



Pretoria, 26 August 2025

The Representative
Clean Value Chains Enterprises

Subject: Business environment study on EU investments in clean value chains in South Africa: Consultation on Trade and Investment Barriers

Dear Enterprise Representative,

During the 8th EU-South Africa summit in March 2025, the EU and South Africa agreed to launch negotiations towards a Clean Trade and Investment Partnership (CTIP) to support the development of strategic cleaner value chains. Accompanying the CTIP announcement was a €4.7 billion Global Gateway Investment Package, with the bulk of the package, €4.4 billion, earmarked for projects supporting South Africa's energy transition.

The Delegation of the European Union to South Africa is seeking to identify barriers to EU trade and investment in clean value chain sectors (Renewable Energy, Clean Technologies, Clean Fuels) to inform CTIP negotiations with South Africa. As part of these efforts, we are conducting a survey to collect information directly from European companies active in South Africa to better understand the barriers and challenges faced by EU private sector investors in South Africa's clean value chains.

This survey is being carried out on behalf of the EU Delegation to South Africa by Particip GmbH, an independent consultancy contracted to support the EU Delegation.

The current survey focuses on three critical sectors:

- Renewable Energy (wind, solar, grid-scale storage)
- Clean Technologies (e.g. cooling equipment, smart grids, energy efficiency)
- Clean Fuels (green/clean hydrogen, ammonia, sustainable aviation fuels (SAF), maritime biofuels)

The survey aims to capture first-hand perspectives from EU investors in South African clean value chains in order to:

- Identify trade and investment barriers that hinder growth and competitiveness
- Assess the impact of these barriers on ongoing and planned investments
- Formulate evidence-based recommendations to inform the EU's dialogue with South African counterparts under the CTIP negotiations.

Your participation is vital to ensure that the EU's engagement reflects the real challenges and opportunities experienced by European companies on the ground and that proposed solutions are grounded in day-to-day business realities.

Who should respond:

EU-affiliated firms active in any of the following value chains:

- Renewable energy: wind, solar PV, storage, grid works, EPC and O&M.
- Clean fuels: green hydrogen and derivatives such as ammonia, e-methanol and SAF, including electrolyzers and balance-of-plant, water treatment, compression, storage, transport and port handling, plus certification and offtake.
- Clean technologies: process electrification and heat pumps, high-efficiency motors and drives, EV charging and fleet solutions, metering and controls, recycling for PV and batteries, testing and certification services.

Why respond:

Your contribution, anonymised and aggregated, will inform EU interests to raise during EU-SA CTIP negotiations. Resolution of these barriers will make it easier for EU enterprises to do business in South Africa.

Time and privacy:

The survey takes 15-20 minutes. Responses will be analysed and reported without attribution and in aggregate form. Data is stored securely on approved systems with restricted access and retained only for a limited period consistent with the General Data Protection Regulation (GDPR) and South Africa's Protection of Personal Information Act (POPIA), then archived under EU records policy.

No firm will be named or quoted without written consent.

Should you want to participate:

Please complete the survey by **1st September 2025** using this link: <https://ee-eu.kobotoolbox.org/x/cuOPbAWr>

We sincerely hope you will contribute to this important exercise. By sharing your experiences, you will directly shape the EU's efforts to improve the enabling environment for sustainable investment and to support the growth of clean value chains in South Africa.

Should you have any questions or require further information, please do not hesitate to contact [Marika Jakas, Head of Trade and Economics Section, Email: Marika.Jakas@eeas.europa.eu] at the EU Delegation, or the Particip survey team at Business-Environment.Survey@particip.com. Both channels operate under the same confidentiality safeguards.

We thank you in advance for your valued contribution and look forward to your participation.

Yours sincerely,

Marika Jakas
[e-signed]