
TERMS OF REFERENCE

Project Title: *An Analysis of Structures Promoting Participation in the Development of a Just Transition in South Africa: Enhancing Consistency and Effectiveness for Workers and Communities*

1. INTRODUCTION

The concept of a **Just Transition** has become central to South Africa’s policy agenda, particularly in the context of climate change, industrial restructuring, and shifting toward sustainable development. However, the success of a Just Transition relies not only on the strategies developed at the national and provincial levels, but on the active and meaningful participation of workers, their communities, and civil society organisations. This project will explore the structures, mechanisms, and opportunities available to promote such participation, with a focus on how these processes can be strengthened to benefit the most affected groups, particularly workers¹ and communities.

This analysis will map the emerging engagement processes at various levels of governance, including national, provincial, local, and industry levels, with the goal of identifying key areas where improvements could enhance the representation and involvement of workers and communities in the Just Transition process. The findings will contribute to policy recommendations that will make engagement processes more consistent, inclusive, and impactful.

2. PURPOSE OF THE STUDY

The problem being addressed is the under representation, inadequate engagement, and therefore, limited effectiveness of current engagement structures in just transition policy processes in South Africa, that negatively effects workers and communities. This process aims to shift towards a low-carbon economy, but the mechanisms that promote participation are not

¹ By “workers” we mean the working class as a whole in South Africa, including those unionised and not unionised, employed and unemployed.

sufficiently inclusive or effective, particularly for workers and communities most affected by climate change and industrial restructuring. The groups most affected include workers in carbon-intensive industries (such as coal mining and energy), local communities, and marginalized groups who are likely to experience economic displacement due to this transition. These groups struggle to secure alternative livelihoods, access to social protections, and equitable opportunities for involvement in the decision-making processes that directly affect their future.

This research will help by analysing current participation structures, identifying the gaps in engagement, and offering recommendations for reform. By enhancing the representation of these groups and strengthening the mechanisms through which they can participate in the Just Transition, the research will contribute to more effective and inclusive policy outcomes that benefit workers and communities.

3. BACKGROUND AND PROBLEM STATEMENT

South Africa faces multiple challenges related to environmental sustainability, job losses due to the decline of carbon-intensive industries, and a need for social justice in the face of climate change. The transition to a low-carbon economy, while necessary for long-term sustainability, presents a risk of economic displacement for workers in key sectors like coal mining, energy, and manufacturing

Several mechanisms exist at the national, provincial, municipal, and industry levels to promote participation in the Just Transition process. These include the Presidential Climate Change Commission (PCCC), national climate change policy discussions, industry-specific forums, and local engagements. However, there is a noticeable lack of co-ordination between these processes, and their effectiveness in engaging marginalized groups, especially workers and local communities, remains questionable.

The central argument is that the current structures for promoting participation in South Africa's Just Transition are largely insufficient in empowering workers and communities. Government representatives often have weak and fragmented mandates with long delays in obtaining responses, and business representatives often only represent established businesses, with interest in existing industries rather than those that would benefit from a just energy transition. The research will help evaluate whether these structures are designed and implemented in a way

that supports the inclusion of workers and communities in decision-making and whether they enable meaningful participation in a process of just and equitable transformation.

This research will identify gaps in these processes and recommend structural reforms to address these challenges. Additionally, this research will propose alternative or additional mechanisms of engagement, should they be useful.

4. SCOPE OF WORK

The scope of work for this research includes the following tasks:

- **Mapping of engagement structures:** Identify and describe national, provincial, municipal, and industry-level engagement processes related to the Just Transition, including regular and ad-hoc meetings, stakeholder representation, and the scope of discussions.
- **Assessment of key issues:** Analyse the main issues in these processes, focusing specifically on the perspectives of workers and local communities. This will involve understanding key concerns regarding job creation, skills development, social protection, and environmental sustainability.
- **Stakeholder analysis:** Identify the roles of government, business, NGOs, trade unions, community-based organisations, and federations in these engagement processes. Critically assess their mandates, proposals, and influence on decision-making.
- **Review of policies and plans:** Critically assess the mandates, policies, and plans of the above stakeholders, with a particular focus on how they align with the needs of workers and communities.
- **Identification of opportunities for workers and communities:** Map out potential avenues for more active and consistent participation of workers and communities, including how existing structures can be improved.
- **Recommendations:** Provide actionable recommendations for reforms to make engagement processes more effective, inclusive, and aligned with the needs of workers and communities.

5. METHODOLOGY

5.1. Evidence to support the research questions

- A critical analysis of the current engagement structures and processes, particularly regarding the representation and active participation of workers and communities;

whether they are actionable insights; how they communicate with policymakers; and how government and business stakeholders are mandated.

- Specific challenges workers and communities face in accessing decision-making spaces and achieving tangible outcomes (e.g., job creation, alternative livelihoods).
- Data on how engagement processes at different levels (national, provincial, municipal, and industry) currently function, including the stakeholders involved and their influence.

5.2. Additional data to support the research

- Theoretical analyses of participation and democracy, drawing on theories of social justice and environmental policy.
- International case studies of Just Transition processes in other countries, particularly in industrial sectors affected by climate change, to compare best practices and lessons learned.
- A critical review of existing policy decisions and frameworks in South Africa (such as the National Climate Change Response Policy and the Integrated Resource Plan), assessing how they align with the needs of workers and communities.
- A critical assessment of the methods of participation to date.

5.3. Type of data

- **Secondary sources:** A review of policy documents, reports, and previous studies related to the Just Transition, environmental policies, and labour issues.
- **Data analysis:** Quantitative data on participation rates, job losses in carbon-intensive industries, and socio-economic impacts of the transition.
- **Interviews and surveys:** Primary data collection through interviews with key stakeholders (workers, community representatives, government officials, business representatives) and possibly surveys to capture a broader range of perspectives from affected groups.

6. DELIVERABLES

The successful tenderer will be required to submit the following deliverables:

1. **Inception Report:** This report will detail the research methodology, work plan, and timelines.
2. **Mapping Report:** A comprehensive report mapping the engagement structures at all relevant levels (national, provincial, local, and industry), including descriptions of how they function and the stakeholders involved.

3. **Analysis of Key Issues:** A report that identifies and discusses the main issues raised by different actors in the Just Transition process, with a focus on workers and communities.
4. **Stakeholder Assessment Report:** A detailed assessment of the roles of government, business, NGOs, community-based organizations, trade unions, and federations, and how they contribute to or hinder effective participation in Just Transition processes.
5. **Policy Review:** A review of relevant industrial and environmental policies, assessing how these support or hinder the participation of workers and communities.
6. **Final Report with Recommendations:** A final comprehensive report that synthesizes all findings and includes practical recommendations for improving the effectiveness, inclusivity, and consistency of engagement structures for the Just Transition.

7. SUBMISSION OF THE FINAL REPORT

The final report must be submitted to the client by **25 August 2025**. The report should be clear, well-structured, and tailored to the target audience (trade union shop stewards and community representatives). The report should be written in accessible language and include an executive summary.

8. UNDERSTANDING PROJECT AIMS AND METHODOLOGY

The research is fundamentally aimed at identifying practical solutions for improving the inclusivity and effectiveness of engagement structures in the Just Transition. It is not only about mapping existing processes but also about providing actionable recommendations for reform, grounded in the real needs and experiences of affected workers and communities.

9. PROPOSED RESEARCH APPROACH

The research will follow a structured, phased approach: initial mapping of structures, stakeholder analysis, data collection, policy review, and final reporting. It will include both qualitative and quantitative methods to ensure a comprehensive understanding of the issues at hand.

10. REQUIREMENTS OF SUCCESSFUL TENDERER

The successful tenderer must demonstrate:

- **Proven experience** in conducting policy research, particularly in the areas of climate change, social justice, and labour relations.
- **Knowledge of South Africa’s Just Transition frameworks** and relevant industrial, environmental, and labour policies, with knowledge of the international situation.
- **Experience working with a variety of stakeholders**, including government agencies, trade unions, community-based organizations, NGOs, and business representatives.
- **Expertise in facilitating stakeholder consultations** and gathering input from diverse groups, especially marginalized communities.
- **Strong writing and communication skills**, including the ability to produce clear, concise, and accessible reports.
- **Capacity for collaborative working** with different actors and stakeholders.

11. PROJECT GOVERNANCE

The Service Provider will report to the JTLC Centre Manager.

12. TIMELINE

The research project is suggested to follow the timeline below, following award of tender and commencement from April 2025:

Task	Duration	Completion Date
Inception Report Submission	1 week	
Mapping Engagement Structures	4 weeks	
Stakeholder Assessment	4 weeks	
Key Issues Analysis	4 weeks	
Policy Review	3 weeks	
Draft Report Submission	2 weeks	
Final Report Submission	1 week	

13. INSTRUCTIONS TO TENDERERS

Tenderers are invited to submit proposals that address the following:

1. A detailed **methodology** for how the work will be carried out, including data collection, stakeholder consultations, and report writing.
2. A **timeline** for completion of each deliverable.

3. A **budget** proposal, outlining costs for each phase of the work.
4. A **CVs** of key personnel, highlighting relevant experience.
5. **References** from previous clients or similar projects.

Tenderers must submit their proposals by 14 April 2025. All proposals should be sent to jobs@tips.org.za.