



EUROPEAN CLUSTER  
COLLABORATION PLATFORM

# Country factsheet

South Africa

An initiative of the European Union





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## Introduction



This document presents an overview of the cluster policy in South Africa. Given its importance to contextualise the cluster policies (and related) analysed in the factsheets, a comprehensive outlook of the country in socioeconomic terms can be consulted in the [OECD Economic Survey: South Africa 2020](#).

The “Economic Surveys” present the major challenges faced by the country, evaluates the short-term outlook, and makes specific policy recommendations.

# 01

## National cluster policy, programmes and initiatives



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## 1. National cluster policy, programmes and initiatives

Policy type:	National cluster policy	National cluster policy
Policy name:	<u>Competitiveness Improvement Programme (CIP)</u>	<u>Special Economic Zone (SEZ) Programme</u>
<p><b>POLICY OBJECTIVES</b></p> 	<p><b>Strengthening cooperation between companies or industry and RTDI actors</b></p> <p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Supporting internationalisation activities</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Strengthening the network of cluster organisations/cross-clustering</b></p> <p><b>Cluster analysis and support for policymaking</b></p> <p><b>Connect to global supply chains</b></p>	<p><b>Increasing competitiveness and boosting scale up of SMEs</b></p> <p><b>Supporting internationalisation activities</b></p> <p><b>Fostering R&amp;D activities, technology development and implementation</b></p> <p><b>Fostering innovation and strengthening innovation ecosystems</b></p> <p><b>Promoting entrepreneurship, start-ups and spin-offs</b></p> <p><b>Promoting social and sustainable economy and other solidarity-based initiatives</b></p> <p><b>Promoting employment and upgrading skills and competences</b></p> <p><b>Connect to global supply chains</b></p>
	<p>The Competitiveness Improvement Programme (CIP) is derived from the overarching Clothing and Textiles Competitiveness Programme (CTCP) that is implemented by the Department of Trade and Industry. The CTCP aims at structurally changing the clothing, textiles, footwear, leather, and leather goods manufacturing industries in South Africa by providing funding support for the sector to invest in competitiveness improvement interventions. The goal of the policy is to increase productivity levels through industrial and/or process engineering and management activities. Improvement interventions are based on a benchmarking exercise. For this benchmarking activity, the processes and performance of clusters and cluster members are compared to 'best practices' locally and internationally.</p>	<p>The Special Economic Zone (SEZ) programme aims to facilitate the development of industrial agglomerations that attract investment and promote business capability development through the formation of clusters. Specifically, the policy aims to enhance the export-oriented manufacturing industry in South Africa. Central tools to achieve this are incentive packages and business support services. Access to the SEZ benefits is granted to start-ups and existing businesses focusing on manufacturing, designated internationally traded services, and trading/warehousing activities. The SEZ programme therefore provides services to companies engaging primarily in export activities.</p>



	<p>The CIP promotes three different cluster compositions, which are the 1) 'ordinary cluster' (group of at least five manufacturing companies or associated organisations), the 2) 'national cluster' (a sector or sub-sector-side development initiative coordinated by a national management structure involving skills development, technology R&amp;D and incubation of SMEs, and shared resources facilities), and the 3) 'subnational cluster' (formed with or after a national cluster to implement and support the strategic objectives and activities of the national cluster).</p> <p>Major clusters created through the CIP include the Cape Clothing and Textile Cluster (CCTC), the KwaZulu-Natal Clothing and Textile Cluster (KZNCTC), and the Southern African Sustainable Textile and Apparel Cluster (SASTAC) with links to Cotton South Africa (Cotton SA).</p>	
<p><b>POLICY FOCUS</b></p> 	<p><b>Sectoral</b></p> <p>This policy targets the clothing, textiles, footwear, leather, and leather goods manufacturing industries.</p>	<p><b>Sectoral</b></p> <p>The main policy focus is export-oriented industries and manufacturing, covering a variety of different sectors such as automobiles, agro-processing, chemicals, general manufacturing, business process outsourcing, and energy.</p>
<p><b>RESPONSIBLE AUTHORITIES</b></p> 	<p><b>Both drafting and implementation</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p> <p>The South African Department of Trade and Industry (DTI) is the main authority responsible for the drafting, implementation, and funding of the CIP.</p>	<p><b>Both drafting and implementation</b></p> <p><b>Provides funding</b></p> <p><b>Oversees the implementation</b></p> <p>The South African Department of Trade and Industry (DTI) is the main authority responsible for the drafting, implementation, and funding of the SEZ programme.</p>
<p><b>BENEFICIARIES</b></p> 	<p><b>SMEs</b></p> <p><b>Research organisations</b></p> <p><b>Large firms</b></p> <p><b>General population</b></p>	<p><b>SMEs</b></p> <p><b>Start-ups</b></p> <p><b>Large firms</b></p> <p><b>General population</b></p> <p><b>Others: Foreign investors</b></p>



		The CIP mainly focuses on companies of varying sizes. Additionally, the policy also includes R&D entities. Other beneficiaries are seekers of employment, as the policy aims at increasing employment.	The main beneficiaries of the SEZ policy are companies of all sizes and the general population since the policy focuses on promoting employment. Furthermore, the policy also aims to attract foreign investors to accelerate the growth of the South African industry.
<b>INSTRUMENTS</b> 	Financial	<b>Funding collaboration initiatives</b> <b>Support to R&amp;D projects, SMEs becoming cluster members, etc.</b>	<b>Subsidies to hire personnel</b> <b>Subsidies for cluster infrastructure (e.g. offices, equipment)</b> <b>Others: Fostering foreign investment (compensated for the qualifying costs of moving new machinery and equipment [excluding vehicles] from abroad); tax incentives; rebates; customs controlled areas; donation of land or provision of land at a discounted rate by municipalities for the establishment of SEZs; provision of utilities (water and electricity), sometimes at preferential rates, negotiated on a case-by-case basis</b>
	Technical assistance	<b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</b> <b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b> <b>Support for networking and partnership building (at national and/or international level)</b> <b>Marketing activities: advertising, communication, events, fairs, and so on</b>	<b>Infrastructure: coworking spaces, offices, incubation and accelerator spaces, research centres, technology parks etc.</b> <b>Support for hard skill development: knowledge transfer, intellectual property, entrepreneurship, export advice, market intelligence</b> <b>Support for soft skills development: coaching, management training, upskilling/reskilling</b> <b>Marketing activities: advertising, communication, events, fairs, and so on</b> <b>Others: Specialised waste services; infrastructure such as construction, maintenance, and upgrading access to roads for the SEZs</b>
	Explanation	The CIP aims to increase its competitiveness in cost, quality, reliability, adaptability, and the capability to innovate through cluster project funding and technical assistance. This can include software investments, consulting, skills training, and joint research activities. Consulting services try to enhance the management systems, management control principles, performance, quality management, and preventative management of companies/cluster members to ensure productivity. Following the rationale of the benchmarking component of the CIP, this policy also supports best practice networking that allows participants to engage with best practice peers, with a view to increasing their own capabilities.	The SEZ policy aims to offer marketing support, capacity development and skills development strategies, sustainable infrastructure development, integrated logistics systems, technology, research, and developmental measures to promote sustainable technological innovation and increased productivity. Another central aim of the policy is to foster the creation of jobs through national and provincial grants that can be accessed at the same time.



<b>HISTORY</b> 	Period	Unlimited	Unlimited
	Ending year (for policies with limited period)	-	-
	Starting year	2009	2012
	Explanation	<p>Starting year: As early as 2009</p> <p>The starting year of the CIP is not specified in the sources, but it is indicated that the overarching CTCP has provided funding since 2009.</p>	<p>Government sources suggest that the SEZ policy was launched around 2012 after the review and overhaul of the preceding Industrial Development Zones (IDZ) programme. The SEZ cluster policy also emerged out of new developments in national economic strategies such as the National Industrial Policy Framework and the New Growth Path as well as developments in the global economic environment such as the formation of BRICS, an economic association of Brazil, Russia, India, China and South Africa.</p> <p>As part of the IDZ programme, several major industrial complexes were set up and later continued and further expanded under the SEZ policy. These zones are the Coega SEZ in the Nelson Mandela Bay Municipality, the East London IDZ in the Buffalo City Municipality, the Richards Bay IDZ in the uMhlathuze Local Municipality and the uThungulu District Municipality, and the Dube TradePort IDZ in KwaZulu-Natal Province.</p>
<b>BUDGET</b> 	Overall	<p>Overall maximum support for ordinary cluster projects: EUR 1.3 m</p> <p>Funding for national clusters and their supporting subnational clusters: initial investment grant of 100% of the approved expenditure of the first year; cost-sharing of 95% from the CIP in the second year; 90% from the CIP in the third year; 80% from the CIP in the fourth year; 70% from the CIP in the fifth year.</p>	<p>By 2012/2013, the South African government had invested approximately EUR 435 million in the Coega, East London, and Richards Bay development zones (ECB conversion rate from ZAR to EUR from July 24, 2020).</p>
	Annual	<p>Total financial commitment in 2017: EUR 18.5 million</p> <p>Available funds in 2017: EUR 7.8 million</p> <p>Available funds in 2016: EUR 10.3 million (ECB ZAR-EUR conversion rate of July 27, 2020)</p>	<p>The budget is not publicly available</p>
	Source of funding	<p>The budget is mainly provided by the South African Department of Trade and Industry (DTI). The DTI covers 75% of the project costs of qualifying ordinary clusters. The remaining 25% should be provided by members of these ordinary</p>	<p>South Africa's Department of Trade and Industry (SEZ Fund – Capital Projects), Department of Economic Development Environmental Affairs and Tourism, and</p>



		clusters. National and subnational clusters are funded by the DTI on an annual percentage rate from year 1 to year 5 of the cluster project.	regional authorities such as the Buffalo City Metropolitan Municipality for the East London IDZ.
<p><b>POLICY</b></p> <p><b>EVALUATION</b></p> 	Availability	<b>in-itinere</b>	<b>ex-ante</b>
	Results	<p>According to a review from 2017, the CIP has been successful overall. Cluster members achieved to increase their garment exports directly or through local retailers in the region. These exports were additionally complemented by footwear exports to the Eurozone and other international destinations. The CIP also managed to maintain and create new jobs in the industry. Additionally, major retailers are collaborating more with local manufacturers individually or in clusters.</p> <p>The report also summarises the number of CIP applications in 2017. Of the 61 (2016: 49) projects approved, 39 (2016: 27) were cluster level applications and the remaining 22 (2016: 22) were company-level applications. Evaluators found that the total financial commitment of the DTI exceeded the available funds; however, the source states that the DTI allocated enough funds to cover this shortfall in the 2017/2018 financial year.</p>	<p>According to official sources from 2012, the South African government began to monitor and report on the inputs, outputs, outcomes, and impact of the Industrial Development Zones (IDZ) policy, which preceded the SEZ policy, in 2007. The evaluation of the SEZ programme is the responsibility of the Department of Trade and Industry, provinces, municipalities, developers, and operators. The same source also states that the government aims to report at least annually on the performance of the SEZ programme.</p> <p>The findings of the assessment from 2013 show that South Africa's industrial zones following the IDZ policy did not reach financial sustainability until 2013. Therefore, the SEZ policy replaced the IDZ policy based on the following findings and recommendations: 1) costs and risks must be managed better, 2) any upfront infrastructure expenditure must match business interests better, 3) initial government investment in the SEZs must be minimised, 4) capital and operational costs must remain proportional to the number of tenants in place, 5) excessive supply of industrial land by the government should be avoided, 6) in the new SEZs, operating entities will no longer be permanent and new operating entities will be appointed on a five-year contract, 7) the subsequent evaluation should fine-tune its indicators to include the efficiency and effectiveness of the SEZs.</p>
<p><b>POLICY ALIGNMENT WITH THE</b></p> <p><b>EU PRIORITIES</b></p> 	-	-	-

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## State of play of cluster policy



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## 2. State of play of cluster policy

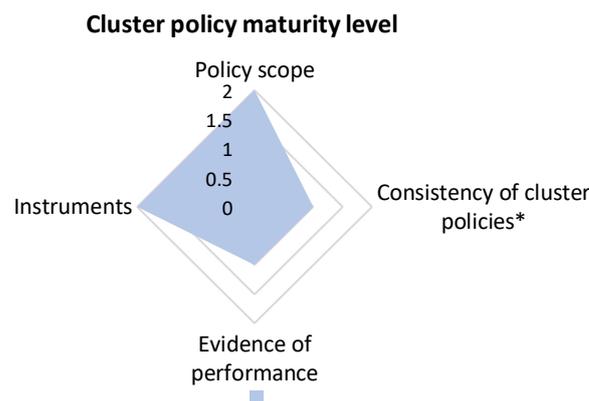
The data below illustrates how the country ranks in terms of maturity of cluster policy. The maturity index is based on a combination of factors presented in Chapter 1 and which are scored based on their existence:

- **Policy scope:** whether the country has a dedicated cluster policy, or cluster creation and/or development is targeted through broader policies (existence of broader policies = 1 point; existence of targeted cluster policies = 2 points)
- **Consistency of cluster policies:** assessment of the duration and experience of the country in doing cluster policies. This dimension assesses only existing cluster policies and not broader policies (no cluster policies available = 0 points; < 10 years of experience or > 10 years (but interrupted) = 1 point; > 10 years (but with clear continuity = 2 points)
- **Evidence of performance:** the existence of monitoring and evaluation mechanisms determines the degree of policy development in the country (no evaluations = 0 points; existence of evaluations of past policies or in-itinere = 0.5 points; existence of ex-ante and/or ex-post evaluations = 0.5 points)
- **Instruments:** whether the policies provide any instruments to support the policy implementation, being these financial and/or technical assistance (1 point for each type of instrument available)

It is important to note that the maturity does not reflect the performance of a country, but only the degree of development of their cluster policy at the moment when the data was collected (2021). The maturity index illustrates how the country scores for each of these four dimensions (policy scope, consistency of cluster policies, evidence of performance and instruments) compared to the maximum score that they can reach.

	South Africa	Maximum score
Policy scope	2	2
Consistency of cluster policies*	1	2
Evidence of performance	1	1
Instruments	2	2

\* This dimension is scored solely if the country has a dedicated cluster policy and it assesses only cluster policies



### State of play of cluster policy in the country

#### Policy evaluation (for terminated policies)

#### Availability of evaluations for terminated policies

A policy evaluation was finalised in 2013, assessing the financial sustainability of the now terminated IDZ policy. This performance and expenditures evaluation measured the cost of attracting investment in the IDZs and compared it with the recorded gains. The IDZ policy was also evaluated by these two key indicators: 1) increased investment



	<p>(number of signed investors, value of the investment, number of new investment agreements, number of investment opportunities) and 2) increased value-added exports (value of exports generated and establishment of new exporters).</p> <p>The results of this assessment showed that by 2012/2013, the South African government had invested approximately EUR 435 million in the Coega, East London, and Richards Bay development zones. The measured private sector investment of EUR 165 million, however, did not match or exceed the amount of government spending in the same three zones in the same time frame. Therefore, the IDZ policy was replaced by the SEZ policy to remedy its shortcomings.</p> <p>Another evaluation was carried out on the Cluster Development Programme (CDP). This policy specifically focused on the promotion of industrialisation, sustainable economic growth, and job creation in South Africa through cluster development and industrial parks. The policy was a suspended in 2018, since it was launched as a pilot project that had aimed to provide grants to a limited number of clusters. Notably, the policy prioritised the growth of black-owned entities within selected clusters and the development of industrial parks in areas with high levels of unemployment such as townships and rural areas. Moreover, the policy required the majority of cluster tenants to be involved in manufacturing and supply-based business. A summary report on the Industrial Policy Action Plan (IPAP) published in 2017 for the financial year 2017/2018 to 2019/2020 states that the CDP had approved six cluster initiatives totalling approximately EUR 3 million (ECB ZAR-EUR conversion rate from July 27, 2020) across the country. These clusters mainly engaged in the medical devices sector, composites, non-automotive, advanced manufacturing, pharmaceutical, and creative industries.</p> <p>The DTI commissioned an impact assessment after the termination of the Cluster Development Programme, expecting recommendations from the evaluation to be delivered in the 2018/2019 financial year. This policy evaluation, however, is not publicly available.</p>
<p><b>Policy approach in the country</b></p>	<p><b>Cluster approach used directly by national/regional development agencies</b></p> <p><b>Specific policies to support cooperation projects</b></p>
<p><b>Continuity</b></p>	<p>South Africa's Department of Trade and Industry recognised the importance of cluster development already in the 1990s, making efforts to analyse sectors and interact with relevant stakeholders such as industry associations. The first major policies including a cluster component were the Industrial Development Zone (IDZ) Programme, which was established in 2000, and the Industrial Policy Action Plan (IPAP), which was first launched in 2008/2009. Generally, these policies focused primarily on decreasing unemployment rates, fostering skills development, and ultimately increasing the global competitiveness of South Africa's industries, with an emphasis on manufacturing. Notably, these were industrial policies rather than cluster policies per se.</p> <p>Policies specifically targeting and promoting cluster activity were launched as early as 2009 with the onset of the Clothing and Textiles Competitiveness Programme (CTCP), which included the national cluster-focused Competitiveness Improvement Programme (CIP). The CIP has fostered the growth of several ordinary, national, and subnational clusters ever since, with a view to potentially continuing the cluster approach in the textile industry in the future.</p> <p>The Special Economic Zone (SEZ) policy was developed in 2012, replacing the Industrial Development Zone programme after a policy review to improve South Africa's economic development activities and further endorse cluster development. In order to achieve this, the SEZ policy utilises a wider range of policy instruments and incentives.</p> <p>South Africa had also set up a Cluster Development Programme (CDP). This cluster policy, however, was terminated after the conclusion of its pilot phase in 2018. There is no publicly available information on why the policy was terminated.</p>
<p><b>Consistency</b></p>	<p><b>&gt; 10 years (but interrupted)</b></p> <p>South Africa has developed a range of different cluster policies and industrial policies integrating a cluster component since the year 2000. Some policies have been revised and improved, such as the IDZ Programme, while some have been terminated after a few years, such as the CDP. Despite these inconsistencies, South Africa's Department of Trade and Industry has been continuously working on enhancing the industrial development and cluster approach of the country. Based on these findings, it appears that South Africa is likely to continue integrating a cluster approach in its policies. Overall, cluster policies in South Africa have the potential to become more streamlined and link the activities of research institutions and businesses more in the future.</p>

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