

Terms of reference (ToR) for the procurement of services below the EU threshold

[CONFIDENTIALITY]

Terms of Reference: Benchmarking Study on Gender Mainstreaming at NERSA – Internal and External Integration with Strategic Recommendations	Project number/ cost centre: 22.2187.7-001.00
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0. List of abbreviations

ACER	European Agency for the Cooperation of Energy Regulators
AG	Commissioning party
AN	Contractor
GTCC	General Terms and Conditions of Contract for supplying services and work
BMZ	German Federal Ministry for Economic Cooperation and Development
CCSA	Competition Commission of South Africa
CV	Curriculum Vitae
DMRE	Department of Mineral Resources and Energy
EPRA	Energy and Petroleum Regulatory Authority
ERC	Energy Regulatory Commission
FSCA	Financial Sector Conduct Authority
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH
ICASA	Independent Communications Authority of South Africa
IRENA	International Renewable Energy
NDP	National Development Plan
NERC	Energy and Petroleum Regulatory Authority
NERSA	National Energy Regulator of South Africa
NDP	National Development Plan
NT	National Treasury
Ofgem	Office of Gas and Electricity Markets
PSC	Public Service Commission
SAGEN	South African German Energy Programme
SAHRC	South African Human Rights Commission
SALGA	South African Local Government Association
SDG	Sustainable Development Goal
ToRs	Terms of reference
WEGE	Women Empowerment and Gender Equality Strategy

1. Context

1.1. Brief introduction to SAGEN

The South African-German Energy Programme (SAGEN) supports South African partners to manage the energy transition with a focus on renewable energy and energy efficiency. SAGEN is funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) in cooperation with the Department of Mineral Resources and Energy (DMRE), Eskom, the National Energy Regulator of South Africa (NERSA), and the South African Local Government Association (SALGA) under the government-to-government coordination of National Treasury (NT).

SAGEN's support includes the following fields of intervention towards the transformation of the South African energy sector:

- Power Sector Reform and Regulation,
- Power Systems Planning and Operation,
- Embedded Generation in Distribution Networks,
- Municipal Energy Management Systems,
- Capacity Building for the Energy Transition and EDI Reform, and
- Gender Mainstreaming in Energy.

As part of SAGEN's collaboration with the DMRE and other organisations, the programme aims to assess the feasibility of advancing gender mainstreaming initiatives within the energy sector. This includes supporting policies and capacity-building efforts to foster greater gender equality in traditionally male-dominated areas such as energy policy, regulatory frameworks, and technical operations. By promoting gender-responsive practices, SAGEN aims to contribute to a more inclusive, diverse, and equitable energy system, strengthening the participation of women and marginalised groups across various levels of decision-making and implementation within the energy transition.

1.2. Brief context of the project

The National Energy Regulator of South Africa (NERSA) serves as the regulatory authority for South Africa's electricity, piped-gas, and petroleum pipeline industries, as outlined in the National Energy Regulator Act of 2004. By aligning with government policies, NERSA ensures fair access, efficiency, and sustainability in the energy sector, significantly contributing to national economic development and sustainable energy practices. Beyond regulatory responsibilities, NERSA recognizes the importance of advancing socio-economic goals, including environmental sustainability, economic growth, and social inclusion.

A key element of NERSA's mission involves mainstreaming gender sensitivity across its regulatory framework and internal operations, aligning with national and global commitments to gender equality. South African policies, such as the **Women Empowerment and Gender Equality (WEGE) Strategy** and the **National Development Plan (NDP)**, reinforce this priority by promoting inclusive development and advocating for gender-responsive practices across sectors. The WEGE Strategy, led by the Department of Mineral Resources and Energy (DMRE), provides guidelines for integrating gender considerations into organisational processes, offering structured support to public entities like NERSA in addressing gender disparities, supporting women's advancement, and fostering an equitable work environment.

NERSA's commitment to gender sensitivity includes creating a workplace culture that values diversity and equality. However, like many technical fields, South Africa's energy sector remains predominantly male-dominated, particularly in leadership and technical roles, which impacts equitable representation and decision-making. NERSA aims to address these imbalances by embedding gender awareness across all levels of its operations, working to create a supportive environment for women and marginalized groups through policies informed by accurate insights into workforce dynamics, including employee knowledge and perspectives on gender issues.

The WEGE Strategy outlines several key areas critical to NERSA's approach:

- **Gender-Responsive Budgeting and Planning:** Allocating resources toward gender-focused initiatives within the organisation.
- **Gender Equality Monitoring and Evaluation:** Tracking gender-related metrics to measure progress toward national equality goals.
- **Skills Development and Leadership Training for Women:** Creating opportunities for career advancement and leadership development for women.
- **Workplace Inclusivity Policies:** Implementing policies that foster a safe, inclusive environment and address cultural barriers to gender equality.

By aligning with the WEGE Strategy, NERSA not only meets legal requirements but also strengthens its reputation as a progressive, inclusive employer within South Africa's energy landscape. Its gender-sensitive approach benefits both internal operations and broader regulatory practices, ensuring that the organisation's policies contribute to a fair, inclusive, and sustainable energy sector, while supporting South Africa's objectives under frameworks like the United Nations Sustainable Development Goals, particularly SDG 5 (Gender Equality) and SDG 10 (Reduced Inequalities).

1.3. Objectives of the assignment

NERSA, in collaboration with GIZ, aims to conduct a **benchmarking study** to assess the effectiveness of gender mainstreaming within the organisation. This benchmarking exercise will compare NERSA's gender mainstreaming efforts against recognized national and international best practices within the energy sector and public regulatory bodies. The study will involve a systematic, comparative analysis of successful gender-responsive initiatives implemented by similar organisations both locally and globally, with a focus on up to **eight examples**.

The primary goal of this benchmarking study is to **evaluate NERSA's current gender mainstreaming efforts** and identify opportunities for improvement. By comparing NERSA's policies, practices, and organisational culture against best practices, the study will provide valuable insights to enhance gender inclusivity within NERSA's operations and regulatory functions. This will include a thorough examination of how gender is incorporated into internal policies, such as **Human Resource Management, Supply Chain Management, and Budgeting**, as well as external-facing policies like **licensing requirements, compliance monitoring, tariff-setting, and consumer protection policies**.

Following the benchmarking study, insights from the ongoing **gender audit** and the study findings will be used to **develop a comprehensive action plan**. This **action plan** will outline specific steps to integrate gender mainstreaming into NERSA's policies, culture, and daily operations. It will include:

- **Strengthening gender-responsive policies** and practices to enhance inclusivity within NERSA.
- **Embedding gender equality** into workplace operations through targeted procedures, including career progression, resource allocation, and decision-making processes.
- Establishing **measurable indicators** aligned with the **Women Empowerment and Gender Equality (WEGE) Strategy** to track progress.
- Reviewing key policies such as **Human Resource Management**, **Supply Chain Management**, and **Budgeting** for gender responsiveness, as well as assessing staff perceptions of gender inclusivity.

The action plan will take into account the challenges and strategic goals identified through the benchmarking study and gender audit. It will also include recommendations on promoting **women's leadership**, fostering **gender-sensitive organisational structures**, and aligning NERSA's practices with **national and international gender frameworks**.

This action plan will serve as a **roadmap** to guide NERSA in its efforts to create a more **inclusive and gender-equitable** environment, ensuring that **gender mainstreaming** is integrated across all levels of the organisation. This initiative is crucial in advancing South Africa's commitment to **gender equality in the energy sector**.

The benchmarking study and subsequent action plan will provide NERSA with **evidence-based strategies** for advancing gender inclusivity, positioning NERSA as a **leader in gender mainstreaming** within the regulatory body landscape. By fostering an organisational culture where all employees, regardless of gender, feel valued, NERSA will contribute to the broader goal of **gender equity** in the energy sector.

2. Tasks to be performed by the contractor

Under this assignment, there are two work packages which are described below. The anticipated period of assignment is from the **01st of June 2025** until **28th February 2026**. **This work package includes time to ensure sound project management for the duration of the assignment. It entails the following:**

2.1. Work package 0: Project Management

2.1.1. Organisation of key meetings

- **Organisation of an in-person inception meeting:** (at GIZ or NERSA offices) within two weeks of appointment, with a presentation prepared on the work approach/methodology, draft work plan for the project and proposed mitigation measures for any risks/challenges foreseen. The work plan should be updated following the inception meeting, and utilised during progress update meetings, where any deviations must be discussed and agreed upon.
- **Monthly Progress Update Meetings:** Facilitate monthly progress update meetings via Microsoft Teams, where key discussion points and action items will be documented by the contractor and shared with the project steering team (the steering team will include GIZ's gender mainstreaming advisor, key members of NERSA's gender team, staff from relevant NERSA departments e.g., HR)
- **Feedback Meeting on draft results:** In collaboration with GIZ and NERSA, organise an in-person meeting at NERSA's or GIZ's offices in Pretoria to gather feedback on the draft results of the assignment. The contractors will handle invitations, set the agenda, prepare

the presentation, and document key discussion points for incorporation into the draft report and action plan.

- **Final Presentation results:** Present the final findings of the assignment to NERSA, either in-person or online. The contractors will manage invitations, set the agenda, prepare the presentation, and capture key discussion points to be included in the final report as necessary.
- Please note that all emails and correspondence from GIZ and NERSA must be replied to within **48 hours**.

2.1.2. Deliverables:

- An in-person inception meeting conducted, with a prepared presentation (maximum 20 slides) available in both PowerPoint and PDF formats.
- An updated work plan reflecting discussions from the inception meeting. The work plan should outline key activities such as defining roles of stakeholders, timelines, risk management, and communication strategies, with a focus on data collection, analysis, and report delivery. The plan should also include milestones, deliverables, and budget allocation to ensure successful project execution.
- Monthly virtual progress update meetings.
- A virtual or in-person meeting held with NERSA to present the draft results, with invitations sent out and a prepared presentation (maximum 40 slides) available in both PowerPoint and PDF formats.
- A virtual or in-person meeting conducted to present the final study results to NERSA, with invitations sent out and a prepared presentation (maximum 40 slides) available in both PowerPoint and PDF formats.

2.2. Work package 1: Benchmark Against International and National Best Practices

2.2.1 Benchmarking Gender Mainstreaming in Regulatory Bodies

The objective of this work package is to benchmark NERSA's gender mainstreaming efforts against recognised international and national best practices within the energy sector and among public regulatory bodies. This benchmarking will involve a systematic comparative analysis of successful gender-responsive initiatives implemented in similar organisations both locally and globally (**up to eight examples**).

The benchmarking exercise will not only focus on internal gender mainstreaming efforts—such as recruitment, retention, leadership development, and budgeting—but will also assess how regulatory bodies integrate gender into their **outward-facing policies, stakeholder engagements, and regulatory functions**. This includes examining how gender considerations are incorporated into licensing requirements, compliance monitoring, tariff-setting, consumer protection policies, and industry transformation mandates.

Examples of such organisations could include, but not limited to (other relevant examples can be proposed):

- **Local Examples:**

Competition Commission of South Africa (CCSA)

- Conducted market inquiries that assess gender disparities in economic participation.
- Example: The Grocery Retail Market Inquiry considered barriers to entry for women-owned businesses.

- Relevance to NERSA: This aligns with gender-sensitive procurement in energy markets, ensuring women's participation in electricity generation and distribution contracts.

Public Service Commission (PSC)

- Evaluated gender representation in senior leadership across government institutions.
- Conducted an audit of gender policies and mainstreaming efforts within the public sector.
- Relevance to NERSA: This could inform NERSA's internal gender audit by examining representation, promotion policies, and leadership pipelines.

South African Human Rights Commission (SAHRC)

- Investigated gender equity in the workplace through employment equity hearings.
- Published reports on gender-based discrimination in regulatory frameworks.
- Relevance to NERSA: Could offer insights into gender-sensitive regulatory policies, especially regarding gender-responsive electricity pricing and consumer protection.

Financial Sector Conduct Authority (FSCA)

- Integrated gender-sensitive financial policies to improve financial inclusion for women.
- Engaged in corporate governance reviews, ensuring gender representation in financial institutions.
- Relevance to NERSA: Provides an example of gender-responsive corporate governance and regulatory oversight, which could be applied to the energy sector's licensing and compliance frameworks.

Independent Communications Authority of South Africa (ICASA)

- Implemented policies to increase women's participation in broadcasting and ICT leadership.
- Mandated that licensed entities comply with employment equity and diversity requirements.
- Relevance to NERSA: Can inform how gender considerations are integrated into licensing requirements for energy providers.

• International Examples:

Office of Gas and Electricity Markets (Ofgem) – Great Britain

- Promoted gender diversity in the energy sector by incorporating gender considerations in regulatory decisions.
- Encourages energy companies to report on gender representation in leadership roles.
- Relevance to NERSA: Can inform NERSA's efforts in integrating gender equity into energy market regulations and corporate reporting requirements.

International Renewable Energy Agency (IRENA)

- Advocates for **gender equality in renewable energy policies and investment strategies.**
- Conducts research on **women's participation in clean energy sectors** and policy recommendations for gender inclusion.
- **Relevance to NERSA:** Provides insights into **gender-responsive renewable energy policies** and investment frameworks.

Energy Regulatory Commission (ERC) – Philippines

- Works to improve gender equality in energy governance, ensuring energy access policies consider gendered impacts (e.g., energy affordability, rural electrification).
- Integrates gender mainstreaming into electricity pricing and subsidy policies.
- Relevance to NERSA: Can guide NERSA on gender-sensitive electricity pricing frameworks and equitable energy access policies.

European Agency for the Cooperation of Energy Regulators (ACER)

- Promotes diversity and inclusion in energy regulation across the European Union.
- Ensures gender considerations are part of regulatory policies and market frameworks for energy distribution.
- Relevance to NERSA: Offers a model for regional cooperation on gender-responsive regulation in the Southern African Power Pool (SAPP).

Energy and Petroleum Regulatory Authority (EPRA) – Kenya

- Integrated gender mainstreaming in energy regulation, including capacity-building initiatives for women in energy.
- Ensures that gender perspectives are considered in national energy policies, particularly in rural electrification and access to clean cooking.
- Relevance to NERSA: EPRA's approach to gender-inclusive energy access policies could inform NERSA's regulatory framework for energy affordability and rural electrification.

National Energy Regulator of Nigeria (NERC)

- Launched initiatives to increase female participation in the power sector, including women-led electricity cooperatives.
- Developed policies on gender-sensitive energy pricing and consumer protection.
- Relevance to NERSA: Offers insights into gender-inclusive licensing and consumer protection frameworks in the electricity sector.

These examples are indicative, and NERSA will select benchmarking organisations based on clear criteria such as relevance to its context, demonstrated success in gender-sensitive practices (internally and externally), and the applicability of these practices to NERSA's goals. Since "best practices" may not be easily ranked, the approach will focus on peer comparisons, identifying policies and practices that have proven effective in similar organisations.

2.2.2. Deliverables:

- **A detailed benchmarking report** presenting best practices identified during the analysis, with tailored recommendations for NERSA. The report will include insights on:
 - Internal gender mainstreaming efforts (workplace policies, leadership programs, gender budgeting, etc.).
 - **External gender mainstreaming efforts (gender considerations in licensing, compliance, consumer protection, and industry transformation).**
 - Strategies for implementing gender-responsive policies in regulatory decision-making.
 - Methods for stakeholder engagement to promote gender equality in the energy sector.

Collaborative development of recommendations with NERSA to ensure their practicability and to facilitate the integration of successful strategies into NERSA's operational framework. This will include a roadmap for implementation, with clear steps and milestones.

2.3. Work Package 2: Develop a Comprehensive Action Plan for Gender Mainstreaming

NERSA is currently conducting a gender audit to assess the extent of gender mainstreaming within its policies, programmes, and organisational culture. This audit includes baseline data collection, a participatory analysis of gender responsiveness, and the development of recommendations to enhance gender equality initiatives. The findings from this process will serve as the foundation for developing a comprehensive action plan under this work package. The contractor, in collaboration with members of the project team, will use insights from the gender audit to create a detailed action plan outlining specific steps to integrate gender mainstreaming into NERSA's policies, culture, and daily operations. This participatory approach will ensure that NERSA's organisational needs, challenges, and strategic goals are fully reflected in the plan. The action plan will incorporate key elements identified through the audit, including:

- Strengthening gender-responsive policies and practices to enhance inclusivity.
- Embedding gender equality into workplace operations through targeted procedures.
- Establishing measurable indicators aligned with the WEGE Strategy to track progress.
- The development of the plan will also build on key audit activities, such as the review of NERSA's policies (e.g., Human Resource Management, Supply Chain Management, and Budgeting) for gender responsiveness, an analysis of women's participation across organisational levels, and an assessment of staff perceptions regarding gender inclusivity. Additionally, the plan will integrate recommendations on promoting women's leadership, fostering gender-sensitive organisational structures, and aligning NERSA's practices with national and international gender frameworks.

2.3.1. Deliverables

- **A practical action plan** tailored to NERSA, with clear objectives and actionable steps to advance gender mainstreaming. The plan will be co-developed with NERSA stakeholders, ensuring feasibility and organisational buy-in. Realistic and measurable indicators will be defined, considering NERSA's resources, timeframes, and operational constraints.
- **A presentation of the action plan** to NERSA stakeholders and GIZ representatives, providing a platform for discussion, validation, and mobilization of support for implementation.

Collaboration and Implementation

This study will be a collaborative effort involving NERSA, specifically the members of the gender task team, GIZ, and the contractor, ensuring a comprehensive approach to identifying and addressing gender-related barriers.

NERSA: Will provide access to relevant documents, facilitate internal contact engagements at NERSA, and actively participate in discussions and workshops throughout the project.

GIZ: Will offer strategic guidance by overseeing overall project management, ensuring that each phase aligns with both NERSA's objectives and ensure that the project aligns with broader gender initiatives within the energy sector by coordinating project goals with key national and international frameworks, such as the WEGE strategy.

Contractor: Will lead the research, analysis, and reporting activities, engaging closely, through regular meetings as defined in Chapter 2, with both NERSA and GIZ to ensure that activities are practical, actionable, and tailored to the specific needs of the organisations. NERSA and GIZ will also provide input at key stages, including, planning, and approval of steps, ensuring that the project remains aligned with organisational priorities and objectives throughout the process.

The milestones outlined in the **table below** must be achieved during the contract term, and all deliverables are to be submitted to the project steering group (Includes members from GIZ, NERSA gender team and the contractor) for review and feedback; therefore, the contractor should therefore account for two rounds of feedback in their work plan and allocated expert days.

2.4 Milestones Table

Milestones/process steps/partial services	Deadline/person responsible
Organisation of an inception meeting	June 2025 (within 2 weeks of appointment) / Contractor & GIZ
Draft Work Plan for the project	June 2025 / Contractor & GIZ
Feedback loop on Draft Work Plan	June 2025 / GIZ & NERSA
Draft Benchmarking Report	August 2025 / Contractor
Feedback loop on Draft Benchmarking Report	August 2025 / GIZ & NERSA
Final Benchmarking Report	September 2025 / Contractor & GIZ
Draft Action Plan	October 2025 / Contractor & GIZ
Feedback loop on Draft Action Plan	October 2025 / GIZ & NERSA
Final Action Plan	November 2025 / Contractor & GIZ
Presentation of the action plan	December 2025 / Contractor, GIZ & NERSA
Feedback incorporation and finalisation of action plan	January 2026 / Contractor, GIZ & NERSA
Organisation of Monthly Progress Update Meetings	Ongoing (monthly) / Contractor & GIZ
Draft Progress Report	Ongoing (monthly) / Contractor
Draft Final Report	February 2026 / Contractor
Feedback loop on Draft Final Report	February 2026 / GIZ & NERSA
Final Report	February 2026 / Contractor & GIZ

3. Concept

In the technical proposal of the tender, the tenderer is required to show *how* the objectives defined in Chapter 4 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Note: The numbers in parentheses correspond to the lines of the technical assessment grid.

Technical-methodological concept

Strategy (1.1): The tenderer is required to consider the tasks to be performed with reference to the objectives of the services put out to tender (see Chapter 1 Context) (1.1.1). Following this, the tenderer presents and justifies the explicit strategy with which it intends to provide the services for which it is responsible (see Chapter 2 Tasks to be performed) (1.1.2).

The tenderer is required to present the actors relevant for the services for which it is responsible and describe the **cooperation (1.2)** with them.

The tenderer is required to describe the key **processes** for the services for which it is responsible and create an **operational plan** or schedule (1.4.1) that describes how the services according to Chapter 2 (Tasks to be performed by the contractor) are to be provided. In particular, the tenderer is required to describe the necessary work steps and, if applicable, take account of the milestones and **contributions** of other actors (partner contributions) in accordance with Chapter 2 (Tasks to be performed) (1.4.2).

Project management of the contractor (1.6)

The tenderer is required to explain its approach for coordination with the GIZ project. In particular, the project management requirements specified in Chapter 2 (Tasks to be performed by the contractor) must be explained in detail.

The tenderer is required to draw up a **personnel assignment plan** with explanatory notes that lists all the experts proposed in the tender; the plan includes information on assignment dates (duration and expert days) and locations of the individual members of the team complete with the allocation of work steps as set out in the schedule.

The tenderer is required to describe its backstopping concept. The following services are part of the standard backstopping package, which (like ancillary personnel costs) must be factored into the fee schedules of the staff listed in the tender in accordance with Section 3.3.1 of the GIZ AVB:

- Service-delivery control
- Managing adaptations to changing conditions
- Ensuring the flow of information between the tenderer and GIZ
- Assuming personnel responsibility for the contractor's experts
- Process-oriented steering for implementation of the commission
- Securing the administrative conclusion of the project

4. Personnel concept

Qualifications of proposed staff

The tenderer is required to propose personnel for the positions specified here and described with respect to the areas of responsibility and qualifications on the basis of relevant CVs.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team Leader

Tasks of the Team Leader:

- Overall responsibility for the advisory packages of the contractor, ensuring quality and adherence to deadlines.
- Coordinating communication with GIZ and NERSA teams (GIZ gender advisor and NERSA gender team) involved in the project.
- Managing personnel needs within the available budget, planning, steering assignments.
- Providing regular reporting and progress updates as per project deadlines.
- Contributing to the technical delivery of the project and overseeing the overall technical direction.
- Coordinate report writing, draft documents, feed in feedback from NERSA and GIZ.

Qualifications of the Team Leader:

- **Education/training (2.1.1):** Post-graduate university degree (Master's) in Gender Studies, Social Sciences, or a related field, with a Project Management short course certificate.
- **Language (2.1.2):** C2-level proficiency in English.
- **General professional experience (2.1.3):** 6 years of professional experience in gender equality, social inclusion, or capacity-building projects.
- **Specific professional experience (2.1.4):** 4 years of demonstrated experience in managing or leading studies and initiatives focused on gender mainstreaming and organisational culture in public, private, or regulatory bodies.
- **Leadership/management experience (2.1.5):** 5 years of management/leadership experience as a project team leader or manager in a company.
- **Regional experience (2.1.6):** 4 years of experience in projects in South Africa, of which 2 years in projects in governmental or regulatory institutions.
- **Development cooperation (DC) experience (2.1.7):** N/A.
- **Other (2.1.8):** N/A.

Key Expert 1: Gender and Social Inclusion Expert

Tasks of Key Expert 1: Gender expert

- Support the overall technical delivery of the gender mainstreaming component, ensuring that gender equality principles are integrated into all aspects of the project.
- Collaborate with the Team Leader to ensure the gender-related activities are aligned with the overall project objectives and timelines.

- Coordinate communication specifically related to gender issues with GIZ's gender advisor, NERSA's gender team, and other relevant stakeholders.
- Provide subject-matter expertise on gender analysis, social inclusion, and related frameworks to guide the development and implementation of gender-responsive actions.

Qualifications of Key Expert 1:

- **Education/training (2.2.1):** Post-graduate university degree (Honours) in Gender Studies, Social Sciences, or a related field.
- **Language (2.2.2):** C2-level proficiency in English.
- **General professional experience (2.2.3):** 5 years of professional experience in gender equality and social inclusion.
- **Specific professional experience (2.2.4):** 3 years of experience conducting gender assessments and developing gender-responsive strategies in the public or private sector, particularly in South Africa.
- **Leadership/management experience (2.2.5):** N/A.
- **Regional experience (2.2.6):** 3 years of experience in projects in South Africa, including collaboration with governmental agencies.
- **Development cooperation (DC) experience (2.2.7):** N/A.
- **Other (2.2.8):** N/A.

Key Expert 2: Junior Gender Specialist

Tasks of Key Expert 2:

- Assist in gender mainstreaming activities, supporting the Gender Expert 1 in data collection, analysis, and reporting on gender-related aspects of the project.
- Provide logistical support for stakeholder engagement sessions, ensuring scheduling, documentation, and proper coordination.
- Conduct background research on gender policies, strategies, and best practices in the energy sector.
- Help in the preparation and review of project documents, ensuring alignment with project objectives and gender equality strategies.
- Support the drafting of recommendations for gender mainstreaming, social inclusion, and capacity-building activities.
- Provide administrative and logistical support, including managing project schedules, running of meetings, updating databases, and assisting with reporting.
- Coordinate communication between project teams (GIZ, NERSA, and other partners), ensuring everyone is up-to-date with developments and deadlines.
- Assist in organising project events, meetings, and workshops related to the project.
- Support the development of knowledge-sharing platforms, ensuring accessibility of information across stakeholders.

Qualifications of Key Expert 2:

- **Education/training (2.3.1):** Bachelor's degree in Gender Studies, Social Sciences, Development Studies, or a related field.
- **Language (2.3.2):** C2-level proficiency in English.

- **General professional experience (2.3.3):** 3 years of experience working on gender equality or social inclusion projects.
- **Specific professional experience (2.3.4):** 1-2 years of hands-on experience with gender assessments, community engagement, or capacity-building initiatives, particularly in the public sector.
- **Leadership/management experience (2.3.5):** N/A.
- **Regional experience (2.3.6):** 3 years of experience in projects in South Africa, including collaboration with governmental or regulatory bodies.
- **Development cooperation (DC) experience (2.3.7):** N/A.
- **Other (2.3.8):** N/A.

5. Costing requirements

Assignment of personnel and travel expenses

Per diem allowances are reimbursed as a lump sum up to the maximum amounts permissible under the GIZ travel regulations.

Accommodation allowances are reimbursed as detailed in the specification of inputs below.

With special justification, additional Accommodation costs up to a reasonable amount can be reimbursed against evidence.

All business travel must be agreed in advance by the officer responsible for the project

Sustainability aspects for travel

GIZ has undertaken an obligation to reduce greenhouse gas emissions (CO₂ emissions) caused by travel. When preparing your tender, please incorporate options for reducing emissions, such as selecting the lowest-emission booking class (economy) and using means of transport, airlines and flight routes with a higher CO₂ efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO₂ emissions caused by air travel must be offset. GIZ specifies a budget for this, through which the carbon offsets can be settled against evidence.

There are many different providers in the market for emissions certificates, and they have different climate impact ambitions. The [Development and Climate Alliance \(German only\)](#) has published a [list of standards \(German only\)](#). GIZ recommends using the standards specified there.

Specification of inputs

Fee days	Number of experts	Number of days per expert	Total	Comments
Team Leader	1	20	20	
Key expert 1: Gender and Social Inclusion Expert	1	25	25	
Key expert 2: Junior Gender Expert	1	15	15	

Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	6	Undefined	6	Limited to experts travelling for steering project meetings, and stakeholder engagements.
Overnight accommodation in country of assignment	12 (4 nights for 3 experts)	3	12	Limited to experts travelling for project meetings, and stakeholder engagements.
Transport	Quantity	Number per expert	Total	Comments
Domestic flights	6 (2 return flights per expert)	3	6	Flights within the country of assignment during service delivery, limited to experts travelling for project meetings, and stakeholder engagements.
CO₂ compensation for air travel Link to working aid and table for determining the budget and Guidance for GIZ service providers on avoiding, reducing and offsetting GHG emissions on setting the budget.	12 (one-way)	3	12	A fixed budget of ZAR 13,892.40 is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) <ul style="list-style-type: none"> Kilometres travelled Airport transfers (Gautrain, Uber trips) 	500km at R4.84/km			Travel within the country of assignment for local trips for meetings, stakeholder engagements, airport transfers, etc.

6. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToR. In particular, the detailed structure of the concept (Chapter 3) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (Language).

The complete tender must not exceed 12 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered. The team must include at least one female expert for this assignment to ensure gender diversity.

The CVs of the personnel proposed in accordance with Chapter 4 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. g. The CVs can also be submitted in English (language).

NB: Please note that the submission of CVs alone does not meet the requirements of a personnel plan as required under Chapter 3.

Please calculate your financial tender based exactly on the parameters specified in Chapter 5 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule.

7. Option

After the services put out to tender have been completed, important elements of these tasks can be continued or extended. Specifically:

Type and Scope

Practical Implementation Support for Gender Mainstreaming

In addition to conducting the study, there is an opportunity to provide targeted support to NERSA in the practical implementation of the recommendations arising from both the audit that NERSA is currently conducting and this study. This optional workstream focuses on translating findings into actionable measures that advance gender mainstreaming within NERSA's policies, programmes, and institutional culture. The optional implementation support is critical to achieving long-term gender mainstreaming at NERSA.

NERSA will make all gender audit outputs available to inform this process and will actively support related initiatives. In alignment with these Terms of Reference, consultants may be required to extend their role beyond analysis and recommendation by actively facilitating the implementation of key gender-responsive interventions.

The contractor is responsible for providing the following optional services:

a) **Designing and delivering workshops or training sessions addressing identified gaps:**

This work will be informed by the findings of the gender audit NERSA is conducting, as well as the benchmarking study, which will highlight the specific gender-related gaps within NERSA's policies, practices, and organisational culture. The consultant will design and deliver targeted workshops or training sessions aimed at addressing these gaps, equipping NERSA staff with the necessary knowledge and skills to integrate gender considerations into their day-to-day operations and initiatives.

b) **Developing or refining policies, procedures, or operational guidelines for gender and diversity integration:**

Based on the results of the gender audit and benchmarking study, the consultant will assist NERSA in reviewing and refining its existing policies, procedures, and operational guidelines to better integrate gender and diversity considerations. This will ensure that NERSA's internal framework supports gender equality and diversity across all areas of its operations, from decision-making to policy implementation.

c) **Supporting strategic planning to embed gender sensitivity into NERSA's existing and future initiatives:**

Drawing from the outcomes of the gender audit and benchmarking study, the consultant will support NERSA in developing strategic plans to embed gender sensitivity into its existing and future initiatives. This will involve outlining actionable steps to integrate gender considerations into ongoing projects, as well as new initiatives, ensuring that gender equality is a central component of NERSA's strategic direction moving forward.

d) **Advising on communication and change management strategies for organisation-wide adoption of proposed measures:**

Based on the insights gained from the gender audit and benchmarking study, the consultant will provide guidance on communication and change management strategies to ensure the successful adoption of the proposed gender mainstreaming measures within NERSA. This will include developing a clear communication plan to raise awareness and build support, as well as providing change management strategies to ensure smooth, organisation-wide implementation and acceptance of the proposed gender-sensitive practices.

Deliverables for the optional services a, b, c and d:

- a) **Designing and delivering workshops or training sessions addressing identified gaps:** Deliverables include the design and delivery of tailored workshops or training sessions aimed at addressing specific gender-related gaps identified within NERSA.
- b) **Developing or refining policies, procedures, or operational guidelines for gender and diversity integration:** Deliverables include the development or refinement of gender and diversity policies, procedures, and operational guidelines that support integration within NERSA's operations.
- c) **Supporting strategic planning to embed gender sensitivity into NERSA's existing and future initiatives:** Deliverables include providing strategic support to embed gender sensitivity into NERSA's existing programs and future initiatives through actionable plans and recommendations.
- d) **Advising on communication and change management strategies for organisation-wide adoption of proposed measures:** Deliverables include providing expert advice on communication and change management strategies to ensure successful organisation-wide adoption of proposed gender mainstreaming measures.

Requirements/Prerequisite for exercising the option

Exercising the option will depend on the request from NERSA to translate the findings of this study as well as the findings of their Gender Audit into actionable activities. The decision on

continuation is expected to be made in the period **October 2025**. If the option is exercised, it is anticipated that the contract term will be extended to **September 2026**.

The option will be exercised by means of a contract extension on the basis of the individual approaches already offered

This optional support will be tailored to NERSA's specific organisational needs, ensuring that gender-responsive measures are effectively institutionalised and contribute to sustainable transformation.

This option is conditional upon NERSA formally requesting implementation support. If activated, consultants will be required to provide a revised work plan and budget reflecting the expanded scope. The budget for the implementation phase may be up to double the original allocation for the study. NERSA, GIZ and the consultants will mutually agree upon the revised deliverables, timelines, and associated costs before commencing this optional work.

Quantitative requirements for the optional services

Fee days	Number of experts	Number of days per expert	Total	Comments
Team Leader	1	20	20	
Key expert 1: Gender and Social Inclusion Expert	1	25	25	
Key expert 2: Junior Gender Expert	1	15	15	
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	6	Undefined	6	Limited to experts travelling for steering project meetings, and stakeholder engagements.
Overnight accommodation in country of assignment	12 (4 nights for 3 experts)	3	12	Limited to experts travelling for project meetings, and stakeholder engagements.
Transport	Quantity	Number per expert	Total	Comments
Domestic flights	6 (2 flights per expert)	3	6	Flights within the country of assignment during service delivery, limited to experts travelling for project meetings, and stakeholder engagements.

CO₂ compensation for air travel Link to working aid and table for determining the budget and Guidance for GIZ service providers on avoiding, reducing and offsetting GHG emissions on setting the budget.	4 (one-way)	3	12	A fixed budget of ZAR 13,892.40 is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) <ul style="list-style-type: none"> Kilometres travelled Airport transfers (Gautrain, Uber trips) 	500km at R4.84/km			Travel within the country of assignment for local trips for meetings, stakeholder engagements, airport transfers, etc.

Requirements on the format of the tender for the option

Please complete both spreadsheets in the price schedule, i.e. one for the main service and one for the optional service.