

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

CONFIDENTIAL

Design and Establishment of a Green Investment Facilitation One Stop Shop for the Mpumalanga Green Cluster Agency (MGCA)	Project number/ cost centre: G-011971-001
	Tender number 10055658

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0. List of abbreviations

AA	Federal Foreign Office
AG	Commissioning party
AN	Contractor
AVB	General Terms and Conditions of Contract for supplying services and work
BMUKN	German Federal Ministry for the Environment, Climate Action, Nature Conservation and Nuclear Safety
CRM	Case Relationship Management
EIAs	Environmental Impact Assessments
FK	Expert
FKT	Expert days
IKI	International Climate Initiative
ICT	Information and Communication Technology
IPP	Independent Power Producer
JUST SA	Just Transition to a Decarbonised Economy for South Africa
KZFK	Short-term expert
MGCA	Mpumalanga Green Cluster Agency
MEGA	Mpumalanga Economic Growth Agency
NERSA	National Energy Regulator of South Africa
OSS	One-Stop-Shop
SOP	Standard Operating Procedures
ToRs	Terms of reference

1. Context

The Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH is an international cooperation enterprise for sustainable development with worldwide operations. Its corporate objective is to improve people's living conditions on a sustainable basis.

The International Climate Initiative (IKI) is the key instrument of the German government, led by the Federal Ministry for Environment, Climate Action, Nature Conservation and Nuclear Safety (BMUKN) with cooperation of the Federal Foreign Office (AA), for the international financing of climate change mitigation and biodiversity. Under the IKI, the German government is closely cooperating with the South African (SA) government, a core partner country. The Just Transition to a Decarbonised Economy for South Africa (JUST SA) project is funded by the IKI through the BMUKN.

JUST SA supports the implementation of pathways towards a Just Transition to a low-carbon economy and climate resilient society taking a multi-level approach. At national level, the project contributes to the implementation of key policy documents and facilitates dialogue for and information sharing to multiple stakeholders, ensuring an inclusive and results-oriented process. At provincial level, the project assists stakeholders in Mpumalanga in initiating alternative development pathways for a diversified regional economy and capacitates targeted SMMEs to unlock their growth potential and receive access to finance. At local level, activities towards a just transition are set up in selected local municipalities and affected communities and marginalized groups empowered with inclusive bottom-up approaches to community development. Furthermore, solutions to sustainably rehabilitate coal mining land and water are sought through research, policy implementation and community engagement.

The Mpumalanga Green Cluster Agency (MGCA) is a provincial entity mandated to drive Mpumalanga's transition towards a low-carbon, inclusive and sustainable economy. As the province's primary green investment promotion and facilitation body, MGCA is responsible for creating an enabling environment for investors, coordinating across government institutions, and ensuring that green investment projects are unlocked and implemented efficiently. Despite the province's competitive advantages, including abundant natural resources, a strategic location and a growing green economy pipeline, investors and project developers continue to face fragmented support services, complex and time-consuming permitting processes (particularly for Environmental Impact Assessments, water use licences, land use and zoning, and energy-related authorisations), limited coordination between provincial and national entities, and weak investor aftercare.

MGCA is therefore establishing a Green Investment Facilitation One Stop Shop to act as a centralised coordination mechanism that streamlines engagement and improves the efficiency, predictability and transparency of the investor journey, while building on and linking to existing One Stop Shops and Help Desks in the public sector rather than duplicating them. Mpumalanga is South Africa's coal heartland and one of the country's priority just transition regions, so removing structural barriers to green investment there speaks directly to the aims of the just transition: it helps redirect capital and jobs into low-carbon, inclusive economic activity in a province whose economy and workforce are most exposed to the shift away from coal. A well-functioning Investment One Stop Shop (OSS) on green industrial initiatives such as renewable energy etc, supports the broader objective of enabling a socially just and economically sound transition by making it easier for green investment, and the associated decent jobs, to actually materialise on the ground rather than stalling in regulatory bottlenecks.

2. Tasks to be performed by the contractor

Joint Implementation Principle

- All activities under this assignment shall be designed and delivered jointly with MGCA and not produced independently by the service provider for later hand-over. The service provider shall work in an embedded, co-creative mode with a designated MGCA counterpart team throughout the assignment, so that MGCA staff are capacitated to own, adapt, and operate the OSS from the outset rather than only at close-out.
- A core MGCA counterpart team (minimum two staff, including at least one member intended to operate the OSS long-term) shall be nominated at inception and involved in every activity below.
- Each major deliverable (1–5) shall pass through a joint working session and a formal MGCA validation and sign-off step before being considered final, not only at the point of handover.
- Draft outputs shall be shared with MGCA for structured review and comment at defined checkpoints (not only as finished drafts), and MGCA feedback shall be documented and demonstrably incorporated.
- The service provider shall document, at each stage, which parts of the work were produced jointly with MGCA and which capacity-building activities (co-drafting, shadowing, working sessions) took place, as part of progress reporting to GIZ.

Diagnose the Green Investment Facilitation Landscape

- Diagnose the green industrial initiatives investment facilitation landscape in Mpumalanga, leveraging on the National landscape, including regulatory bottlenecks and process gaps across the project development lifecycle.
- This diagnostic shall be conducted jointly with the MGCA counterpart team, including joint stakeholder interviews and joint interpretation of findings, so that MGCA builds first-hand familiarity with the regulatory landscape rather than receiving a finished diagnostic report.
- Perform peer-engagements with DTIC InvestSA Energy One Stop Shop and MEGA to better understanding existing capabilities, lessons learnt on operating One Stop Shops, an ensuring there are no duplications but rather collaboration and enhancement of capabilities to enable an effective green investment environment in Mpumalanga.

Design Fit-for-Purpose Processes, SOPs, and Frameworks

- Design fit-for-purpose processes, SOPs, frameworks and coordination mechanisms for a Green Investment Facilitation One Stop Shop, including a permit tracking matrix, case management framework, investor toolkit and digital systems (CRM/case management) specification.
- All frameworks, SOPs and tools shall be co-drafted with MGCA staff through structured working sessions (not delivered as a finished package), with MGCA input actively sought on process design choices, terminology, and workflow fit to MGCA's operating context.
- Draft SOPs and frameworks shall be pilot-tested with MGCA staff performing the process steps themselves under guidance, with results used to refine the design before finalisation.

Structured Transitional Handover, Capacitation and Training

- Provide a structured transitional handover, capacitation and training to MGCA staff so that MGCA is able to operate and manage the OSS independently once the assignment concludes.
- Handover shall be treated as a continuous, cumulative process running throughout the assignment, building on the joint work under Sections 1 and 2 rather than a single event at the end of the contract term.
- Training shall include a practical, supervised period in which MGCA staff operate the OSS processes and tools themselves, with the service provider in an advisory and coaching role, prior to full independent operation.

Key deliverables include:

1. End-to-End Project Development Process Mapping

The service provider will develop a detailed, practical, and standardised end-to-end process map for green economy, green industrial initiatives and infrastructure projects in Mpumalanga, enabling projects to progress efficiently from concept to implementation readiness. The mapping must be grounded in current South African regulatory frameworks and informed by engagement with relevant stakeholders, including, DTIC InvestSA Energy One Stop Shop, MEGA, project developers, permitting authorities, and implementing agencies.

This will include, developed jointly with the MGCA counterpart team through working sessions and validated by MGCA before finalisation:

- A phased project development framework covering:
 - Project concept and pre-feasibility
 - Feasibility and site selection
 - Stakeholder and community engagement
 - Permitting and regulatory approvals
 - Project commercial closeout
 - Implementation readiness
 - Construction and implementation
- A comprehensive mapping of all regulatory and permitting requirements at each stage, including:
 - Environmental approvals (EIAs, Basic Assessments)
 - Land use and zoning approvals
 - Water Use Licences
 - Grid connection and energy-related approvals
 - Sector-specific licences
- For each permit and approval:
 - Responsible authority/department
 - Application requirements and submission points
 - Appropriate submission stage within the project lifecycle
 - Indicative timelines (statutory vs. typical practice)
 - Key dependencies and sequencing requirements
- For regulators and authorities
 - Standard committee structure and composition
 - Annual sitting calendar (scheduled seating dates)

- Available escalation processes for bringing matters before the committees (if applicable)

2. Bottleneck and Delay Analysis

The service provider will conduct a targeted, stakeholder-informed analysis of the regulatory and permitting environment of green industrial initiatives to identify:

- Key bottlenecks and delays across the project development lifecycle
- Sequencing misalignments across regulatory processes (parallel vs. sequential approvals)
- Institutional and coordination gaps affecting project progression
- Critical risk points that commonly delay or prevent projects from reaching implementation readiness
- Developer and project-owner practices that contribute to regulatory delays or bottlenecks (e.g. application quality, compliance readiness, sequencing of submissions) The analysis must clearly distinguish between:
 - Regulatory and policy-related constraints
 - Administrative, procedural, and coordination inefficiencies
 - Findings shall be jointly reviewed and sense-checked with MGCA staff, drawing on their institutional knowledge, before conclusions are finalised, and shall be presented in a joint working session rather than only as a written report.

3. Standardised Facilitation Frameworks and Templates

The service provider will develop practical, standardised frameworks and templates, not built systems, to enable MGCA to support, track, and facilitate investment projects. This will include:

- A project intake and case management framework
- A stage-gate aligned pipeline tracking template
- A permit tracking matrix template covering:
 - Required approvals and responsible authorities
 - Indicative timelines
 - Status tracking structure
- SOPs for:
 - Investor/project onboarding
 - Case tracking and updates
 - Intergovernmental coordination and escalation
 - Including ways of collaborating with the InvestSA Energy One Stop Shop and MEGA
 - Issue identification and resolution
- A reporting and monitoring framework including:
 - Standard dashboard templates (weekly/monthly)
 - Escalation structures for delayed or stalled projects
- All templates and SOPs under this section shall be co-designed with MGCA staff and tested by MGCA staff on at least one real or simulated case before being finalised, to confirm usability and fit with MGCA's actual workflow.

4. Investor and Project Support Toolkit

The service provider will develop an investor-facing toolkit serving as the practical counterpart to the internal frameworks under 1 and 3, this will include:

- A step-by-step regulatory and permitting guide for green economy projects and green industrial initiatives e.g. renewable energy
- Standardised permit application checklists by project stage
- Stage-aligned decision-support tools
- Practical guidance notes on common risks and constraints (e.g. land access, grid capacity, water availability, environmental approvals)
- MGCA staff shall co-author the guidance notes and checklists together with the service provider, contributing local and institutional knowledge, so that the toolkit reflects language and examples MGCA staff can credibly maintain and update going forward.

5. Digital Systems Architecture

The service provider will design the digital infrastructure required to support the Green Investment OSS operations, including:

- A case management and investor tracking system (CRM or equivalent) to manage investor interactions, project status, and approval timelines.
- A virtual OSS platform, an investor-facing digital portal providing information, service requests, document submission, and status tracking functionality.
- Data management and reporting frameworks to enable real-time monitoring of investor pipeline and performance metrics.
- Integration requirements with existing government systems where feasible.
- The system specification shall be developed jointly with MGCA's designated ICT/operations focal point, with requirements gathered directly from MGCA staff and configuration choices explained and validated with them, so that MGCA can credibly manage or commission ongoing maintenance of the system.
- Engagement with the Invest SA Energy One Stop Shop, together with MGCA, to draw on lessons learnt from building and operating its digital system.

6. Handover and Capacity Embedding

The service provider will ensure that all frameworks, templates, and tools developed under this scope are effectively transferred to and embedded within MGCA for independent use. This will include:

- A structured handover process covering all deliverables across 1 to 5
- Capacitation sessions with relevant MGCA staff on the use and application of all frameworks and tools
- A concise user guide for each key deliverable, enabling MGCA staff to apply, update, and maintain the tools without ongoing service provider support
- A handover report summarising all deliverables, their intended use, and recommended next steps for operationalisation
- A cumulative record of joint working sessions, co-drafting activities, and MGCA signoffs conducted throughout the assignment, demonstrating that capacitation was built progressively and not only delivered at close-out.

- A supervised operational period in which MGCA staff run the One Stop Shop processes with the service provider in a coaching and advisory role only, prior to the final handover report.

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 AVB of the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH.
- The contractor's progress reports to GIZ shall explicitly describe how MGCA was involved in each activity during the reporting period (joint sessions held, deliverables co-developed, MGCA feedback incorporated).

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

Milestones/process steps/partial services	Deadline/place/person responsible
Inception Report	2 weeks after inception meeting
Diagnostic & Roadmap	Week 6 after inception meeting
One Stop Shop Framework (SOPs, investor journey map, service standards, escalation protocols, case management templates)	Week 15 after inception meeting
ICT/ CRM System Specification and Configuration Blueprint	Week 17 after inception meeting
CRM Configuration (building phase)	Week 21 after inception meeting
Staff Capacitation Plan	Week 22 after inception meeting
Pilot and testing	Week 24 after inception meeting
Handover Report	Week 26 after inception meeting

Period of assignment: from 28 October 2026 until 21 May 2027.

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.

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 3.1 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

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): university degree in economics, development economics, and regional planning
- Language (2.1.2): C1-level language proficiency in English
- General professional experience (2.1.3): 8 years of professional experience in the Green Economy sector and green industrial initiatives
- Specific professional experience (2.1.4): 5 years in organisational development
- Leadership/management experience (2.1.5): 5 years of management experience as project team leader or manager in a company
- Regional experience (2.1.6): 3 years of experience in projects in Southern Africa, of which 2 years in projects in South Africa
- Development cooperation (DC) experience (2.1.7): 2 years of experience in DC projects
- Other (2.1.8): N/A

Key expert 1

Tasks of key expert 1

- Design SOPs, governance frameworks and coordination mechanisms for the Help Desk, and lead the mapping of end-to-end project development and permitting requirements for green economy projects in Mpumalanga
- Conduct the bottleneck and delay analysis across the regulatory and permitting environment and translate findings into practical facilitation frameworks, templates and an investor-facing toolkit

Qualifications of key expert 1

- Education/training (2.2.1): University degree in law, public administration, engineering, environmental management
- Language (2.2.2): C1 -level language proficiency in English
- General professional experience (2.2.3): 8 years of professional experience in governance and institutional systems design
- Specific professional experience (2.2.4): 5 years of professional experience in regulatory and permitting experience, design of SOPs and coordination frameworks for public sector platforms
- Leadership/management experience (2.2.5): N/A
- Regional experience (2.2.6): 3 years of experience working in the Southern African Region
- Development Cooperation (DC) experience (2.2.7): 2 years of experience working in development corporation projects
- Other (2.2.8): N/A

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

Short-term expert pool with minimum 2, maximum 4 members

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member (see below Chapter 7 Requirements on the format of the bid) for the assessment.

Tasks of the short-term expert pool

- Provide regulatory, permitting and ICT/CRM systems design inputs to support the diagnostic, framework design and digital systems specification
- Support stakeholder engagement, testing and skills-transfer sessions with MGCA staff during the framework review and handover phase
- EIA/ Basic Assessment/ environmental authorisations for green economy and energy projects (IEBP-registered or equivalent)
- End-to-end green economy/ infrastructure project development, permitting requirements, and critical path planning
- Environmental and administrative law; permit refusals, regulatory appeals, and legal interpretation of permit conditions
- NERSA registration/ licensing, Electricity Regulation Act, grid connection, and IPP regulatory processes

Qualifications of the short-term expert pool

- Education/training (2.6.1): 1 expert with university qualification in IT, Computer Sciences or ICT systems development, 1 expert with university qualification in Environmental law or Environmental management
- Language (2.6.2): 2 experts with C1-level language proficiency in English
- General professional experience (2.6.3): 1 expert with 5 years of professional experience in the IT sector, 1 expert with 5 years of professional experience in the regulatory and permitting sector
- Specific professional experience (2.6.4): 1 expert with 3 years of professional experience in CRM and case management system design and configuration, 1 expert with 3 years of professional experience in South African environmental, land use, water, and energy regulatory processes; project development roadmap design
- Regional experience (2.6.5): 2 experts with 5 years of experience in Southern Africa (region)
- Development cooperation (DC) experience (2.6.6): n/a
- Other (2.6.7): n/a

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

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 (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
Designation of TL	1	40	40	
Designation of key expert	1	40	40	
<i>Designation of short-term expert pool</i>	2	30	60	

Travel expenses	Quantity	Number per expert	Total	Comments
Per-diem allowance in country of assignment	4	20	80	
Overnight allowance in country of assignment	4	10	40	
Transport	Quantity	Number per expert	Total	Comments
International flights	n/a	n/a	n/a	Travel to the place of service delivery
Domestic flights	4	2	8	Flights within the country of assignment during service delivery
CO ₂ 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.			1	A fixed budget of ZAR 9134,40 is earmarked for settling carbon offsets against evidence.
Travel expenses (train, car) • Car rental	4	20	80	Travel within the country of assignment, transfer to/from airport etc.

6. Inputs of GIZ or other actors

GIZ and/or other actors, including the Mpumalanga Green Cluster Agency are expected to make the following available:

- Relevant information to support the assignment
- Meeting room at the GIZ offices in Pretoria or meeting room at the MGCA Offices in Middelburg in Mpumalanga

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.