Minister's Briefing on APP-20261031_070216-Meeting Recording

October 31, 2026, 5:02AM

His central message was that the APP must be built from the Industrial Development Strategy (IDS), rather than fitting existing projects and indicators into the strategy after the fact.

1. **Move from alignment to integrated implementation**

Showing that activities broadly align with the IDS is not sufficient. The department must start with its strategic choices, identify the critical implementation pathways, and use these to determine what belongs in departmental APPs and entity corporate plans. He used a travel analogy: different activities may all contribute towards reaching the same destination, but they do not necessarily constitute one coherent strategy.

2. **Define who does what across the portfolio**

Each pathway must specify the contribution of trade negotiations, investment facilitation, industrial financing, incentives, trade measures and relevant entities. It must also identify dependencies on other departments, including electricity-pricing arrangements and financing discussions.

The combined interventions: not separate branch activities—must deliver the intended industrial outcome.

3. **Make sector strategies practical**

Using steel and critical minerals as examples, he called for a clear account of:

- The constraints and opportunities.
- The minerals and downstream industrial capabilities being targeted.
- The markets to be accessed and productive capacity to be rebuilt.
- The financing, locations, incentives and supporting interventions required.
- Responsibility for each part of implementation.

Existing projects should not, on their own, be presented as the department's critical-minerals strategy.

4. **Direct partnerships and funding towards South Africa's objectives**
International funding facilities, trade agreements and investment partnerships must be assessed against South Africa's industrial priorities. The department should articulate the capabilities and investments it wants to secure, rather than merely accommodate projects proposed by partners.

He illustrated this through references to an EU financing facility and discussions with China on microchips and semiconductors.

5. **Model implementation and strengthen indicators**
He acknowledged the importance of economic and statistical modelling, but emphasised the immediate need to institutionalise disciplined strategy implementation. Implementation models should inform APPs, entity plans, resource requirements and interdepartmental dependencies.
He also stressed that indicator quality matters: a process indicator may appear aligned without measuring the outputs or outcomes needed to implement the strategy.

6. **Resolve compliance requirements without compromising the substance**
He asked for advice on the submission process and indicated willingness to submit with an explanatory rider, engage DPME and the relevant Minister, and secure dedicated time for the work. Deadline pressure should not substitute for getting the strategic approach right.

Bottom line: He expected indicators that implement strategy—not current projects repackaged as strategic alignment.

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