

JUST SA International Study Tour: Terms of Reference for an International Consultant

INTRODUCTION

Trade & Industrial Policy Strategies (TIPS) is an implementing partner of the IKI-funded Just Transition to a Decarbonised Economy for South Africa (JUST SA) programme, which seeks to support the implementation of pathways towards an environmentally sustainable, climate change resilient, low-carbon economy and just society. As part of the project, TIPS is implementing several research and capacity building activities related to the green economy and Just Transition in South Africa, including face-to-face training in all nine provinces in the country and a Just Transition Community of Practice (CoP). The capacity building, knowledge sharing and targeted training is complementary to the Community of Practice where learning networks among (mainly municipal-level) government officials are established to share good practices.

In addition to these workstreams, an international study tour (IST) to India is planned to deepen the learning experience through action-orientated learning and exposure to “bottom-up” JT policy development and programming. To complement this work, TIPS is seeking an international service provider to support the JUST SA team in South Africa to plan and implement an action-orientated learning experience that exposes sub-national government officials to successful coal mine closure and at-scale (or scalable) green industrialisation projects in India, and initiatives that both improve municipal Just Transition Policy development processes and strengthen Just Transition policy coordination mechanisms between local, provincial, and national government.

BACKGROUND

South Africa’s Just Transition policy landscape is evolving, with multiple institutional arrangements and policy frameworks aiming to align local, provincial, and national levels. While there is progress, policy coherence across these levels faces challenges, particularly in integrating local government roles and realities into national objectives. Some provinces are proactive, especially those impacted by coal transitions. In addition, municipalities play a critical role in implementing just transition policies but face capacity constraints related to limited technical and financial resources and alignment with national strategies. Municipal-level policy

making is often characterised by fragmented local initiatives with no clear coherence between green economy, just transition and climate change initiatives. Many municipalities do not have dedicated staff with clear job descriptions (KPIs) and budget line items. These constraints can be seen as limiting factors preventing officials from taking coordinated action on the ground that feeds into provincial and national policymaking processes.

Recommendations for Strengthening Multi-Level Governance

The IST will need to provide exposure to projects and policies that are successfully addressing the following gaps:

- Weak coordination between national strategies and plans (like the PCC's Framework for a Just Transition in South Africa) and local implementation capacities.
- Lack of collaboration between municipalities and provinces on sector-specific transitions (e.g., energy, water, waste);
- Monitoring and Evaluation: Absence of standardised frameworks to track progress on just transition goals at sub-national levels;
- Local Participation: Insufficient community involvement in local planning processes, risking social resistance to transition plans.

Participants/delegates should be exposed to projects/initiatives that address one or more of the following challenges:

- Decentralised governance reforms for Just Transition policy development: Empowering South Africa municipalities with clearer mandates, funding, and technical support to design and implement Just Transition projects / initiatives.
- Multi-level governance platforms: Enhancing collaboration between core stakeholders (e.g., PCC, SALGA) and provincial and local government to co-develop Just Transition implementation roadmaps/ plans and embed just transition principles into municipal IDPs and budget frameworks.
- Provincial intermediation: Capacitating provincial government to act as intermediaries, aligning local plans with national frameworks.

REQUIREMENTS OF SUCCESSFUL TENDERER

The successful service provider should possess the following skills and experience:

- A good understanding of Just Transition policies and plans in India and how they relate to the South African context at the national and subnational levels;
- Demonstrated experience in planning and facilitating international study tours that provide participants with an immersive, action-oriented learning experience. Ideally, the successful service provider will have some experience of planning and facilitating international study tours related to the Just Transition that achieved some or all of the following objectives:
 - a. Enhancing the performance/ effectiveness and resilience of municipalities in Just Transition Policy Development.
 - b. Facilitating municipal Just Transition Policy development processes through action orientated research with an international counterpart.
 - c. Improving bottom up Just Transition Policy development at a local government level to inform national policy development.
 - d. Exposing sub-national government officials to green industrialisation projects that are running successfully at scale in India.
 - e. Generating insights on successful coal mine closure projects in India and worker protection policies.
- Be well connected with relevant national and subnational government stakeholders in India, including stakeholders who can enable site visits of relevant projects in a particular region;
- Be available to accompany the JUST SA IST team for a total of 6 days in October 2026 in India; and
- A successful track record of clients references to be provided.

SCOPE OF WORK

The successful service provider will be required to undertake the following scope of work:

- Co-develop a program of engagements that expose participants to Just Transition good practice at local government level and address, or offer potential solutions for green industrialization;

- Following on from the above, the consultant will be expected to engage with national and subnational government officials and policymakers in the development of the study tour programme (see draft itinerary included in Annexure A). They will also be expected to ensure on-site access to projects and, in the case, of other engagements, a suitable meeting venue as appropriate;
- Logistics: The expert will be responsible for working with the TIPS JUST SA Project Coordinator to plan all the logistical arrangements for the IST (hotel accommodation, travel in and around New Delhi and to the region; and

DELIVERABLES

The following deliverables are required:

- A project plan that outlines planning activities leading up to the study tour for a period of 6 months prior to arrival in the country (February 2026 to October 2026).
- A detailed county study tour program (6 days) that includes site visits to projects, meetings with key stakeholders at local, provincial and national levels

PROJECT GOVERNANCE

The Service Provider will report to the TIPS Just SA CoP lead (Elize Hattingh).

TIMELINE

The project will be expected to commence in February 2026 following contract award and to take approximately 6 months from inception to completion to organise the study tour. Thereafter, technical support will be required to contribute to findings (key lessons learned) that will be captured in a study tour report .

BUDGET

The service provider is required to provide a detailed quotation that includes the following:

- Design, setup of the study tour program (itinerary).
- Logistical support related to travel, accommodation, meeting venues, site visits, networking and engagements that are aligned with the program.

- The proposal needs to include a cost breakdown of professional hours to cover 10-15 consultant days, including in-country support during the IST. This excludes any costs related to accommodation, catering and travel.

INSTRUCTIONS TO TENDERERS

Tenderers are invited to respond to these terms of reference by submitting the following:

- i. A short (maximum 5 page) proposal that includes a description of proposed services and a delivery methodology
- ii. Indicative work plan.
- iii. Profile and CVs of key personnel.
- iv. Cost breakdown

The maximum length of the proposal indicated above does not include the indicative work plan and CV(s) of key personnel. Proposal must be sent to TIPS for the attention of Natasha Du Plessis natasha@tips.org.za
For technical questions email: Elize Hattingh, elize@tips.org.za. Closing date for proposals: 15 January 2025 at 16h00 (SAST).