

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

CONFIDENTIAL

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**DIAGNOSTIC EVALUATION ON JUST TRANSITION INTERVENTIONS  
FOCUSSED ON MINE REHABILITATION AND POST-MINING  
REDEVELOPMENT IN MPUMALANGA**

**Project number/  
Scost centre:  
G-010101-001**

**Tender number**

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## **0. List of abbreviations**

AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
FK	Expert
FKT	Expert days
GTCC	General Terms and Conditions of Contract for supplying services and work
JET IP	Just Energy Transition Investment Plan
JET PMU	Just Energy Transition Project Management Unit in the Presidency of South Africa
KZFK	Short-term expert
MGCA	Mpumalanga Green Cluster Agency
SMME	Small, Medium, and Micro Enterprises
KZFK	Short-term expert
ToRs	Terms of reference

## 1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH in cooperation with the Just Energy Transition Project Management Unit (JET PMU) in the Presidency of South Africa, support South Africa's efforts in achieving a just transition to a low-carbon and climate resilient economy. The JET PMU was established by the Presidency of the Republic of South Africa in January 2023 to oversee the implementation of the Just Energy Transition Investment Plan (JET IP). The JET IP for the five-year period 2023-2027 sets out the scale of need and the investments required to achieve South Africa's decarbonisation commitments, in a manner that will deliver just outcomes for the people affected by the energy transition and that contributes to inclusive economic growth, energy security, and employment. The JET IP stems from the historic Just Energy Transition Partnership (JETP) formed at COP26 in 2021 between South Africa, France, Germany, United Kingdom, United States, and the European Union, and later joined by Denmark and the Netherlands who pledged to support transitioning South Africa's fossil fuel dependent economy in a just manner. The JET PMU was tasked with preparing the JET Implementation Plan 2023-2027 which was approved by Cabinet in November 2023 as roadmap for implementation of the JET IP.

The JET Implementation plan outlines several interventions and investments which are needed to transition South Africa into a low carbon and climate resilient economy across six portfolios: electricity; Mpumalanga just transition; new energy vehicles (NEVs); green hydrogen (GH<sub>2</sub>); skills; and municipalities. The JET Implementation Plan recognises the Mpumalanga province's central role and the need to direct investment towards economic diversification and support for communities and workers affected by the energy transition. The Mpumalanga Green Cluster Agency (MGCA) signed an MoU with the JET PMU in May 2025 to drive the implementation of the just energy transition in Mpumalanga. The MGCA is a non-profit company which was established as an independent entity in 2021 supported by the Mpumalanga Provincial government, as a triple helix cluster with representation from government, industry, and academia, to play a leading role in unlocking and unblocking economic opportunities in the green economy in Mpumalanga.

The Mpumalanga province is home to 80 percent of South Africa's coal-fired power plants and coal mines, making interventions that provide alternative livelihood options critical to supporting affected workers and communities. South Africa has a legacy of about 6,000 abandoned mines, and mine closure remains a significant and ongoing challenge due to systemic issues including ineffective use of mine rehabilitation funds. Mpumalanga has an estimated 800 derelict and ownerless mines which are a major cause of mine impacted water.

Unrehabilitated mines and mine waste dumps continue to pose serious environmental risks to land and water quality and present health hazards to surrounding communities. Currently, there are about 55 active coal mines operating in Mpumalanga, primarily in the Nkangala and Gert Sibande districts, with a significant number of mines expected to close by 2030 due to depleted coal resources and the transition to a low-carbon economy. Effective mine rehabilitation and post-mining redevelopment are essential to mitigating environmental and socio-economic impacts of coal industry downscaling while fostering new employment opportunities.

While potential opportunities for mine land rehabilitation and post-mining redevelopment, such as regenerative agriculture, have been identified, scalable implementation remain limited. To ensure a just transition in Mpumalanga, it is crucial to identify catalytic, sustainable and scalable project interventions, aligned policies, and the establishment of financing mechanisms to enable responsible mine closures, mine land rehabilitation and post-mining redevelopment.

The main objective of this assignment is to conduct a diagnostic evaluation to identify catalytic mine land rehabilitation and post-mining redevelopment projects (including pilots) and programmatic interventions that promote just transition outcomes in Mpumalanga and the mechanisms and/or levers required to achieve scale in line with the JET IP Mpumalanga Just Transition portfolio objectives. This could potentially lead to proactive programme design for mine rehabilitation and post-mining repurposing which can support communities, mine workers, SMMEs and municipalities at a regional scale.

## **2. Tasks to be performed by the contractor**

The contractor is tasked with conducting a diagnostic evaluation to identify scalable mine rehabilitation and post-mining redevelopment programmatic interventions and projects for coal regions/sites in Mpumalanga in line with the JET IP Mpumalanga Just Transition portfolio goals and objectives. This includes providing a clear understanding of the existing landscape, identifying gaps and challenges that need to be addressed, determining key opportunities for improvement or intervention, supporting strategic planning by guiding resource allocation and policy development, and establishing a foundation for monitoring and evaluation of future interventions. The diagnostic evaluation will involve a review of existing background documents and reports, and where necessary, insights should be validated through ground truthing with key sector experts or stakeholders. This assignment has been divided into two phases outlined below.

The contractor will be expected to execute the tasks under this diagnostic evaluation as follows:

#### **ACTIVITY 0: Inception Phase**

- Participate in the project inception meeting
- Draft inception report and revise the project plan based on consultations with key stakeholders, including JET PMU, MGCA and other relevant stakeholders.
- The inception report should include minutes of the meeting and a stakeholder engagement plan

#### **PHASE 1**

##### **ACTIVITY 1: Data Collection & Preliminary Analysis**

- Document Collation: Gather relevant reports and studies on economic and livelihood opportunities associated with mine rehabilitation and post mining redevelopment in Mpumalanga (Nkangala and Gert Sibande Districts).
- Desktop Review: Identify key characteristics of mine rehabilitation and post-mining redevelopment for coal-regions in Mpumalanga that consider best practices and innovative solutions, and the factors that either enable or hinder economic and livelihood opportunities including identifying:
  - Barriers to investment: Based on existing research and pilot-studies, identify the key obstacles preventing public and private sector investment and collaboration in catalytic interventions with high potential for local economic development (LED), broad based black economic empowerment (BBBEE), job creation, livelihoods and supporting the wellbeing of communities at a regional scale.
  - Enabling conditions: Identify measures that government, mine owners and other stakeholders can implement to remove barriers and incentivize investment at scale.
- Beneficiary Mapping: Determine the key beneficiary groups, and the types of interventions that would be most impactful for different stakeholders (e.g. SMMEs', communities, former mine workers and municipalities)

##### **ACTIVITY 2: Identifying key programmatic interventions**

- Intervention Selection: Identify five potential programmatic interventions and projects that could unlock private sector investment at scale and create sustainable employment.
- Consider diverse models such as:
  - Regenerative agriculture initiatives linked to mine rehabilitation and post-mining redevelopment.
  - Circular economy projects that leverage local resources and coal mine waste streams.
  - SMME development initiatives supporting new business opportunities in mine waste re-use, mine rehabilitation and post-mining redevelopment.
- Stakeholder alignment on selected interventions: Secure agreement with JET PMU, MGCA and key stakeholders on five high-potential programmatic interventions that can be scaled.

## PHASE 2

### ACTIVITY 3: Intervention Analysis & Structuring

For each of the five selected interventions from Activity 2, conduct a **detailed analysis and outline** covering:

**Table 1: List of the diagnostic evaluation criteria for the selected mine rehabilitation and post-mining interventions**

<b>Analysis criteria</b>	<b>Objective</b>
<b>Scale and scope</b>	Define the potential reach and impact of the intervention and detail how the intervention is addressing mine rehabilitation and post-mining redevelopment
<b>Impact Analysis</b>	Assess job creation potential, livelihood improvements, and co-benefits for different beneficiary groups.
<b>Opportunities &amp; Strengths</b>	Identify existing resources, expertise, and insights that could be leveraged.
<b>Challenges &amp; Gaps</b>	Highlight weaknesses or barriers that need to be addressed.

<b>Implementation facilitation Strategy</b>	Outline how each intervention could be practically implemented, including what enabling environment would be needed at micro/meso/macro levels to support operating at scale and the short-term actions required to build momentum
<b>Implementation timelines</b>	Establish estimated implementation timelines.
<b>Scalability Mechanisms</b>	Define the levers and mechanisms required for large-scale deployment
<b>Stakeholder roles and responsibilities</b>	Specify the various stakeholder roles and responsibilities (e.g. roles of mining companies, municipalities, government and other stakeholders)
<b>Cost Estimation</b>	Provide an approximate investment required per intervention.
<b>Community Engagement strategy</b>	Identify and outline strategies for meaningful participation of local communities.

#### **ACTIVITY 4: Validation & Stakeholder Engagement**

- Reality Test: Present findings to sector experts and key stakeholders through a roundtable engagement session for validation and feedback.
- Draft Report: Develop a comprehensive draft report incorporating stakeholder input.

#### **ACTIVITY 5: Finalisation & Reporting**

- Feedback Integration: Review and incorporate comments from stakeholders.
- Final Report Submission: Deliver the refined final report, ready for dissemination and potential next steps.

**Furthermore;**

- The contractor is responsible for selecting, preparing, training and steering the, short and long-term experts assigned to perform the advisory tasks.
- The contractor provides equipment and supplies (consumables) and assumes the associated operating and administrative costs.
- The contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of GIZ.
- The contractor reports regularly to GIZ in accordance with the current GTCC (General Terms and Conditions of Contract for supplying services and work) of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.

In addition to the reports required by GIZ in accordance with the GTCC, the contractor submits the following reports:

- Inception report
- Analysis report
- Report on all the identified mine rehabilitation and post-mining redevelopment interventions
- Final assessment of the selected interventions and implementation plans
- Project management Meeting minutes and reports
- Workshop and comment tracking report
- All reports defined as deliverables set out in Section 2 and the milestones table below

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

<b>Milestones/partial works</b>	<b>Date/location/responsibility</b>	<b>Criteria for acceptance</b>
<b>Project inception</b>		
Inception report	2 weeks after inception meeting	Inception report
Detailed timeline of how deliverables will be achieved within expected timeframe	2 weeks after inception meeting	Project schedule/plan presented to the relevant project stakeholders
<b>PHASE 1</b>		
Initial analysis	4 weeks after inception meeting	Summary presentation
Identification of potential interventions to focus on.	4 weeks after inception meeting	Agreement with JET PMU and relevant stakeholders

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**PHASE 2**

Detailed evaluation for each identified intervention covering scale, cost, impact, and implementation strategy and other criteria from <b>Table 1</b>	8 weeks after inception meeting	Summary report
Stakeholder engagement and feedback from sector experts/ local stakeholders	8 weeks after inception meeting	Summary presentation and schedule of engagements with the relevant stakeholders
Submission of first draft report	10 weeks after inception meeting	Draft report
Feedback and refinement	10 weeks	
Second draft submission	12 weeks after inception meeting	Draft report
Final feedback and refinement	12 weeks	

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**Project close out**

Final submission	14 weeks after inception meeting.	Final report
Close out Meeting	14 weeks after inception meeting.	
Close out Report	14 weeks after inception meeting.	

Period of assignment: from **20 May 2026 until 31 December 2026**.

The table of milestones above provides an indication of the default timeline. All expert days must be planned against the above milestone timeline and tasks contained in Section 2.

**3. Concept**

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 2 (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 present and explain its approach to **steering** the measures with the project partners (1.3.1) and its contribution to the **results-based monitoring system** (1.3.2).

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).

The tenderer is required to describe its contribution to knowledge management for the partner (1.5.1) and GIZ and to promote scaling-up effects (1.5.2) under **learning and innovation**.

## **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.

#### **4. Personnel concept**

The tenderer is required to provide personnel who are suited to filling the positions described, on the basis of their CVs (see Chapter 7), the range of tasks involved and the required qualifications.

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 (quality and deadlines)
- Coordinating and ensuring communication with GIZ, partners and others involved in the project
- Personnel management, in particular identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines

###### Qualifications of the team leader

- Education/training (2.1.1): Post-graduate degree in Environmental Sciences/Management, Environmental Economics, Engineering, Sustainable Development.
- Language (2.1.2): C2-level language proficiency in English in terms of the Common European Framework of Reference (CEFR) for Languages.
- General professional experience (2.1.3): 15 years of professional experience of which:
  - 8 years of professional experience in environmental, social and governance assessments of mining operations
  - 7 years of professional experience in stakeholder engagement and stakeholder management in the field of mining and sustainability, and a well-established network within the mining sector.
- Specific professional experience (2.1.4): 5 years working on mine closure and rehabilitation strategies
- Leadership/management experience (2.1.5): 5 years of management/leadership experience as project team leader or manager in a company

- Regional experience (2.1.6): 10 years of working experience in projects in Southern Africa, of which 5 years in projects in South Africa.
- Development Cooperation Experience (2.1.7): N/A
- Other (2.1.8): 5 years' experience working on projects related to the nexus between mining, land and water in South Africa, with an extensive network of fellow practitioners and information in South Africa, and where relevant internationally.

## **Key expert 1**

### Tasks of key expert 1

- Technical responsibility for content development of tasks described in section 2 relevant to mine rehabilitation and post-mining redevelopment
- Facilitation and planning of stakeholder consultations

### Qualifications of key expert 1

- Education/training (2.2.1): Post-graduate degree in Environmental Sciences/Management, Environmental Economics, Engineering, Sustainable Development.
- Language (2.2.2): C2 -level language proficiency English in terms of the Common European Framework of Reference (CEFR) for Languages.
- General professional experience (2.2.3): 10 years of professional experience of which:
  - 5 years of professional experience in environmental, economic, financial, social and governance evaluations and assessments in resource sectors
  - 3 years of experience in stakeholder coordination and consultation, client relation understanding, and management skills for both non-governmental and governmental stakeholders.
  - 2 years of experience on sustainable development topics
- Specific professional experience (2.2.4): 5 years working on complex monitoring and evaluation assessments; stakeholder consultation and management, and research with a minimum of 3 evaluations completed.
- Leadership/management experience (2.2.5): 2 years project management experience and skills
- Regional experience (2.2.6): 5 years of working experience in projects in Southern Africa, of which 3 years in projects in South Africa, with experience conducting evaluations using the Department of Planning, Monitoring and Evaluation (DPME) national evaluation system.

- Development Cooperation Experience (2.2.7): N/A
- Other (2.2.8):
  - 3 years' experience working on projects related to the nexus between mining, land and water in South Africa, with an extensive network of fellow practitioners and information in South Africa, and where relevant internationally.

#### Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills
- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

### **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 tax law for each country as set out in the country table in the circular from the German Federal Ministry of Finance on travel expense remuneration (downloadable from the [German Federal Ministry of Finance – tax treatment of travel expenses and allowances for international business travel as of 1 January 2026 \(GERMAN ONLY\)](#)).

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 (CO<sub>2</sub> 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 CO<sub>2</sub> efficiency. For short distances, travel by train (second class) or e-mobility should be the preferred option.

CO<sub>2</sub> 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 Lead	1	50	50	The expert is afforded 50 days for implementation
Expert 1	1	60	60	The expert is afforded 60 days for implementation
Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	2	4	8	Up to 2 days per diem for 2 trips for each of the 2 experts
Overnight allowance in country of assignment	2	4	8	
Transport	Quantity	Number per expert	Total	Comments
Domestic flights	2	4	8	Up to 2 return flights for 2 trips for each of the 2 experts
CO <sub>2</sub> compensation for air travel	8			A budget is earmarked for settling carbon offsets against evidence. <b>(Mandatory)</b>

<a href="#"><u>Guidance for GIZ service providers on avoiding, reducing and offsetting GHG emissions</u></a>				
<b>Travel expenses (train, car)</b> • Car hire		4	8	Car hire up to 8 days for travel
<b>Other travel expenses</b>				<p>This is mileage for the use of own vehicle against reimbursable evidence with a limit of up to 1 000km at ZAR 4.76 per km.</p> <p>A budget for travel costs such as uber or bolt, against mileage claims with use of private vehicle, train, car hire, etc</p> <p>Provision for other travel expenses (E-toll, toll gates Parking, etc.) where relevant should be planned against proof</p>

### Workshops, events and trainings

The contractor implements the following workshops:

- 1 stakeholder roundtable engagement workshop session to present the findings to relevant stakeholders in Mpumalanga (approximately 30 people)

All professional fees and costs for facilitating the workshops (including travel costs) must be included in the budget. All other logistical costs for the roundtable stakeholder engagement session (venue and catering) will be organised and covered by GIZ and the relevant project stakeholders.

### 6. Inputs of GIZ or other actors

GIZ and/or other actors, including Just Energy Transition Project Management Unit in the Presidency (JET PMU) and the Mpumalanga Green Cluster Agency (MGCA), are expected to make the following available:

- Relevant information to support the assignment, including key mine rehabilitation and post-mining redevelopment documents (policies, strategies, and any programmes, or projects documents)
- Meeting room at the GIZ offices in Pretoria, JET PMU offices in Johannesburg or MGCA offices in Mpumalanga.
- Venue and catering for the roundtable stakeholder engagement session in Mpumalanga

## **7. 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 10 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 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. The CVs can also be submitted in English (language).

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.