
TERMS OF REFERENCE (TOR) FOR QUARTERLY TRACKERS ON KEY POLICY DEVELOPMENTS AND DEBATES

1. INTRODUCTION

The objective of this project is to develop a comprehensive and user-friendly framework for tracking key policy developments and debates both within South Africa and internationally, with a particular focus on issues relevant to trade unions and their members. The reports will serve as a resource for union negotiators at national, provincial, industrial, and company levels, enabling them to stay informed of critical policy changes and developments, identify potential areas of impact on workers¹, and prepare for upcoming negotiations.

2. PURPOSE

The central argument is that the availability of a timely, clear and relevant policy-tracking mechanism is essential for empowering union negotiators to represent workers interests effectively in the shifting national and international policy landscape. There seems to be an issue of accessibility alongside the issue of availability of a policy-tracking mechanism. This research shall provide a structured, accessible policy-tracking mechanism that trade unions view as a valuable resource to empower them in decision-making and negotiation processes by providing clear, actionable insights on policies and economic trends that effect workers and communities directly.

3. BACKGROUND AND PROBLEM STATEMENT

Trade unions, particularly in South Africa, operate in a dynamic policy environment where national, provincial, and global developments can significantly influence workers' rights, labour conditions, and industrial relations. Given the fast-evolving nature of policy debates around climate change, economic reform, labour rights, and corporate governance, union negotiators

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

often lack timely and clear information that connects policy changes with real impacts on workers.

The problem being addressed is that workers are impacted by policies and engagements in response to climate change yet, these operate in forums, spheres, and spaces that make it difficult for unions to engage effectively. Without an efficient way of tracking and understanding these policy shifts, union negotiators and community advocates are disadvantaged when advocating for their members rights and interests.

The proposed research will develop a quarterly tracker template and the first tracker to systematically document and analyse key policy developments. It will provide union negotiators with a tool that synthesizes complex information into actionable insights, helping them to stay informed, anticipate potential challenges, and negotiate effectively on behalf of workers and communities. This research will bridge the gap between evolving policies and the need for clear, accessible data on the broader political and economic landscape, for informed decision-making. This project was directly requested by the Just Transition Labour Centre Steering Committee.

4. SCOPE OF WORK

The contractor will:

- Develop a **template** for the quarterly tracker that outlines the structure, categories, and key issues to be covered.
- Populate the **template** with detailed and referenced content that highlights key policy developments from both South Africa and internationally.
- Provide a **sectoral analysis** that highlights which industries, provinces, and companies are likely to be impacted by these developments.
- Include analysis on **upcoming issues** in the next quarter and make recommendations for union negotiators.
- Deliver **one completed quarterly tracker** using the template, covering the first quarter of the year.
- Ensure that the report is presented in an accessible, worker-friendly format, with links to source materials and further reading.
- After the first report, assess the effectiveness of the tracker format and recommend whether to maintain the quarterly tracker or transition to a different format (e.g., briefing notes or less frequent publications).

- Establish **connections with relevant trade unions** and industry representatives to ensure the content is relevant and timely.

5. EVALUATION QUESTIONS

The aim is to develop the key dimensions of the tracker.

- What will the outline be?
- How will monitoring be done effectively – based on final documents, stakeholder interviews or media reports? The critical step is to identify (a) what institutions are working on policies, and (b) where the engagement platforms are. This stuff is happening across the spheres of the state and in various national departments and industry-level institutions.
- How can the tracker be organized to provide labour with both an early-warning system and a better understanding of policy processes as they evolve?

6. METHODOLOGY

6.1. Evidence to support the research questions

- Ensure that the key elements reflect current trends, in each tracker.
- A policy audit of South African climate policy (DFFE, DTI, DOMRE, DALRRD) at the local, provincial and national levels.
- Discourse analysis on Eskom, the PCC, NEDLAC, government documents. Industry plans, sectoral platforms, bargaining councils, SETA's, etc.
- Feedback from union negotiators, trade unions, and stakeholders about the gaps in current tools or the need for a structured policy tracker.
- Case studies or examples of other sectors where timely policy analysis has benefited decision-making.

6.2. Additional data to support the research

- The research will use historical analysis of past labour policy decisions, especially in sectors that have seen significant shifts (such as climate policy or labour reform). Theoretical analysis of industrial relations and labour law frameworks will be used to contextualise the policy developments. International comparisons and best practices from other countries or sectors will also be referenced to understand how policy trackers or similar tools have been utilised to empower worker representatives.

6.3. Type of data

- Secondary sources: such as IPCC reports, PCC reports, NEDLAC submissions, technical reports, and corporate governance documents.
- Publicly available datasets on policy changes, labour conditions, and industrial relations.
- Desktop academic research.
- In-depth interviews with people in the policy department at unions to ascertain where they are engaging.

7. DELIVERABLES

The deliverables for this project include:

1. **Template for Quarterly Tracker:** A structured template that outlines the key components and reporting format for the tracker.
2. **Populated Tracker Report:** One full quarterly report using the developed template, containing the following components:
 - A summary of key policy developments in South Africa and internationally.
 - Impact analysis of these developments on various industries, sectors, and companies.
 - Key upcoming policy developments for the next quarter.
 - Recommendations for union negotiators based on these developments.
 - References to sources such as IPCC Reports, NEDLAC, and company reports.
3. **Evaluation Report:** After completing the template and one full quarterly tracker report, the contractor should assess whether the tracker should remain a quarterly report, transition to a more frequent one-page briefing, or shift to a less frequent format. This evaluation will be based on feedback from union negotiators, the utility of the reports, and their impact on the decision-making process.

8. SUBMISSION OF FINAL REPORT

The final deliverables, including the two tracker reports and the evaluation of the tracker format, are to be submitted in electronic form (PDF and Word formats) no later than **three months from the commencement date of the project**.

9. UNDERSTANDING THE PROJECT AIMS AND METHODOLOGY

This project aims to create a vital tool for union negotiators, which will be a key resource in addressing evolving labour policies and ensuring that workers are better informed and represented. By focusing on practical, clear, and relevant information, the project will empower unions to take proactive stances in negotiations and advocate effectively for workers' rights. In fulfilling the project aims, it would be crucial to look at the accessibility component of the research, alongside the availability component.

10. PROPOSED RESEARCH APPROACH

The research approach will involve comprehensive data gathering from primary sources (where applicable) and secondary sources to both report on and assess the implications of climate change related policies and debates on South African workers and communities. Additionally, to set up a quarterly tracker mechanism to assess how these develop over time and aid monitoring of the possible implications.

11. REQUIREMENTS OF THE SUCCESSFUL TENDERER

The successful tenderer should meet the following criteria:

- Demonstrable experience in policy analysis and report writing, particularly in the field of labour relations, economics, or industrial policy.
- A solid understanding of South African labour law, key trade union structures, and industrial sectors.
- Proven ability to synthesize complex policy issues and make them accessible and relevant to a diverse audience, including union negotiators.
- Strong research skills and the ability to reference multiple sources, including but not limited to IPCC reports, NEDLAC submissions, and corporate reports.
- Ability to work collaboratively with trade unions and other relevant stakeholders to ensure the reports are relevant and actionable.
- A track record of delivering high-quality reports within tight deadlines.

12. PROJECT GOVERNANCE

The project will be overseen by the Just Transition Labour Centre's Centre Manager.

Regular check-ins will be held to assess progress and ensure alignment with the goals of the project. The Centre Manager will also coordinate with relevant trade unions to obtain feedback on the effectiveness of the reports.

13. TIMELINE

The project will be expected to commence in April 2025, following contract award and to take approximately three (3) months from inception to completion.

14. INSTRUCTIONS TO TENDERERS

Tenderers are invited to submit short proposals (maximum 10 pages) s include:

1. A detailed work plan, showing how they will complete the project within the given timeline.
2. A cost proposal, including all costs associated with the project.
3. Examples of previous relevant work, particularly in the area of policy analysis, labour relations, or industrial sectors.
4. References from previous clients who can attest to the tenderer's ability to deliver high-quality work on time.
5. Profile and CV of key personnel

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