section 3 and 4) that maps potential 'monitoring sites' within the broader ecosystem and explores building living networks for evidence sharing and learning.

'Socially owned' framework: *Involve all social partners in the MEL Framework development, ensuring ownership, relevance and adaptability to diverse sectors and contexts.*

The MEL Framework is for all social partners working with evidence about the Just Transition – collectively forming the MEL system. This includes government, labour unions, the private sector, civil society, affected communities, academics and research think-tanks. It should express their understanding of what is to be achieved, must be relevant for their work, and must be theirs to interpret, apply, and change as they see fit, both as users of framework outputs and providers of input into the framework.

Modalities for this cross pollination are outlined (Section 4) but will need enhancement over time. Transition impacts monitored should also be both quantitative and qualitative to provide a broad picture of progress (perceptions and experience of stakeholders plus quantifiable metrics) at local, provincial and national scales.

Enhancing transparency: *Make evidence widely accessible, disclose how evidence is generated, engage stakeholders transparently, and communicate evaluative judgements clearly.*

MEL efforts in relation to the Just Transition should add impetus to existing efforts to level the playing field in terms of access to information and full disclosure in relation to the information or evidence provided. This builds trust and supports a diversity of information users and uses.

Enhancing accountability: *Direct resources to civil society and community-driven monitoring, track compliance with commitments, and ensure accountability mechanisms are inclusive and just.*

The 'open democracy' approach of the Community Action Group JT M&E (see Box 3 below) illustrates how evidence generated empowered community activists to hold those responsible for service delivery failures to account. When designing monitoring and evaluation approaches, special attention needs to be given to accountability *for* impacts that have traditionally been overlooked (e.g. environmental degradation; compounding gender disparities, etc) and accountability *to* stakeholders or groups that have traditionally been sidelined.

Fostering understanding for course correction: *Prioritise ongoing gathering of insights to strengthen adaptive approaches and strategies based on evidence.*

Recognising the complexity and unprecedented nature of what lies ahead, we must learn and adapt, which means investing in information portal/s and learning network/s and related capacity. Learning must be integrated into planning, reporting and policy cycles – with associated resources (Section 4 seeks to highlight the work required for this).

There is often a tension between using monitoring and evaluation for accountability or using it for learning. This should be anticipated. Doing Just Transition MEL well means finding ways to do both well.

Justice-driven and transformative: *Apply a justice lens to all aspects of the Just Transition, promote experimentation and innovation, and ensure marginalised voices are heard.*

JT MEL activities should be asking "who benefits?" at all levels and geographies and sectors highlighted within the Just Transition Framework. Interventions should be judged not only on their effectiveness in helping individuals (such as a private company providing a pension to those retrenched), but also whether they are challenging the systems that leave people needing help (helping or hindering the systemic transformation that is needed - such as policies restraining economic growth and job creation in the affected areas). This intention is illustrated in Figure 1. MEL activities should themselves seek to be inclusive and to minimize the risk for vulnerable people of participating; ensuring capability to speak, be heard, evaluate and act.

Practical: *Prioritise tracking based on available resources, address tensions and trade-offs pragmatically, and communicate these clearly.*

Given the multi-faceted nature of just transition, there is a need for the iterative identification of priority indicators for a manageable tracking system, based on resources at hand. However, in broader evaluative terms practicality means identifying and addressing tensions – in strategies, plans, and the way they find expression in MEL through theories of change or indicators – rather than glossing over them.

The theory of change and indicators developed (Section 2) are developed to span multiple facets of just transition and thus provide for evidence to addressing tensions. Sometimes a false dichotomy can be resolved by investigating what it really means in practice. But sometimes there is no ideal solution, and the role of the MEL function is then to clearly communicate to the strategy function that there is a trade-off to be made. Some less than ideal solutions may include prioritising an environmental benefit over an economic one or vice versa; limited public participation; committing to a single (imperfect) definition of an indicator; brief rather than extensive research. The principle of Enhancing Transparency can be usefully applied in such cases.

Theory of Change for the Just Transition

South Africa's Just Transition Framework is inherently based on a theory of change: certain changes are required to achieve the results we aim for, and ultimately to achieve the vision. Whereas an earlier section presented a snapshot of the (continuum of) issues that matter, the theory of change describes the causal relationships, and changes that social partners are working towards.

The theory of change can be stated concisely or in more detail. Two formats are presented here: a concise **if-then statement**, and a **high-level theory of change** consisting of a graphic and table. These two versions can be used to communicate the overall intention of the Just Transition. They can also be used to foster alignment with the theories of change of complementary interventions. They are used in this document to derive a prioritised set of indicators for tracking. Similarly, different role players may unpack (certain parts of) the theory of change into more detail for their own purposes.

Derived from the Just Transition Framework and informed by literature, consultation and collaboration with others developing just transition related theories of change (see Section 1), the theory of change should evolve and be updated over time. Arrangements for this are discussed in Section 4.

The theory of change in a nutshell

Put as a concise if-then statement, the theory of change is:

- If South African institutional systems can be transformed to be supportive and responsive to the Just Transition, while…

- …decarbonising the economy at a pace and scale that optimizes for development, by…

- …placing procedural, distributive and restorative justice at the centre of decision-making, then…

- …South Africa will transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century."

High level theory of change

The diagram below introduces the key components of the theory of change. It is linear (causes and effects flow from left to right) and uses common theory of change components, for ease of communication. But it also includes Outcomes Frames, to cluster related outcomes without oversimplifying causal relationships.
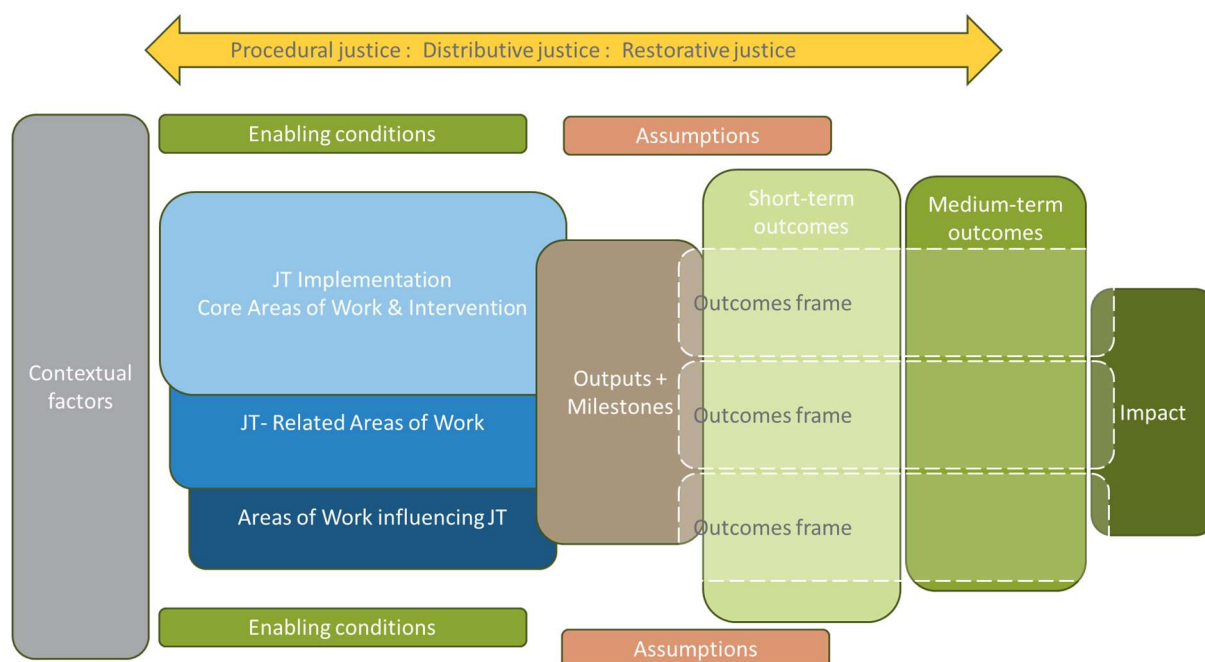
Figure 3: Schematic of the High-Level Theory of Change illustrating multiple interventions and the overlay of the Outcomes Frames as organising mechanism to 'marry' the traditional linear approach with the flexibility required with multiple evaluations.

The **context** identifies human induced climate change and extractive economic production as mutually reinforcing of poverty and inequality and the South African history of the mineral-energy complex (and related colonial and apartheid systems) that conveys a particular racial and gender characteristic to marginalisation.

Political will and effective governance and related trust in public institutions are critical **enabling conditions** of a just transition. Non-state actors must prioritise climate change and engage in finding common agendas, with the meaningful participation of affected communities and groups.

The theory of change is based on the **assumptions** that capital can be sourced for the JT and JT finance may address transformative justice; that the global political economy doesn't significantly affect opportunities, and environmental system changes don't exceed tipping points.

These elements – context, critical enablers and assumptions - are significant in a complex system change, requiring reflection on 'what else could we be doing'.

Within this framing, efforts are underway to produce outputs and outcomes. These are categorised in the diagram above as **JT implementation** (these are the core areas of work and interventions that social partners undertake explicitly for the Just Transition); JT-related areas of work; and areas of work influencing the JT. Milestones and outputs are produced; these are expected to contribute to outcomes, and the ultimate intended impact.

While Figure 3Figure 4 above shows the relationships between these components and results, Figure 4 articulates them (i.e. what outcomes are actually sought). Note, again, that this is a high level, national theory of change and it is a simplified linear representation of changes that in fact interact in

complex ways. This (most detailed) version will be treated as a living document and will remain subject to continual updating and revision through the Learning Platform. Social partners will engage with it and propose edits and refinements, drawing on their own MEL experience, including the development of theories of change in their own spheres. The latest version (or a link to it) is on the PCC's website.

							Assumptions - Capital can be sourced for the JT; JT finance may address transformative justice; Shifts in the global political economy don't significantly affect opportunities; and Environmental system change don't exceed tipping points	
Just Transition Impact	Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century							
Outcomes	SA institutional systems are supportive of and responsive to the JT		Decarbonisation of the economy occurs at a pace and scale that optimizes for developmental benefit		People are at the centre of decision-making to adapt to climate change and its social and economic impacts			
	Finance for the Just Transition is mobilised, deployed and implemented rapidly and effectively	Transitional policy and institutional reforms strengthen capabilities and systems integration	Growth of new, low carbon economic sectors supported	Managed decline of emissions intensive sectors through social, economic & environment support mechanisms	Improved education and skills development addresses JT socio-economic opportunities	Community buy-in and voice(s) shape adaptation measures and strengthen accountability for justices in the transition		**JT-Influencing Areas of Work**
Outputs	Finance commitments to JT	Transition legislation, regulation and policies & plans	Enabling economic policy, incentives & support	Labour market support packages	Graduates, trainees and certifications	JT champions, leaders and activists conduct citizen-monitoring		
	JT projects designed & impl. ready	Institutional forums integrate/mainstream JT-related decisions	Renewable energy infrastructured developed	Transition incentives for businesses	Re-skilling and trainee support	Participation in JT project & consultation platforms		
	JT projects implemented & completed	Communication and info systems reflect JT-related content	New types of jobs and work opportunities	Rehabilitation of land	Educational and skills curriculum revisions	Social compacts forged across communities, sectors & institutions		**JT- Related Areas of Work**
Activities/ Core Areas of Work	Leadership, governance, partnerships and implementation capacity							
		Economic diversification						
		Skills development and capacity building to enable a JT						
				Fostering inclusive development and building community resilience mechanisms				
	Mobilising resources for a Just Transition							
Critical enablers	Political will and commitment to the JT							
	Effective institutional governance							
	Trust in public institutions			Trust in public institutions				
	Commonality of agendas for a coherent, coordinated response							
	State has the capabilities to meet existing basic service commitments							
			Private and non-state actors prioritise JT related actions and engagements					
Contextual factors	Human-induced activities accelerate shifts in our climate that impact all aspects of life in SA, the region and & world.							
	The economy produces a concentration of wealth, inequality, poverty and unemployment in South Africa							

Figure 4: The high-level Theory of Change in tabular form.

An important feature of the high-level theory of change is the thematic clustering of results into outcomes frames. They are used to group outcomes which are very dependent on each other and interrelated. These align broadly to the three components of the "if-then" statement:

> Outcomes frame 1: SA institutional systems are supportive of and responsive to the JT

> Outcomes frame 2: Decarbonisation of the economy occurs at a pace and scale that optimizes for development

> Outcomes frame 3: People are at the centre of decision-making to adapt to climate change and its social and economic impacts

Figure 5: Three Outcomes Frames provide a thematic clustering of results into 'outcomes'.

Using these outcomes frames is a way of communicating core thrusts of the Just Transition. They highlight the strongest themes, but in a flexible way. There remains space for outcomes to overlap, interact with each other, or occur at different points in time or space.

Outcomes Frame 1: SA institutional systems are supportive of and responsive to the JT

All systems (social, economic, environmental, and related systems that link South African institutions of the state, private sector, and international environments) must be oriented to build people's capabilities to respond to climate change and be fully integrated in the process. This includes ensuring that these systems are *effective* (especially in the sense of a capable and accountable state). They need to be re-oriented towards justice and support an inclusive and growing economy so that there are benefits to distribute.

Key systems include international finance available to fund interventions of the Just Transition, electricity regulatory reform, social security adjustments, and municipal governance. Other systems can be identified by referring to the snapshot of issues that matter (Section 1, Figure 1) – from global to local systems, and across sectors and industries.

The results in this Outcomes Frame will include changes in the policy cycle (legislation, policies, plans and budgets) as well as changes in how systems and actors interact (integration, partnership, cooperation, holding to account) and invest (responding to opportunity, risk and vulnerability; and building the needed capabilities).

Outcomes Frame 2: Decarbonisation of the economy occurs at a pace and scale that optimizes developmental benefit

Decarbonisation of the economy is central to justice. Our economic systems have entrenched the continued emission of carbon into the atmosphere, imperilling current and future generations on earth. The goal is a managed decarbonisation process that maximises developmental benefits and minimises costs. This will necessitate a fine balance, both in terms of when action is taken, for whom and with a consideration of the opportunities versus the costs, across economy, society, and the environment.

Decarbonising too slowly will mean that the window of economic opportunities arising from new investments pass or move elsewhere resulting in loss of competitiveness (and jobs), stalled technology

innovation and stranded assets. Similarly, liquidating sectors too quickly – and before we have built alternative local industries - risks compounding SA's electricity shortages and leaving some communities amid socio-economic and environmental ruin.

We need to build alternative sectors and jobs aggressively to have the ability to transform (scale). Actions must simultaneously support the diversification of the economy into new, low-carbon economic sectors while managing the decline away from carbon intensive industries. There must be a clear relationship between those two outcomes because of the implications it will have for the SA economy and the livelihoods of its citizens (pace).

Outcomes Frame 3: People are at the centre of decision-making to adapt to climate change and its social and economic impacts

The third Outcome Frame refers to how people are empowered to meet the opportunities of the JT, contribute to decision-making and engage in the processes of socio-economic change. It relates closely and follows from the changes to institutional systems and the decarbonisation of the economy so that the steps that are taken to alter systems and decarbonise are perceived to be more widely in the public interest, than for a narrow corporate interest or economic sector.

This requires a concerted effort to expand educational and skills development offerings to respond to the technical needs of new socio-economic opportunities. It means that when decarbonisation decisions are taken that will result in job losses, affected workers and communities are considered, engaged and provided for through social safety nets, re-skilling, transition support and livelihoods opportunities. This Outcome Frame is where the principles of procedural, distributive and restorative justice manifest most tangibly, as how people are involved in decision-making, who benefits and how new approaches redress structural inequity.

The scope of decision-making and the way in which people are represented in the process has serious implications for whether they consider changes to be just. This framework anticipates tension between this priority and the need for decisive leadership required to ensure that systems respond effectively, and for economic change at sufficient pace and scale. These tensions are acknowledged, and the MEL framework is designed to support, through a balanced and diverse framing of evidence, working into these spaces.

High-level logical framework (indicators)

The logical framework for the theory of change, based on Figure 5's tabular representation, outlines a set of prioritized indicators. This framework is designed for the medium-term horizon up to 2030, focusing on what's crucial for decision-making and feasible in terms of evidence generation during this period, rather than covering the entire duration of the Just Transition.

Indicators were identified based on the key concepts and practical considerations like data availability and integration with related tracking processes underway.

The point of departure was the results formulations in the Theory of Change, working systematically backwards from the impacts and outcomes, inclusive of outputs and enabling conditions. Where the impacts or outcomes reflect a combination of multiple elements, sub-components are identified to

focus the indicators (e.g. distinguishing between the economic, societal and quality of life elements in the intended impact). These provide the first level of conceptual considerations for indicator selection.

The indicators are formulated to be applicable across the *current priority sectors,* as well as *future or emergent priority areas of intervention.* Indicators are therefore not formulated at a sectoral level, except where sector elements are cross-cutting in their relationships (e.g. energy-related indicators). This transversal orientation is meant to assist with harmonizing tracking across contexts, sectors and institutions by focusing on how results manifest across cleavages.

Practically, the process of indicator selection involved detailed review of and consultation on current proposed indicators identified by other stakeholders for related monitoring, reporting and evaluation. The integration and coordination of data collection systems and reporting can leverage resources and aggregate information across data systems, resulting in efficiencies between institutional actors and supporting communication. This included consideration of indicators identified in the Just Transition Implementation Plan, the Just Energy Transition Implementation Plan 2023-2027 as well as DFFE's climate change indicators and work on the State of Climate Action Report by the PCC, among other international benchmarks and reviews[7].

Where necessary, indicators were developed or customised informed by existing data availability and the need to institutionalise a means of tracking transversal results. Persistent data gaps are reflected particularly in the Outcome indicators designated to be sourced through Evaluation or as Concept in the table below.

---

[7] The Climate Investment Funds work on Just Transition (Ward, M, 2023) and the work by the WRI on a Just Transition Tracking guide (2023-4) were formative.

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
1	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	Low-carbon economy	**South Africa achieves the Nationally Determined Contribution target of 350-420MtCO2e (incl. LULUCF) by 2030**	DFFE	Routine Monitoring	Annual	Sector; Province	Distributive
2	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	Low-carbon economy	**Net JT-related sector employment rate increases (new jobs vs losses) meet or exceed the national employment rate increase**	Statistics South Africa + PCC (TBC)	Routine Monitoring + Concept	Annual	Sector (Race & Gender); Province; Youth; Disability	Distributive, Procedural
3	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	A more just, climate resilient society	**Racial and gender disparities in employment rates in JT-related sectors decline**	Statistics South Africa + PCC (TBC)	Routine Monitoring + Concept	Annual	Sector (Race & Gender); Youth; Disability	Distributive
4	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	A more just, climate resilient society	**Cost per capita of climate related disasters stabilises or declines**	National Disaster Management Centre	Evaluation + Concept	Every 2-5 years	Disaster type	N/A
5	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	Improved quality of life	**Multi-dimensional poverty levels improve in JT targeted communities (e.g. Mpumalanga)**	JET-IP M&E Reports	Evaluation	Every 2-5 years	Province + Designated Municipalities	Distributive, Restorative

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
6	**Impact**	**Transition to a low-carbon economy and a just, climate resilient society with an improved quality of life for all by mid-century**	Improved quality of life	**Levels of respiratory illness decline in JT-affected communities (e.g. Mpumalanga)**	JET-IP M&E Reports	Evaluation	Every 2-5 years	Province + Designated Municipalities	Restorative
7	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**Just Transition overall policy and regulatory alignment qualitative assessment results (inclusive of key policies and statutory plans)**	PCC policy and implementation qualitative assessments	Evaluation	Annual	Sector	N/A
8	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**% of JT national outcome and impact indicators that can be disaggregated to municipal level**	PCC	Routine Monitoring + Concept	Annual	Municipal	N/A
9	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**% of state organs making GHG emissions reporting submissions per annum**	DFFE	Concept	Annual	Provincial + Sector	N/A
10	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**% of the working population with an employer with documented GHG emission targets**	Company Reports & PCC	Evaluation + Concept	Every 2-5 years	Sector	Procedural

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
11	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**% of district and metropolitan municipalities with evidence of demonstrable progress implementing Climate Change Response Implementation Plans**	DCoG	Evaluation	Annual	None	Procedural
12	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transitional policy and institutional reforms strengthen capabilities and systems integration	**% of identified sector departments with evidence of demonstrable progress implementing Sector Adaptation Strategies and Plans**	Departmental reports	Evaluation	Annual	Province	Procedural
13	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Finance for the Just Transition is mobilised, deployed and implemented rapidly and effectively	**Average R-value of climate finance available per annum**	PCC reports	Routine monitoring	Annual	Type of finance	Distributive
14	**Outcome**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Finance for the Just Transition is mobilised, deployed and implemented rapidly and effectively	**Total climate finance expenditure on climate and JT-related interventions by SA government as a % of national budget**	PCC reports	Routine monitoring	Annual	None	N/A

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
15	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Managed decline of emissions intensive sectors through social, economic & environment support mechanisms	**SA's Green House Gas emissions per annum (in Gigaton of CO2 emissions)**	DFFE GHG Emissions Inventory	Routine Monitoring	Annual	Sector + Province	Restorative
16	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Managed decline of emissions intensive sectors through social, economic & environment support mechanisms	**Coal power capacity (in GW)**	Eskom Reports	Routine Monitoring	Quarterly	Power station	N/A
17	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Growth of new, low carbon economic sectors supported	**Renewable energy capacity (in GW)**	National Business Initiative Reports	Routine Monitoring	Annual	Type of renewable energy (by province + Munic)	Distributive
18	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Growth of new, low carbon economic sectors supported	**Total power grid capacity (in GW)**	National Business Initiative Reports	Routine Monitoring	Annual	Type of energy	Distributive
19	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Growth of new, low carbon economic sectors supported	**Battery storage capacity (in GW)**	National Business Initiative Reports	Routine Monitoring	Annual	Province	Distributive

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
20	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Managed decline of emissions intensive sectors through social, economic & environment support mechanisms	**Natural gas consumption (in Terajoule)**	International Energy Agency	Routine Monitoring	Annual	Province	N/A
21	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Managed decline of emissions intensive sectors through social, economic & environment support mechanisms	**% of companies with emissions reduction targets for 2030 reporting to be 'on track' to achieve their targets**	Company Reports (Carbon Disclosure Project)	Concept	Every 2-5 years	Sector	Restorative
22	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Growth of new, low carbon economic sectors supported	**Number of jobs created or maintained through Just Transition related projects**	JET-IP M&E Reports + Designated reports	Routine Monitoring + Concept	Quarterly	Age, Sex, Race, Disability, Location	Distributive
23	**Outcome**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Growth of new, low carbon economic sectors supported	**Number of households benefitting from livelihoods support through Just Transition related projects**	JET-IP M&E Reports + Designated reports	Evaluation	Annual	Age, Sex, Race, Disability, Location	Distributive
24	**Outcome**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Improved education and skills development addresses JT socio-economic opportunities	**Number of workers in all JT priority sectors reskilled, upskilled and/or retrained**	JET-IP M&E Reports + Designated reports	Routine Monitoring + Concept	Quarterly	Age, Sex, Race, Disability, Location	Distributive

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
25	**Outcome**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Improved education and skills development addresses JT socio-economic opportunities	**% of TVET (Technical Vocational Education and Training) graduates and trainees from JT-related offerings in employment 6 months after training**	TVET Tracer Survey	Concept	1-2 years	Age, Sex, Race, Disability, Location	Distributive
26	**Outcome**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Community buy-in and voice(s) shape adaptation measures and strengthen accountability for justices in the transition	**% of designated priority projects that have given expression to JT justice principles**	JET-IP M&E Reports	Concept	Annual	Age, Sex, Race, Disability, Location	Distributive
27	**Outcome**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Community buy-in and voice(s) shape adaptation measures and strengthen accountability for justices in the transition	**% of survey respondents who believe they have a voice in how public institutions adapt to Climate Change**	PCC/HSRC Survey	Concept	1-2 years	Age, Sex, Race, Disability, Location	Distributive
28	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Finance commitments to JT	**R-value of new finance commitments for the JT**	PCC reports	Routine Monitoring	Quarterly	Type of finance	Distributive
29	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	JT projects designed & impl. ready	**Number of JT projects implementation ready**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Type of project + Province + Municipality	N/A

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
30	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	JT projects implemented & completed	**Number of JT projects completed**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Type of project + Province + Municipality	Distributive
31	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Transition legislation, regulation and policies & plans	**Priority JT legislation, regulation, policy & plan development/replacement**	PCC	Routine Monitoring	Quarterly	Sector + Sphere	N/A
32	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Institutional forums integrate/mainstream JT-related decisions	**Content review of designated institutional forum agendas + minutes**	PCC	Concept	Annual	Forum	N/A
33	**Output**	**SA institutional systems are supportive of, and responsive to, the Just Transition**	Communication and info systems reflect JT-related content	**GCIS content analysis**	PCC	Evaluation	Annual	Sector	N/A
34	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Enabling economic policy, incentives & support	**Estimated number of businesses benefiting from economic policy & support**	PCC	Evaluation	Annual	Sector	N/A
35	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Renewable energy infrastructure developed	**Number of EV charging stations installed**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Province + Municipality	Distributive

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
36	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Renewable energy infrastructure developed	**KMs of distribution infrastructure upgraded or extended**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Province + Municipality	N/A
37	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	New types of jobs and work opportunities	**Estimated demand for new types of jobs and work opportunities related to the JT**	PCC	Evaluation	Annual	Sector + Province	N/A
38	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Labour market support packages	**Number of individuals receiving labour market support packages**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Age, Sex, Race, Disability, Location	Restorative
39	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Transition incentives for businesses	**R-value of transition incentives claimed by businesses**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Sector	N/A
40	**Output**	**Decarbonisation of the economy occurs at a pace and scale that optimizes for development**	Rehabilitation of land	**Hectares of land rehabilitated**	JET-IP M&E Reports	Routine Monitoring	Annual	Province + Municipality	Restorative
41	**Output**	**People are at the centre of decision-making to adapt to**	Graduates, trainees and certifications	**Number of graduates in JT-priority sectors**	DHET + PCC	Routine Monitoring	Quarterly	Age, Sex, Race, Disability, Location	Distributive

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
		climate change and its social and economic impacts							
42	**Output**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Re-skilling and trainee support	**Number of people benefiting from re-skilling and trainee support**	JET-IP M&E Reports	Routine Monitoring	Quarterly	Age, Sex, Race, Disability, Location	Distributive
43	**Output**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Educational and skills curriculum revisions	**New educational offerings relevant to the JT**	DHET + PCC	Routine Monitoring	Annual	Faculty + Subject Area	N/A
44	**Output**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	JT champions, leaders and activists conduct citizen-monitoring	**Number of JT-related citizen-monitoring products/reports**	PCC	Routine Monitoring	Quarterly	Province + Organisation	Procedural
45	**Output**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Participation in JT project & consultation platforms	**Number of individuals participating in JT planning processes, project and consultation platforms**	PCC	Routine Monitoring	Quarterly	Location	Procedural
46	**Output**	**People are at the centre of decision-making to adapt to climate change and its social and economic impacts**	Social compacts forged across communities, sectors & institutions	**Number of social compacts or agreements signed for JT-related initiatives**	PCC	Routine Monitoring	Quarterly	Province + Sector + Municipality	Procedural

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
47	**Enabling conditions**	**Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors**	Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors	**Ratio of just transition financial commitments by Grant funding: SA Public Sector Budget: Loans (Concessional + commercial): Commercial finance**	JET-IP M&E Reports	Routine Monitoring	Annual	None	Distributive
48	**Enabling conditions**	**Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors**	Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors	**Public expressions of support for the JET-IP Implementation Plan by key unions and civil society organisations**	JET-IP M&E Reports	Evaluation	Annual	Industry	Procedural
49	**Enabling conditions**	**Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors**	Achieving a commonality of agenda(s) for a coherent, coordinated response from private and public sectors	**% of SAs that believe in human-induced climate change**	PCC/HSRC Survey	Evaluation	1-2 years	Province + Race + Gender + Age	N/A
50	**Enabling conditions**	**Private sector and non-state actors prioritise JT-related action and engagement**	Private sector and non-state actors prioritise JT-related action and engagement	**Public to private ratio of new Climate Finance commitments per annum**	PCC	Evaluation	Annual	Type of finance	Distributive
51	**Enabling conditions**	**State has capabilities to meet its existing basic service commitments**	State has capabilities to meet its existing basic service commitments	**% of municipalities classified to be dysfunctional**	Presidency & CoGTA	Evaluation	Annual	Municipal type	N/A

#	Level	Theory of change component	Sub-component	Indicator(s) title	Source	Type (M/E/C)	Frequency	Level (Disaggregation)	Justice lens (P-D-R)
52	**Enabling conditions**	**Trust in public institutions**	Trust in public institutions	**% of citizens that have trust in SA public institutions**	Afrobarometer Survey + Edelman Trust Barometer	Routine Monitoring	1-2 years	Province + Race + Gender + Age	N/A
53	**Enabling conditions**	**Political will and commitment to a Just Transition**	Political will and commitment to a Just Transition	**Qualitative assessment of Just Transition policy alignment in political pronouncements of government and non-government role-players**	PCC policy and implementation qualitative assessments	Concept	TBC	Political party	N/A
54	**Enabling conditions**	**Political will and commitment to a Just Transition**	Political will and commitment to a Just Transition	**% of South Africans familiar with the term "just transition"**	PCC/HSRC Survey	Evaluation	1-2 years	Province + Race + Gender + Age	N/A

How will we get the evidence we need? What are the different types of MEL that can be done?

Four broad types of MEL activities are distinguished, each defined by its purpose, frequency and who tends to engage in them. They are not defined by method or source; each type will be diverse in that sense.

This categorisation helps map the landscape of evidence generation activities, creating a guide for researchers and decision-makers to find relevant evidence and identify areas that need strengthening in the MEL System, such as identifying gaps, insufficient standardisation, etc.
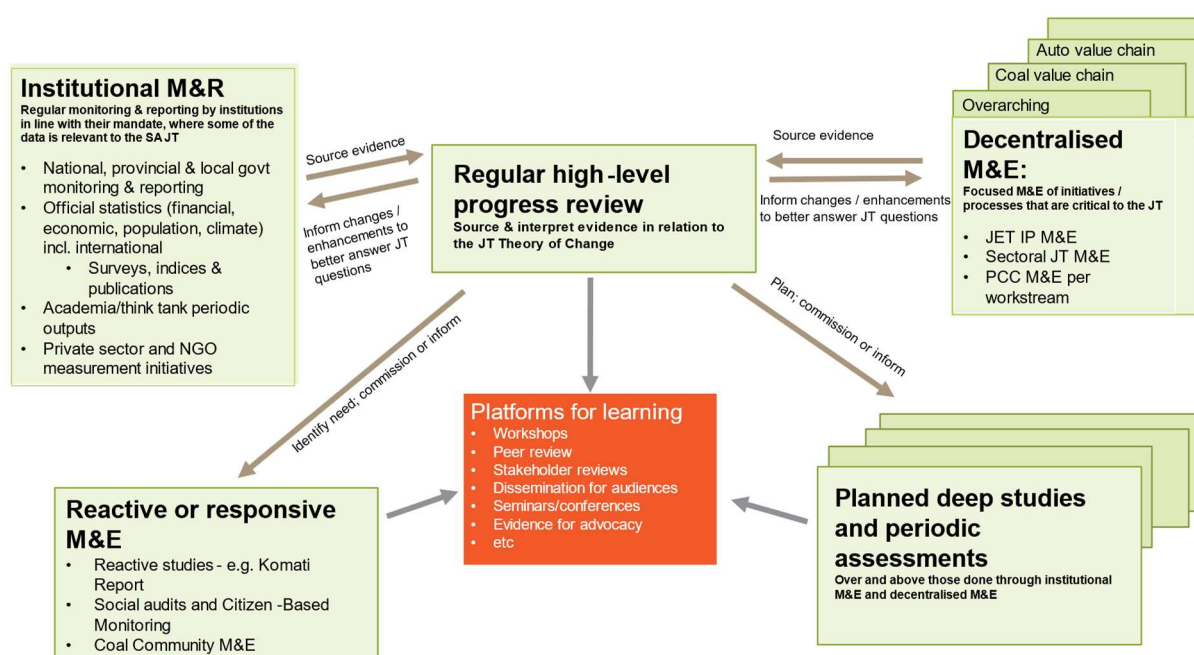
Figure 6: Map of types of monitoring, evaluation and learning in the ecosystem.

1. **Institutional monitoring and reporting** are regular monitoring and reporting by institutions in line with their mandate, where some of the data is relevant to the SA JT. This includes existing data from quarterly and annually reported performance information, or data from government agencies such as the South African Air Quality Information System. These are evidence generation exercises that institutions would have done regardless of the SA JT. The JT MEL Framework should influence data to be just transition responsive.

2. **Decentralised M&E of the Just Transition** are conceptualised explicitly with reference to the Just Transition, or large components of it – for instance, M&E of the JET-IP, or the community-driven programmes of evidence generation that focus on the justice outcomes for communities affected by decarbonisation processes (see examples in Box 3 and Box 5 below).

These would include a diversity of sources, including deep studies, and should not be "shuttered" to only look for evidence in anticipated, controlled spaces. Anecdotal evidence should have its place as part of scanning the environment and the views of community members and CSOs should be sought out in evaluations, where they can be triangulated with other sources. Public sector initiated, community-based methods such as frontline service delivery monitoring (FSDM) have potential here as well (see Figure 7).

3. **Planned deeper studies and periodic assessments** will supplement ongoing tracking with evaluations, research, narratives and case studies. These targeted, well-defined studies can be sector-specific, regional, or national, exploring learning questions and introducing innovative evaluation and learning methods.

4. **Reactive or responsive M&E** is part of a healthy MEL system in a complex and unpredictable environment, addressing risks pre-emptively or reacting to unforeseen information needs. This includes rapid studies like the investigation following the decommissioning of the Komati Power Station, with methodologies such as community consultations, aiming to draw lessons and resolve issues promptly.

Box 3: Decentralised M&E: A Community Based M&E exercise[8]

The Community Action Group (CAG) has developed community-based MEL research capacity within communities in transition affected areas – predominantly coal areas, but also from fracking and petrochemical industrial locations. Fenceline communities bring a critical voice to the evaluation process:

- They are most affected by the health and environmental impacts of mining and power station pollution and are motivated to search for restorative justice.

- Their dependence on the coal value chain means they deeply realise the need to create alternative local economies.

- Their involvement in ongoing dialogues in the environmental justice movement has built capacity and familiarity with debates, and they bring leadership in the just transition.

- Based on the ground, they are the able to ground-truth claims.

- They bring a critical approach ("how could it be different?") to current realities e.g. of local government and health system, or patriarchal traditional authorities, divisions within communities. This is essential in systems change approaches.

---

[8] Source: *Victor Munnik, Life After Coal campaign advisor and M&E Project Manager, presentation into the PCC M&E Working Group, 6 November 2023 by. Drawing on results of from the Community based participatory m&e of the Just Transition.*

Their first M&E exercise focussed on the coal mining areas and explored justice and transformative equity of the energy transition at community, local government and national government scales. Activists discovered their ability to monitor and evaluate. Community members know what they want to know and developed robust questions to ask of the transition, relating to poverty, employment, availability of food in households, and whether we are sticking to our Nationally Determined Contributions. The process was an engagement in open democracy, asking for direct accountability on governance mandates from local government and related forums.

In terms of learning, community researchers readily identify mechanisms of 'why things happen' (or don't). Their analysis is embedded in an understanding of the minerals-energy complex as the mechanism for accumulating wealth through extraction, located in the colonial and apartheid regimes, which gave rise to migrant labour. The consequences of this are visible in the social fabric and their direct experience of how this unfolds on the ground, e.g. what is the mechanism behind poor service delivery – how local government works, how they caucus, how budgeting works, etc.

Initial evaluative findings highlight the need for much greater just transition awareness and preparation across society and government and addressing the self-serving culture of governance. Communities want to build a just transition from the ground up, through ongoing support being provided to community projects, with an emphasis on creating local food economies and developing renewable energy projects. Communities want to keep control over their projects – don't want to see these hijacked by local government and people outside the community. There is a clear expectation that communities will work on mine rehabilitation and access rehabilitated land and water.

The CAG M&E experience emphasised that a JT MEL system must be one in which communities can participate. This includes getting information out of the process, not just raising the 'fence line' voice within the process. CAG note the System should enable debates and for this stakeholders must work to level the playing field in terms of access to information. The system must be accessible in terms of language and transparent in terms of data, helping to establish: how trustworthy are the statistics, who compiles them? why are they so difficult to understand? By using the system, the CAG and related community organisations will also shape the MEL framework and system over time, ensuring it remains dynamic.

Guidance for evaluation and learning and application of the justice criteria

The Just Transition Monitoring, Evaluation, and Learning (MEL) Framework acknowledges that evaluating complex systems undergoing transformation defies a singular evaluation approach and rather sets out broad principles, concepts and approaches that would distinguish this work. Applying the JT MEL Framework means:

Understanding Context: Place interventions within the theory of change.

Designing with Principles: Apply the guiding principles during monitoring and evaluation design.

Justice-Oriented Inquiry: Ask questions about justice when using available evidence.

Monitoring and reporting are crucial for tracking the Just Transition's implementation progress, but evaluations are essential for deeper analysis, learning, and improvement. Evaluations provide the value basis for rendering judgement.

A progressive and meaningful JT requires timely evaluations that meet the needs of the different stakeholders, albeit within the wider framework and with golden thread orientation to the overarching intent.

Planned and periodic evaluations ensure:

- **Continuous learning and course correction:** ensuring initiatives align (or realign, if strayed) with the Just Transition Framework and adapt based on learning about what works (or doesn't).

- **Justice upheld**: maintain awareness of procedural, distribution and restorative justice.

- **Stakeholder engagement**: provide platforms for diverse voices to assess progress – in a way that is not possible through monitoring processes alone.

- **Accountability**: Responsible parties are held accountable for meeting transition obligations.

South Africa's National Evaluation Policy Framework (NEPF, 2011) provides a solid foundation for Just Transition evaluations, aligning well with the MEL Framework's principles of justice and accountability[9]. The Department of Planning, Monitoring, and Evaluation (DPME) has expanded on NEPF to guide evaluations related to climate crisis interventions and social transformation through guidelines for integrating criteria for Climate and Ecosystems Health (CEH) and Integrating Transformative Equity into evaluations.

---

[9] This is a public sector document, but it makes ample room for adaptation depending on context. It also advances a participatory approach, including collaboration between government and other sectors, depending on the context of the evaluation. Therefore, it is a useful common point of departure for any evaluations related to the Just Transition in South Africa, including those commissioned by other social partners.

Box 4: DPME-SAMEA Evaluation Guidelines

These DPME-SAMEA guidelines encompass key aspects for consideration in Just Transition-related evaluation.

Guidance on evaluating Climate and Ecosystems Health (CEH)

The guideline emphasizes the interventions that contribute to the efforts to address the climate crises and the concurrent decline in the ecosystem, and thus fostering climate and ecosystems health. The guideline notes 3 dimensions for consideration: "(1) the impacts of the intervention on CEH, (2) the impacts of the climate crisis and ecosystem breakdown on the intervention, and (3) the adaptive capacity of the intervention." (DPME & SAMEA, 2022) These dimensions resonate strongly with the means of incorporating the justice principles referred to earlier.

https://oldwww.samea.org.za/resource?slug=resource-sameadpme-just-transition-guidelines

Guidance on Integrating Transformative Equity in evaluations

Like its CEH counterpart, the Guideline on Integrating Transformative Equity seeks to build in the principles of Transformative equity into evaluations. This guideline acknowledges the unequal impact of economic decline and climate crisis on disadvantaged South Africans. It further seeks to utilize evaluations to understand inequity and bring about transformation through influencing decision making.

https://oldwww.samea.org.za/resource?slug=resource-dpme-just-transition-guidelines

Any type of MEL evidence intended to contribute to the Just Transition – whether a monitoring report, case study, progress tracker, etc. – can be further strengthened by applying a justice lens. The following 'justice prompts' or questions illustrate how this can be done. These are by no means comprehensive or prescriptive and stakeholders are urged to adapt and grow these.

Table 1: JT Adapted Justice Principles applied in evaluation.

Criterion	Example Evaluation Questions	Definition
Procedural Justice	*Was the intervention designed and implemented with transparent and inclusive decision-making processes?* *Who participated?* *Have community needs been met?*	The extent to which the intervention's objectives, design, implementation and review include processes that support stakeholder voice, enabling the perception of fair and inclusive decision-making.

Criterion	Example Evaluation Questions	Definition
Distributive Justice	*Who is included, who is excluded?* *Does the intervention support the conditions needed for just outcomes?* *Does the intervention equitably distribute benefits and burdens?* *Does the evidence provide sufficient disaggregation?* *Did data collection methods consider factors such as sex, age, disability, economic status, migration status, and geographical location.*	The extent to which the intervention ensures an optimal outcome for all and the equitable distribution of benefits and costs, particularly to vulnerable, and historically marginalized groups. This includes assessing resource allocation for equity, considering the varying needs and vulnerabilities of different groups, assessing investments in impacted communities, and avoiding the concentration of burdens in vulnerable areas.
Restorative Justice	*Does the intervention address historical injustices, promoting the repair of the lives those affected?* *Has asymmetry been addressed?*	The extent to which the intervention considers and rectifies historical injustices including socio-economic and environmental injustice. This includes understanding the extent the intervention empowers the communities and workers who have historically borne the brunt of injustice; and consideration of whether initiatives support community revitalization, worker rights, and economic opportunities in areas where negative impacts have been concentrated.

Section 3: A nascent MEL ecosystem

Who is doing what MEL work already?

Key stakeholders are already involved in monitoring and generating evidence related to the just transition. The JT MEL framework is intended to be formative in shaping this existing resource of actors and evidence sources into a cohesive MEL system. This involves incorporating the JT MEL framework's concepts and indicators into their work and fostering collaboration and shared learning among stakeholders.

South Africa has a strong system of integrated public sector planning and reporting – the value of which, however, is a function of the quality of data collection and monitoring taking place. Whilst evaluation is part of this system there is yet limited expression of national, provincial and municipal evaluation underway, let alone in relation to the JT.

There is also extensive just transition relevant data generation, research, monitoring and evaluation being undertaken by actors outside of the state: corporate Environmental, Social and Governance (ESG) monitoring, academic studies, and monitoring and evaluative work by non-government, community-based and civil society organisations.

As understanding of the evidence landscape grows, so will an understanding of gaps and which entities may be best placed to take responsibility for filling them. The mapping below is not exhaustive, and the landscape continues to change. This provides a rich foundation to build on for tracking of a just transition and warrants ongoing efforts to shape to the JT tracking purpose.[10]

National Government

Regarding evaluations, DPME manages the National Evaluation Policy Framework, publishes evaluation guidelines, and develops evaluation methods. It contributes significantly to Just Transition MEL through capacity building and collaboration with relevant organizations.

The **Department of Planning, Monitoring, and Evaluation** (DPME) oversees government planning and evaluation efforts. It is positioned to play a crucial enabling role in integrating government evidence-sharing systems with the Just Transition MEL system, ensuring coherence across national, provincial, and local plans.

In terms of planning, DPME guides long-term and medium-term developmental plans, currently the National Development Plan, the Medium-Term Strategic Framework and associated Budget Prioritisation Framework, influencing how national goals align with the Just Transition. In the upcoming decade, as new versions of these plans are created, **DPME will significantly influence the extent of**

---

[10] A review of the evidence base at hand has been undertaken – identifying the actors and tracking work underway in South Africa and the excel based repository of data sources is lodged with the PCC. Resources are collated by sector and focal areas as identified within the Just Transition Framework.

coherence between national strategic goals and the Just Transition. Through its alignment mandate, DPME will also ensure that these goals and concepts are similarly reflected in provincial and local plans – reaching right down to community level in its "coalface" of service delivery approach, which includes tracking community service delivery experience and satisfaction.

DPME will also shape the quality of monitoring evidence that is produced as the department's commitment to integration of just transition into annual performance plans and integrated monitoring systems is a major contribution to JT monitoring.

In terms of evaluations, DPME is the custodian of the National Evaluation Policy Framework; publishes guidelines for undertaking evaluations in the public sector; and produces the National Evaluation Plan.

DPME is also responsible for *M&E capacity building* in the public sector, and its publication of relevant guidelines have been formative in the JT MEL Framework development.
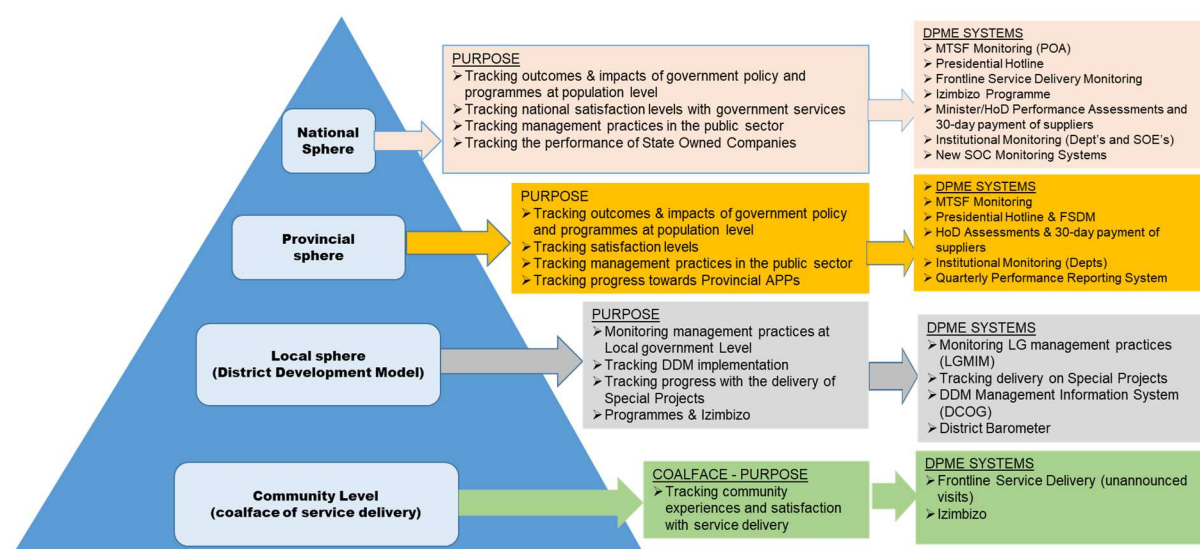

Figure 7: National Integrated Monitoring Systems (DPME, 2023). This system will be a major source of data and evidence contributing to the just transition MEL system.

The **Department of Forestry, Fisheries, and the Environment** (DFFE) is the custodian of the Climate Change Bill, the Nationally Determined Contribution, the National Climate Change Adaptation Strategy, and Annual Climate Change Report. Its role is to oversee climate policy, action and legislation on all matters relating to climate change, which demands a strong MEL system which the DFFE have been working on for the past decade. DFFE thus sources and/or generates a considerable volume of evidence, relevant to the JT MEL system, as part of these responsibilities.

The Climate Change Bill makes the DFFE responsible for the oversight of the **Sectoral Adaptation Strategies and Greenhouse Gas Mitigation Plans** – including sector emissions targets, carbon budget allocations and related M&E requirements, which will be an important site of evidence for assessment of institutional alignment (Results Frame 1). The M&E of DFFE's mandate in relation to the **social and economic aspects of climate change** will be a cornerstone of the JT tracking efforts. This includes the

tracking of implementation strategies, plans and guidelines such as the Actionable Guidelines for the Implementation of Climate Smart Agriculture in South Africa or Strategy toward Gender Mainstreaming in the Environment Sector. These documents amongst others speak to the concern for justice and key at risk sectors that are relevant to the transition. Some of this work overlaps with other sector departments (i.e., Department of Agriculture, Land Reform and Rural Development, and Department of Water and Sanitation) thus the department may act as a central repository of evidence and as such would champion justice definitions and ensure alignment of M&E concepts and methods with the Just Transition MEL framework among these departments.

The DFFE-hosted **South African National Climate Change Information System** (NCCIS) is a web-based, open-source platform for the tracking, analysis and enhancement of South Africa's progress towards a low carbon and climate resilient economy.

The **National Treasury** has been instrumental in deepening work on financing of a sustainable economy (including investment in key infrastructure, as well as subsidy policy review work, etc.) and is policy custodian of key budget, accountability and reporting provisions set out in the Public Finance Management Act and Municipal Finance Management Act. The mandatory reporting criteria for specific grants under the Division of Revenue Act provide an important data source for tracking of the priority indicators and might be 'tweaked' to provide improved data to the system and ensure a feedback loop to improve the JT elements of national infrastructure and operational spend. Treasury is working to 'routinize' the supply of outcome monitoring data in local government, key to service delivery assessment, and is developing a **climate finance tracking system**.

Employment and economic data critical to just transition tracking have recently been boosted through the National Treasury and Human Sciences Research Council's **Spatial Economic Activity Data**: South Africa data development. This provides data on formal employment (disaggregated to the local level, sector and sub-sector, gender and share of youth) and income (level, distribution, Gini coefficient, etc.), compared with national trends, whilst also showing emerging local trends as to which industry sectors are declining or growing and the number of local jobs dependent on each of these industries.

Social safety nets are a noted part of a successful just transition and both the Department of Social Development (SDS), and Department of Cooperative Governance and Traditional Affairs (COGTA) relate. The **Department of Social Development (SDS)**, through the SA Social Security Agency (SASSA) administrates and manages the payment of the plus R200 billion annual social grant payments to some 19 million beneficiaries; and through the National Development Agency (NDA) coordinates grant funds to civil society organisations to meet the development needs of poor communities.

SDS is developing an electronic M&E system which will enable routine collection of service delivery performance data at district and provincial levels. The inaugural (2022) Social Security Review is proposed by the department as a critical source of evidence in public debates on social security issues and specifically directed to enhance broader public participation in these discussions (participatory justice). The SDS leads the National Strategic Plan on Gender Based Violence and Femicide, is exploring Basic Income Support and developing a Framework on Linking Social Protection Beneficiaries to Sustainable Livelihood opportunities. It is also committed to improving NPO registration and

developing state and CSO partnership models – an important implementation model for the just transition.

The **Department of Cooperative Governance and Traditional Affairs** (COGTA) assumes a critical position in providing oversight and guidance to district and local municipalities concerning their contributions to the just transition – see Subnational government below.

Various additional national departments track and monitor sector goals, undertake institutional monitoring and have important sector linkages for detailed studies, making them important contributors of evidence to the Just Transition MEL System.

The **Department of Minerals, Resources and Energy** (DMRE) plays a key role in guiding the energy and power sector's transition and decarbonization. They develop plans like the Integrated Energy[11] and Integrated Resource Plan and publish the Energy Balance[12] annually, showing national energy flows. Their Just Transition Strategy is crucial for evidence generation.

DMRE also monitors areas related to Mine Health and Safety[13], which is important for tracking justice elements related to coal miners and communities. While they lead the transition to a coal-free electricity system, collaboration with other government bodies like the **National Energy Regulator of South Africa (NERSA)** and the Office for the Independent Power Producer Procurement Programme is vital. These agencies provide data on renewable energy development: capacity, costs, finance details, emissions, water savings, and jobs in the sector[14].

Eskom has important data on electricity production, consumption, emissions, and tariff affordability[15]. They also conducted the 2023 South African Renewable Energy Grid Survey with industry associations, showing new power project capacities by type, region, and development stage. This survey was a once-off but could be repeated should there be sufficient demand. With unbundling, the location of data may change into the future.

With regards to economic diversification, **the Department of Trade, Industry and Competition** (DTIC) has made three contributions: The Auto Green Paper on the Advancement of New Energy Vehicles in

---

[11] Related reports may be of value, including, for example an Externalities Costs Report, associated with the IEP.

[12] Annual energy balance data is available up to 2020. While it is an 'annual' balance, the publication is erratic. Historically, they wouldn't publish for a while and then update many years in one go.

[13] Mine Health and Safety Annual Medical Reporting is obligatory report to be submitted by mines on the health of employees. This report allows the DMRE to track commonly found diseases amongst coal miners. This is a useful reporting mechanism as it can be used in tracking improvements in health outcomes of coal miners, which is a necessary restorative justice element.

[14] This would not however include IPPs developed for private power off-take via "wheeling agreements".

[15] The Eskom open data portal houses numerous electricity supply metrics including demand vs. generation (MW) by plant type, installed renewable capacity, Planned Capability Loss Factor, Unplanned Capacity Loss Factor, Energy Availability Factor, among others. Data is hourly.

South Africa, South Africa's Automotive Industry Master Plan to 2035 and The Green Hydrogen (GH) Commercialisation Strategy. Monitoring will include the roll-out of electrical vehicle infrastructure, production, and up-take, tracking the progress of investment, production and demand for the fuel cell technology, as well as related employment and training data.

The DTIC also houses **Sector Master Plans**, providing monitoring sites for sectors undergoing economic diversification, innovation, and decarbonization efforts.

The **Department of Labour** mandates **Workplace Skills Plans** from industries, which could offer valuable evidence for monitoring private sector investment in developing transitional skills.

The Small Enterprise Development Agency (SEDA), an agency of the **Department of Small Business Development**, offers non-financial assistance to small enterprises and cooperatives. Through its widespread network across the country, SEDA produces reports, reviews, and research publications containing data on the total number of enterprises based on size, and gender-disaggregated numbers receiving training and financing support.

The **Department of Transport** (DoT) has a focus on the transition of the automotive industry as outlined in their Green Transport Strategy for South Africa: (2018-2050). The DoT collaborates closely with the DTIC to monitor and evaluate the transitions within the automotive industry, ensuring effective coordination between the transport and industrial sectors.

The **Department of Higher Education and Training** plays a crucial role in economic diversification by shaping the curricula of higher education and TVET colleges to match the skills needed in emerging industries. The department's Sector Training and Education Authorities (SETAs) are aligned with major economic sectors and mandated to create sector skills plans. These plans include the development and execution of learning programs in line with the National Skills Development Strategy.

Department of Tourism has established the South African Tourism Climate Change Communication Strategy (SATCCCS: 2021) in response to South Africa's National Climate Response Policy. This aims to guide the sector's mitigation and adaptation responses through awareness, education, and training.

Department of Agriculture, Land Reform and Rural Development (DALRRD) is responsible for sector adaptation strategies and greenhouse gas mitigation plans. This sector has a particular resonance in relation to the distributive and restorative justice principles of the JT MEL Framework. Vulnerable groups like farm workers and small farmers are deeply affected by climate variability, leading to job and food insecurity. Land reform is also crucial for restorative justice, as land can serve as an equity contribution for affected communities in renewable and/or livelihood projects.

DALRRD provides annual agricultural performance statistics and information on land redistribution. Additionally, the AgriSETAs' annual reports offer data on training numbers, cooperative funding, and land beneficiaries. DALRRD's National Rural Youth Service Corps focuses on developing rural youth skills and enhancing employment opportunities.

The energy transition offers an opportunity for improved water quality and availability, but climate change also brings threats like water scarcity and flooding, especially affecting agriculture and social

safety nets. The **Department of Water and Sanitation** is tasked with monitoring the country's water resources and systems, ensuring equitable access and sustainable management aligned with Goal 6 of the Sustainable Development Goals. The National Water and Sanitation Master Plan (NWSMP) outlines the department's vision to meet these goals and emphasizes the importance of a monitoring and evaluation system to track progress on the NWSMP.

Innovation is a critical enabler of economic diversification as well as the adaptive capacity of the country, and **the Department of Science and Innovation** (DSI) offers an opportunity to bolster the M&E efforts in the system. Illustrative is the DSI's 2021 Hydrogen Society Roadmap for South Africa, in support of the DTIC Hydrogen Commercialisation Strategy. Through this Roadmap DSI has assembled a range of sector experts from the private to public sector to contribute to a policy vision for the use of Hydrogen as an energy source. This experience convening various parties and drawing on research outside of government is a helpful contribution to the MEL system. Further, their research-orientation offers potential to engage in planned deep studies based on their Just Transition Related Policies such as The Green Hydrogen Technical Vocational Education and Training Ecosystem Just Transition Strategic Framework.

The DSI leads the Risk and Vulnerability Atlas publication. This is key to climate 'hotspot' identification. It also leads the **SA Population Research Infrastructure Network** - a partnership between public and academic institutions, housed within the Medical Research Council, to produce high quality, research through longitudinal surveillance, integrating Statistics South Africa, civil registration systems, health facility data, labour and education outcomes at dedicated sites. This offers an opportunity for the inclusion of just transition priority affected communities or locations for ongoing monitoring. Key data includes relocation, education, health status, labour status, household asset status.

The **Department of Health** will have data on access to health services in affected areas; It also houses the National institute for Communicable Diseases which undertakes weekly respiratory pathogens surveillance – an important monitor of air quality and health in coal mining areas. The **DMRE Mine and Health Safety inspectoral** provides data on occupational health and safety, disaggregated to mine site.

Entities in the Presidency

As a repository of many of the national data sets, **Statistics South Africa** (Stats SA) will be a primary source of data for tracking of the JT priority indicators. Reporting to the Minister in the Presidency, the mission of Stats SA is to lead and partner in statistical production systems for evidence-based decisions. Stats SA's wealth of data includes (but is not limited to): the economy (Gross Domestic Product, Gini coefficient, quarterly employment and labour force surveys), sector data (power sector, automotive industry, etc.), household and community well-being and service delivery (Household surveys), crime and violence – including gender-based violence (South African Police Service monitoring, disaggregated to station level) and marginalised groups. Data is intended to be gender and location disaggregated and routinely collected, but it is varying in quality, time spans and levels of disaggregation.

The Presidential Climate Commission (PCC) hosts the JT framework. As an independent, statutory, multi-stakeholder body established to enhance just transition through 'all of society' participation and dialogue, is an important evidence user and stakeholder in the MEL system in support of ensuring stakeholder access to robust evidence for monitoring progress and holding social partners accountable in the just transition. The PCC's just transition tracking will complement and interact with other monitoring under way in relation to Adaptation and Climate finance. The PCC M&E work is overseen by the M&E Commissioner Working Group. Its role going forward is discussed further under "What will the PCC do?", below.

The JET Investment Plan was endorsed by Cabinet in 2022 and the **JET Investment Plan Project Management Unit (PMU)** established in the Presidency to take forward the Plan. Its role is like a delivery unit, helping to unblock and unleash the JET, and speed investment in both energy-related and social justice outcomes. The initial phase involved securing funding commitments, developing theories of change and plans around the initial six portfolios of the JET (electricity, NEVs, green hydrogen, municipalities, skills, Mpumalanga just transition) and identifying investment needs. The PMU is actively involved in the entire life cycle of interventions, tracking implementation and progress, and generating comprehensive monitoring reports. The PMU's MEL plan and activities are aligned with this Just Transition MEL framework in terms of a harmonised theory of change, types of MEL to be conducted and sources for this, and principles which will be applied.

A significant aspect of its role involves robust evaluation and a continuous learning process from implementation experiences, stimulating evaluation demand for flagship energy, mitigation and social justice initiatives. This includes developing a Learning and Evaluation Plan for the JET, supporting rapid responsive as well as more in-depth rigorous evaluation activities to ensure appropriate implementation of the JET and its contribution to the wider Just Transition Framework. By evaluating and learning from project implementation, the PMU will become a source of valuable insight, facilitating an understanding of best practices and areas for improvement and thus is a crucial player in the Platform for learning. The PMU's requirement for these evaluations will also generate greater exposure to evaluations, which may strengthen an appreciation and demand for them across departments.

The PMU also collates information of all the investment monies in relation to the energy transition which is in the public domain. The recent media flurry around this was illustrative of the role of the media and the functioning of a 'socially owned' MEL system.

Subnational Government

Provincial Governments, through the Office of the Premier, play a crucial role in, driving transversal provincial policy, planning, M&E and will be influential in alignment of the Just Transition MEL principles and approaches with provincial medium-term plans and strategies, reporting and evaluations. The Climate Change Bill requires that the Intergovernmental Forum in the premier's office also serve as a Provincial Forum on Climate Change. These forums must coordinate climate change response actions and report on this to the President's Coordinating Council. These reports can be leveraged to obtain province-specific evidence from tracking, evaluations and other studies.

There is a vast expanse of potential data points in the **local government** sphere, which would be valuable for understanding the Just Transition. The Climate Change Bill's provisions for (parallel to provincial counterparts) Municipal Forums on Climate Change and requires Climate Change Needs Assessments and Response Implementation Plans at all District and Metro Municipalities. This system should be engaged for just transition tracking orientation.

Much local level service delivery data will be most readily obtained through the relevant national departments, that consolidate service delivery information. For example, the National Treasury Municipal Finance Management Act Circular 88 requires municipalities to report on indicators covering: energy and electricity; environment and waste; financial management, fire and disaster; governance; housing and community facilities; local economic development; transport and roads; water and sanitation. COGTA's Local Economic Development (LED) Fund reports should contain data on LED initiatives and related spending.

South Africa's larger metros are signatories of global city climate movements and have reporting commitments here. These cities are developing climate tracking systems that will provide evidence into the MEL system – decentralised M&E. This monitoring work is underway in the City of Johannesburg and City of Cape Town.

Social Partners

The South African **Development Finance Institutions** (DFIs) are aware of the role they have in the financing of the just transition. The DFI Round Table on Just Transition Finance hopes to clarify this role by establishing the DFI Just Transition Task Team. It is clear through the creation of such a task team, that DFIs can be credible contributors to the MEL framework and link financing to M&E. This may occur in the form of Institutional monitoring & reporting were they periodically monitor trends and outcomes in the realm of development finance or may be in the form of decentralised M&E as they are essential to the execution of the Just Transition. Along with the JET-IP PMU Funding registry (mentioned above), the non-profit organisation GreenCape's Finance Databases host green industrial financing and economic data that contributes to further investment transparency.

The climate crisis has been the impetus for the creation (or re-directing of focus) of various **research institutions**. Climate studies focus on climate systems, renewable energy, indigenous knowledge systems for sustainable alternatives, but also on the social and economic impacts of transition. These are important sites of deep studies, and capacity building and should be a major national evidence leader and user, warranting further engagement. A few examples in relation to current priority areas include:

- The University of the Free State's Centre for Development Support has undertaken numerous studies on mine closure, including studies on women and mine closure within the Free State goldfields and extending to mines and housing directions in relation to local government service crisis in Mpumalanga (Cloete & Marais, 2021) (Nel, 2023).

- The South African Labour Development Research Unit (SALDRU) of the University of Cape Town offers in-depth, evidence-based labour analysis.

- Trade and Industrial Policy Strategies' (TIPS) Just Transition knowledge portal includes a national employment vulnerability assessment, alongside JT information summaries for stakeholders.

South African **Labour Unions** have already established their role in the Just Transition and their statements on placing workers and society at the centre have been formative to the MEL Framework[16]. Their role in the MEL system may entail the ad hoc studies outlined above, but they also contribute crucial perspectives to the Platform for Learning that may guide the content and trajectory of the other forms of monitoring, evaluation and reporting in the MEL system. They are key M&E stakeholders, contributors and users of the growing evidence base, particularly as it relates to how the justice principles are operationalised.

Business and Industry bodies track trends and statistics that can help ascertain the success of protecting workers' livelihoods and progress in meeting decarbonisation and other environmental targets through environmental, social and governance reporting (the disclosure of environmental, social and corporate governance data). The South Africa PV Industry Association, for example, recently commissioned a study on the quantum and location of distributed or embedded PV generation across the country. The Energy Council of South Africa serves to provide a unified voice for the energy sector – representing both public and private sector entities. It has a focus on strategy development and modelling and monitoring its Roadmap for near term energy sector transition will offer important evidence into the just transition MEL system. The Johannesburg Stock Exchange (JSE) has recently published climate and sustainability indicators to be adopted in their Listed Company Reports. Some South African companies also report to the Carbon Disclosure Project (CDP), widely recognized as the gold standard of corporate environmental transparency.

The media is already playing an important role shaping society's awareness of and engagement with Just Transition issues. As envisioned in the Just Transition Framework Action Plan, the media has a role to take evidence and develop understanding about the Just Transition into the public domain and mobilise working people and their communities for the just transition.

An active and engaged **broader civil society**, plays a crucial role in ensuring accountability in the implementation of the just transition. This includes various entities such as non-government organisations, civic associations, advocacy groups, and others that actively conduct on-the-ground monitoring, assessments, social audits, and independent evaluations. These organized groupings become structured proxies for representing wider "community" perspectives on the just transition, offering valuable insights into its effectiveness and the realization of justice. Beyond holding the government and industry accountable, civil society entities have the potential to significantly contribute to the learning element of the MEL system.

---

[16] In 2022, the Congress of South African Trade Unions produced The Just Transition Blueprint for Workers as a declaration of how the union sees their workers and society at the centre of just transition, and the National Union of Mineworkers has issued their statements asserting their perspective on the just transition.

Stakeholders include environmental non-government organisations such as GroundWork, with its active links to community-based organisations in many priority areas and alternative research organisations, such the Alternative Information and Dissemination Centre, which offers critical research capacity into the space. There are many local-level NGOs and CBOs with contributions to make to the MEL system, such as the Life After Coal campaign and related Community Action Group, whose community-based JT M&E research is outlined in this report (Case Study Box 3). Established civil society networks can advise those planning for MEL in specific locations or sectors, to identify credible organisations to consult or partner with. In line with the framework principles of the framework, asymmetry of access to participation in the MEL system (as generators and users of evidence) should be addressed (see Section 4, Operationalising the framework).

Local and global 'think-tanks' and benchmarking or 'watch dog' organisations are increasingly offering data into the climate space, including drawing on big data, such as Google Environmental Insights Explorer. Use of satellite imagery and AI is also boosting surveillance of small scale distributed solar PV installations around the country. Use of global benchmark data does require drilling down into the meta data being utilised – as this may be simply drawing on the primary data sources outlined above.

The Gauteng Urban Observatory's Quality of Life survey offers insight into perspectives on various elements of transition and the justices at a metro level; Afrobarometer, a pan-African, nonpartisan survey research network, has undertaken surveys that include the South Africa Climate Change Country Card (2021 and 2023), which interviewed 1580 adults on their perspective of climate change in South Africa. Corruption Watch and the Global Initiative against Transnational Organised Crime cover corruption reports and community-based assassinations. Corruption Watch provides an annual benchmarking on corruption.

Several global sites offer insight into business engagement in just transition, such as the Climate Policy Engagement, by Influence Map, which analysed the policy engagement of 16 major companies and 12 industry associations, including Eskom, Sasol, Minerals Council South Africa, and Business Unity South Africa; World Benchmarking Alliance's Just Transition Assessment covers 180 companies globally (including South African) across the 3 critical energy transition sectors of oil and gas, power and automotive.

Box 5: Gender-focussed, community-led transition research - Southern African Resource Watch

Several watchdog groups have emerged in response to environmental, climate justice or human rights-based issues and can offer value into the just transition tracking space. Southern Africa Resource Watch has engaged in gender focussed, community-led work exploring transition dynamics in the town of Caroline, Mpumalanga. The work commissioned 8 women from Caroline to gather testimony from 185 women from the communities of Silobela, Kromkrans and Onbekend in Carolina, eliciting experience and perspectives relating to local air pollution, health and basic service delivery, competing needs and just transition tensions, etc. Such studies, based on direct testimony

---

Box 5: Gender-focussed, community-led transition research - Southern African Resource Watch
and specific focus on the experience of women, are enormously valuable evidence contributions and procedural justice exercises.

Section 4: Operationalising the Framework

How do we use evidence to improve results? Where are the gaps and how can we better align?

The ecosystem of evidence generation that can potentially inform the JT MEL system is vast. Shaping this into something formative to improved decision-making and policy development will be an iterative process and the outcome of efforts by all stakeholders.

Stakeholders across the system need to be informed of the framework and they need to develop capacity to apply the approaches and participate in the evaluative exercises. Cross-pollination and the two-way flow of evidence, with stakeholders being both generators and users of evidence must be developed through strengthened networks across the system. These efforts must seek to address asymmetry of access to system participation, with a focus on the most marginalised, gender and youth.

Implementation systems must make it possible to change the plan, based on the evidence emerging from the system. Across the system all partners should be encouraged to produce evaluation summaries and policy briefs which highlight key messages in relation to just transition progress. Making key findings and recommendations from evaluations accessible and clear will support the use of the evidence in decision-making and policy adjustments. Policy and implementation cycles must be designed to engage this evidence, building a tight relationship between planning, MEL and course correction.

We need to institutionalise regular, high level progress monitoring and review in the system, but this is not sufficient on its own. Decentralised evaluations will be important to judge aspects of Just Transition progress at multiple levels. If done well and shared appropriately, decentralised evaluations will contribute vast amounts of rich information to our overall picture. However, we will also need planned, deep evaluative studies of the Just Transition specifically.

Ongoing efforts are required to develop outcome data that foregrounds the guiding principles, especially the justice orientation. This includes efforts to develop outcome data at a disaggregated level if we are to be able to meaningfully monitor the justice elements of the transition efforts. This includes subnational disaggregation as well as gender and youth-based disaggregation (and/or other specified vulnerable groups). The recently developed SEAD-SA (Spatial Economic Activity Data: South Africa)[17] illustrates how this can be achieved.

The flow of evidence arising from evaluation and deep studies is important to ensure transparency and accountability. This requires an open access site and developing a culture of sharing information and

---

[17] This has developed by the National Treasury-City Support Program with the HSRC, based on data from StatsSA and SARS.

encouraging scrutiny and feedback from stakeholders to ensure credibility and trustworthiness. The gaps in the system and roles to take forward the learning and policy adjustment are addressed below.

What will the PCC do?

PCC M&E Working Group

The PCC is the custodian of the Just Transition Framework and, by extension, of the related efforts to track progress. The PCC has convened an M&E Working Group. This group comprises PCC commissioners, government representatives, civil society representatives, community members, academia and other experts in the MEL field. It provides a steering and oversight role to the PCC's M&E function and work, and approves annual workplans etc. Evidence generated by the PCC's M&E Working Group will be tabled with the President.

Custodian of the JT MEL Framework

As custodian of this JT MEL Framework, the PPC will:

- Develop awareness of the MEL Framework across all stakeholders.

- Continue engaging with the public sector to influence the direction of state evaluation processes towards inclusion of the justice principles.

- Continue to develop this framework through:

  o 'Road testing' an application of the approach at a sector or regional level ("decentralised evaluation").

  o Developing, as required, practical guidance notes that may naturally arise from this framework.

  o Leading review at periodic intervals of what is intended to be an iterative framework.

Regular, high level JTF progress review

Regular, high level progress review has begun with the PCC's (biennial) State of Climate Action report. The priority set of **Just Transition Framework indicators** will also be tracked in a format that is to be confirmed.

Responsive M&E exercises

The PCC will undertake qualitative, ad hoc ("reactive") strategic analyses, as the need arises in relation to issues of national importance. These are "deeper dive" studies and offer an opportunity to 'road test' the JT MEL Framework through the application of the principles and approaches, the justice lenses and priority indicators and how evidence is then brought into the public domain.

Convene a learning network and direct evidence to inform decision making and policy

The PCC's M&E Commissioner's Working Group provides an important platform through which evidence can be channeled. This platform already offers the 'learning network' space, where policy

makers and decision-makers and stakeholders can engage in the evaluation process and with the findings.

Such a learning network will be enhanced through consideration of broader dissemination of tracking reports (outreach workshops, use of media) and capacity development of stakeholders around core concepts related to JT evaluation. Data visualization techniques such as charts, graphs and infographics to illustrate key findings from evaluations help to convey complex findings from evaluations to decision makers towards improving outcomes.

What could other stakeholders do?

The DPME and DFFE are positioned to guide the public sector M&E frameworks in support of the principles and objectives of the JT MEL Framework and making relevant data available to the system – and establishing networks for this. For example, National Treasury is developing a climate finance tracking system; it is also routinizing the supply of outcome monitoring data in local government, both of which interventions greatly enhance the ability of the system to track just transition progress.

The South African National Climate Change Information System (NCCIS) is a web-based platform hosted by the DFFE for the tracking, analysis and enhancement of South Africa's progress towards a low carbon and climate resilient economy. The NCCIS may offer an open access information portal for the repository of evidence.

More generally, those who work with Just Transition related evidence should seek to apply the Just Transition MEL framework – or elements thereof. Social partners should continue with their efforts to integrate and strengthen the coordination of their MEL practices as far as possible and appropriate, including sourcing or identifying new just transition evidence in the research sector and standardising how companies report on just transition related contributions and risks.

It will be important for the JT MEL Framework to be applied to each of the four priority economic sectors - energy, automotive, tourism and agriculture. The Just Transition overall will benefit from sector-specific theories of change and clarity on how evidence will be generated and used to understand sector-specific progress.

Furthermore, all those with a stake in strengthening the MEL system should engage with the just transition learning network and emerging platforms and participate in building on this framework. Evidence can be shared for peer/stakeholder review, disseminated to targeted audiences through workshops, seminars and/or conferences to build understanding and be used for advocacy.

In Conclusion

Addressing the climate crisis and its transition demands collective action at an unprecedented rate and magnitude from all societal stakeholders. Achieving a just resolution to this crisis necessitates fair distribution of risks and opportunities, rectifying historical injustices, and offering support to the most vulnerable segments of our society.

Building essential trust among stakeholders hinges on robust evidence demonstrating their commitment. Likewise, as we navigate uncharted territory, making necessary adjustments relies on a clear understanding of whether we are attaining the required pace and scale for a fair transition.

The JT MEL Framework approach orientates the evaluative system to contribute to a more comprehensive understanding of the just transition, allowing for the adaptation of policies and programs to meet the diverse needs of stakeholders, while upholding procedural, distributive, and restorative justice at all scales.

The Framework anticipates harnessing the rich ecosystem of evidence and extensive of socio-economic data and research in South Africa. By embracing a wide spectrum of evaluation efforts, across levels and geographies, we can gain a multi-dimensional view of the transition's progress.

As stakeholders implement the Framework and collaborate for standardization, evidence exchange, and learning, they enhance the JT MEL ecosystem. This integration and coherence promote mature MEL practices, leading to better Just Transition outcomes not only for South Africa but also globally.

References

AfrEA. (2021). *The African Evaluation Principles - 2021 version*.

Baloyi, B., Lehmann-Grube, K., Radebe, H., & Upadhyaya, P. (2022). *Transformative Resilience as the Centrepiece of a Just Transition* (PCC Expert Perspectives: Supporting a Just and Climate Resilient Transition in South Africa).

Brooks, N., & Fisher, S. (2014). *Tracking Adaptation and Measuring Development: a step-by-step guide*.

Cloete, J., & Marais, L. (2021). Mine housing in the South African coalfields: the unforeseen consequences of post-apartheid policy. *Housing Studies*, *36*(9), 1388–1406. https://doi.org/10.1080/02673037.2020.1769038.

DFFE. (2023). Climate Change Bill (As amended by the Portfolio Committee on Forestry, Fisheries and the Environment (National Assembly)), https://static.pmg.org.za/1/B9B-2022_Climate_Change.pdf.

DHET. (2022). *Statistics on Post-School Education and Training in South Africa 2020*.

DPME. (2019). DPME National Evaluation Policy Guideline.

DPME & SAMEA. (2022a). Evaluation guideline 2.2.24: Integrating a transformative equity criterion into evaluations for promoting transformative systemic change, https://oldwww.samea.org.za/resource?slug=resource-dpme-just-transition-guidelines.

DPME & SAMEA. (2022b). *DPME Evaluation Guideline 2.2.25* Guidelines for Applying the climate and ecosystems health criterion in the commissioning, design and implementation of evaluations. https://oldwww.samea.org.za/resource?slug=resource-sameadpme-just-transition-guidelines.

EDP. (2023). *From ideas and policies to effective action: just transition partnering implementation model.*

Independent Evaluation Group. (2010). *High Impact Evaluations: Exploring the Potential of Real-Time and Prospective Evaluations. Summary of a Workshop*. World Bank, https://ieg.worldbankgroup.org/sites/default/files/Data/reports/realtimeprospectiveevals2011.pdf.

Makgetla, N., Maseko, N., Montmasson-Clair, G., & Patel, M. (2019). *National Employment Vulnerability Assessment: Analysis of potential climate-change related impacts and vulnerable groups*. www.tips.org.za.

Mayne, J. (2008). Contribution analysis: an approach to exploring cause and effect. In *Institutional Learning and Change (ILAC) Brief* (Institutional Learning and Change (ILAC) Brief nr. 16; Institutional Learning and Change (ILAC) Brief). https://doi.org/10.1177/1356389016654584.

National Economic Development and Labour Council (NEDLAC). 2020. *NEDLAC Report on the Climate Change Bill*. Johannesburg. NEDLAC.

Nel, E., Marais, L., & Mqotyana, Z. (2023). *The regional implications of just transition in the world's most coal-dependent economy: The case of Mpumalanga, South Africa*.

NPC. 2019. *Social Partner Dialogue for a Just Transition*. Pretoria: NPC.

PCC. (2022a). *A Framework for a Just Transition in South Africa*.

PCC. (2022b). *Community and Stakeholder Engagement on a Just Transition in South Africa*.

PCC. (2022c). *Supporting a Just and Climate-Resilient Transition in South Africa*.

Systems in Evaluation Topic Interest Group of the American Evaluation Association. (2018). *Principles for Effective Use of Systems Thinking in Evaluation Practice*.