

South Africa-UK PACT

Terms of Reference: climate strategy and clean energy

Project 1: Updating the National Employment and Vulnerability Assessment (NEVA) and developing a dynamic online NEVA platform

Grant value:

Up to £500,000 per project per financial year (Apr-Mar)

Project duration:

15 – 18 months, assumed to start in February 2025.

Deadline for submission of applications:

23 October 2024, 17:00 SAST/ 15:00 UTC

Apply through Call for Proposals web page:

www.ukpact.co.uk/south-africa-cfp-climate-strategy-and-clean-energy

The UK and South Africa have committed to work together to accelerate action on climate change while creating green jobs. To support this partnership, the UK Government is looking to extend its UK Partnering for Accelerated Climate Transitions (UK PACT) programme in South Africa with technical assistance and capacity-building projects supporting the climate strategy and clean energy sectors.

This call for proposals aims to support activities which are strategically aligned to national priorities on climate change mitigation and key policy areas identified through consultations with government counterparts.

What is South Africa-UK PACT?

UK PACT is a unique capacity-building programme. Jointly governed and funded by the UK Government's Foreign, Commonwealth and Development Office (FCDO) and the Department for Energy Security and Net Zero (DESNZ) through the UK's International Climate Finance, it works in partnership with countries with high emissions reduction potential to support them to implement and increase their ambitions for tackling climate change.

UK PACT forms a key part of the UK's technical assistance offer under the Just Energy Transition Partnership (JETP). This agreement was announced at COP26, in which the UK, alongside France, Germany, the European Union and the United States pledged US\$8.5 billion to support the Government of South Africa's plans on climate action and energy transition.



What is UK PACT already funding?

UK PACT has been partnering with South Africa since June 2020 to support the acceleration of the just transition and low-carbon economic recovery after the COVID-19 pandemic. Previous and ongoing UK PACT projects in South Africa include:

- Supporting sectoral modelling research for the evidence base South Africa used to inform its decision to submit an enhanced NDC;
- Supporting municipalities to procure the services of independent power producers;
- Assisting eThekweni municipality with designing a regional hydrogen economy strategy;
- Stimulating the growth of an embedded energy generation initiative in intermediary municipalities.

Further information on previous and ongoing projects can be found on the [South Africa-UK PACT web page](#).



What are we looking for?

As a demand-led programme, the South Africa-UK PACT Country Fund aims to align its support with the Government of South Africa's existing plans and policies. Through consultation with the Government of South Africa, UK PACT has identified key opportunities in climate strategy and policy and clean energy. We are looking to award grant funding for projects aimed at providing technical assistance and capacity-building to support a just transition.

You are currently looking at the following opportunity identified for funding within this call for proposals:

- **Project 1:** Updating the National Employment and Vulnerability Assessment (NEVA) and developing a dynamic online NEVA platform, supporting the DFFE

These distinct projects have been identified as the targeted interventions for the receipt of funding. Each of these projects has a number of specific expected outputs and interventions. We welcome creativity, expansion and additional suggestions from the market, but ask that applicants ensure that their applications cover the stated interventions as a minimum to ensure eligibility of their proposals.

Terms of Reference for Project 1

Updating the National Employment and Vulnerability Assessment (NEVA) and developing a dynamic online NEVA platform

Government counterpart:

This project seeks to support the Department of Forestry, Fisheries and the Environment (DFFE). It will be funded by UK PACT in support of the DFFE's technical assistance requirements.

The British High Commission Pretoria is leading government engagement for this Call for Proposals. The proposed project is the result of intensive consultation with the Government of South Africa. To avoid confusion with government counterparts, we therefore do not encourage applicants to have direct engagement with government on this project during the application process or prior to receiving an award.

Thematic area:

Climate strategy and policy

Project description

Background

The National Employment and Vulnerability Assessment (NEVA) and the Sector Jobs Resilience Plans (SJRPs) policy instruments are key just transition plans and tools that are intended to protect vulnerable groups that may lose their jobs or livelihoods because of climate change impacts and the effects of the energy transition, and maximise new opportunities. The NEVA assesses the climate change and transition impacts on jobs, while the SJRPs protect vulnerable communities to safeguard their income and livelihoods through transitioning to more sustainable sources. The NEVA and SJRPs were developed in 2019 for implementation. These policy instruments have helped to identify and prioritise projects for implementation in the five value chains affected by climate change and the transition; namely, coal, metals, transport, agriculture, and tourism value chains. Since the publication of the first NEVA and SJRPs, there have been numerous policy developments in the country including the approval of the Just Transition Framework by the South African Government.

The first NEVA assessment was informed by indicators and datasets up to 2018. There is now a need to update the current NEVA, to ensure that it is informed by the latest Statistics South Africa (STATS SA) Labour Market Dynamics Surveys and current climate change related indicators. Updating the NEVA will enhance interventions to enable a pro-jobs approach in the climate change response measures contained in the SJRPs. There is also a need to enable dynamic functionality for the NEVA. A dynamic online NEVA platform will support efficient and effective tracking of all dimensions of vulnerability and jobs on a systematic basis to inform policy and decision-making processes.

Project description

Aims and objectives

The primary objectives of the project are to update the NEVA based on recent data sets and to establish an online dynamic platform to inform use cases for the NEVA and SJRPs.

Objective 1: To update the NEVA with the latest published datasets by STATS SA (and potentially other relevant data) and to incorporate new climate change related indicators in the report.

- The updated NEVA will serve a five-year period (2025-2029) and will align with the National Development Plan (Vision 2030) imperatives to eradicate poverty, address inequality and reduce unemployment by 2030.
- The DFFE is the primary custodian of the NEVA, utilising the NEVA to support policy and decision-making process towards a just transition. The NEVA will also provide an evidence base to other stakeholders, such as the Presidential Climate Commission (PCC) and civil society.

Objective 2: To translate the NEVA into a dynamic online platform with the ability to track vulnerability indicators to enable real time decision-making. It is envisaged that the NEVA platform will integrate with other national, government, and opensource climate and socio-economic platforms and databases to enable systematic tracking and updating of the NEVA with regards to job gains and losses across the five value chains of the SJRPs.

- The dynamic NEVA will form part of the National Climate Change Information System (NCCIS) and indicators defined in the NEVA will be tracked as part of the NCCIS. These indicators will inform the JET IP and Just Transition Framework Monitoring and Learning systems coordinated by the JET IP Project Implementation Unit. The DFFE, PCC and other stakeholders (including civil society) will use the dynamic system to track the evolving effects of climate change and the transition on jobs, livelihoods, and communities.

Key activities:

Activity 1: Updating of the NEVA

- Outline the regulatory framework necessary for the updating and operationalisation of the NEVA.
- Conduct an updated analysis of the potential impacts of climate change and the transition on vulnerable groups in each value chain (coal, metals, transport, agriculture, and tourism), including the impacts on women, youth, people with disabilities, and other groups affected by marginalisation.
- Update major statistical trends (sales, value add and exports, profitability, employment, ownership and control, etc.) in the five value chains.

- The primary statistical resource used for informing the 1st NEVA was the General Household Survey and the Labour Market Dynamics Survey published in 2018, and the updated NEVA will be informed by the latest Labour Market Dynamics Survey conducted in 2021 by STATS SA. The updated assessment should be informed by latest source datasets, including the national statistical accounts; national labour force surveys; market studies and market data; statements of public policy, strategy and investment; research reports on environmental, employment and social issues; and social accounting matrices and model updates, as well as other relevant data.
- Incorporate new indicator datasets and provide in-depth insight into the value chains.
- Understand the extent to which the dimensions of vulnerability have evolved over time in relation to financial resources, income and savings, physical assets, housing, education and skills, as well as social capital.
- Integrate gender equality, disability and social inclusion (GEDSI) issues throughout the NEVA. The updated NEVA must demonstrate that surveys and analysis consider GEDSI issues and understand the barriers and opportunities facing different groups using an intersectional approach.
- Distinguish between short-term measures focusing on upskilling and redeployment of individual workers, and longer-term activities focusing on economic diversification and attracting investment to generate new jobs.
- Develop and finalise South Africa's updated 2nd NEVA report.

Activity 2: Development of a dynamic NEVA platform

- Develop a metadata file for NEVA indicators to enable automated updates of datasets, integrating with other national, government, and opensource climate and socio-economic platforms, registers and databases, (and sources listed under Activity 1) to enable real time decision-making.
- Create an accessible online, automated NEVA platform and dashboard to track jobs on a systematic basis and to monitor and reflect the impacts of climate change and the transition on vulnerable groups (including communities, groups affected by marginalisation, workers, and businesses). This platform will be used to inform the priorities for SJRP implementation, domestic policy and decision-making processes on the just transition, the implementation of the Just Transition Framework, and other use cases such as an SMME just transition grant facility and priorities for just transition finance. The platform will be hosted and maintained by DFFE and integration and handover considerations should include capacity building and knowledge transfer.

Key outputs:

The activities are expected to yield the following key outputs:

Output 1: Updated NEVA Report

- South Africa's 2nd NEVA report for the period 2025 to 2029, informed by updated data, trends and value chain analysis, GEDSI considerations, as well as updated climate change indicators and relevant regulatory frameworks.

Output 2: Dynamic NEVA platform and dashboard

- A dynamic and accessible NEVA platform and dashboard to enable decision-making. As described above, the output should be informed by robust metadata inputs, should track job gains and losses due to the transition in line with the SJRP sectors and business cases, and should monitor and reflect the impacts of climate change and the transition on vulnerable groups.
- The dynamic NEVA tool should provide for a dashboard and infographics of indicators and trends in each value chain and provide summary assessments and trends to inform policy and decision-making processes.

Envisaged outcomes and impact:

DFFE and other key government stakeholders will use the updated NEVA report and the dynamic NEVA tracking tool to assess the impacts of climate change and the transition on vulnerable groups (including communities, groups affected by marginalisation, workers, and businesses) and vulnerable regions (such as Mpumalanga and the Eastern Cape).

The outputs will inform the priorities for SJRP implementation, domestic policy, and decision-making around the just transition in South Africa. The project will enable government to better tailor alternative employment solutions for affected workers in the five SJRP sectors, informing short-term measures focusing on up-skilling and redeployment of individual workers, and longer-term activities focusing on economic diversification and attracting investment to generate new jobs.

The outputs will support the implementation of the Just Transition Framework, inform priorities for just transition finance, and support the development of other use cases such as a just transition SMME grant facility.

Proposed duration:

15 – 18 months (assumed start in February 2025)

Useful resources:

[NEVA and Sector Jobs Resilience Plans](#)



Important things to consider in your application:



Gender equality, disability and social inclusion (GEDSI)

All proposals must consider accessibility and inclusivity as a key action area in creating a more democratic, equitable and just transition to reduced emissions. As a result, all projects are required to mainstream GEDSI and ensure adequate expertise and resources are available throughout delivery to achieve this. Illustrative examples of potential activities include:

- Conducting a GEDSI analysis and systematically taking into account the differentiated needs, knowledge, experiences, and priorities of women, youth, and historically disadvantaged and other marginalised groups in all project activities.
- Contributing to improved evidence and policymaking to tackle energy poverty and increase energy security in South Africa.
- Conducting enhanced needs assessments and meaningfully engaging with civil society groups, including women's rights organisations and organisations of people with disabilities, to better understand energy and employment needs and opportunities.
- Ensuring that the development of a green economy is built on inclusive supply chains, removing barriers faced by small businesses, marginalised groups, and those working in sectors which may shrink over time (e.g., fossil fuels).
- Facilitating increased engagement of women, youth, poor households, people with disabilities, and historically disadvantaged and other marginalised groups in decision-making, public consultation, and participatory planning.
- Increasing the integration of GEDSI-considerations in policies, regulation, and planning processes and/or improved implementation of these.

We will score all projects using GEDSI selection criteria to ensure that projects seek to understand and address the needs and vulnerabilities of women and marginalised groups. All proposals are required to:

- Consider the key differences in the ways that local communities, youth, women, lower-income households, marginalised groups, and people with disabilities access and use energy and contribute to the just transition. Key issues may include those of affordability, accessibility, safety, and representation.
- Identify specific outputs that would address some of the issues faced and integrate these activities through the project.
- Ensure that the project's monitoring and results framework explicitly states how GEDSI outcomes will be achieved through the project's outputs.
- To reflect FCDO's commitment to the localisation of delivery, additional consideration will be given to consortia which include local organisations, Level 1 & 2 B-BBEE contributors, women-owned entities, youth-owned entities and entities owned by people with disabilities.

Applicants are encouraged to review UK PACT's GEDSI Guidance when developing their proposals.



Budget and funding availability

Each proposal will be assessed independently. We will support projects with grants valued up to £500,000 per financial year (UK financial year, April – March). This value increases for projects longer than 12 months (i.e., the grant value for two years would be up to £1,000,000). All projects are assumed to have a start date in February 2025. The projects must have a clear indication of the outputs and outcomes expected to be achieved in the first year, as well as in each subsequent year of implementation.

Proposals can be submitted for more than one project however, separate applications should be prepared for each project.



Useful references

As a demand-led programme, the South Africa-UK PACT Country Fund aims to align its support with the Government of South Africa's existing plans and policies surrounding a just transition. Applicants are advised to refer to these references, which include:

- [NEVA and Sector Jobs Resilience Plans](#)
- [Just Energy Transition Partnership](#)
- [Climate Change Act 22 of 2024](#)
- [Electricity Regulation Amendment Act 38 of 2024](#)



What is the timeline for selection?

Stage	Date
1. Terms of Reference (ToR) and application process launched	11 Sep 2024
2. Deadline for submitting clarification questions	4 Oct 2024
3. Publication of answers to clarification questions will take place every 2 weeks, starting 2 weeks after the CfP is launched. Consolidated clarifications will be published on the CfP web page. Kindly note that clarification questions will not be answered by email.	27 Sep 2024 4 Oct 2024 11 Oct 2024
4. Deadline for submission of application	23 Oct 2024
5. Applicants notified	Week of 18 Nov
6. Due diligence, co-creation and grant signing	Nov 2024 - Feb 2025
7. Projects start	Feb 2025





Application guidance

Projects will be selected through a **one-stage** open and competitive Call for Proposals. Applicants should read the **Terms of Reference** and **Applicant Handbook** to understand what is required to submit a strong proposal for this call.

The following documents form your application pack, they must be downloaded and completed in English. You may then fill in the form linked on the CfP web page. **After** submitting this form, you will receive an email containing a link to upload your application pack.

- **Project proposal template** - please ensure that you populate the proposal template as fully as possible, to avoid submitting an incomplete application.
- **Budget and workplan template** - all proposals must include an inception phase of one month in the workplan, during which time any necessary engagements with the Government of South Africa will be carried out, deliverables confirmed and theory of change finalised. At the end of this period a revised workplan may be required.
- **Project Theory of Change form**
- **Project risk and issue register template**

Additional supporting documentation may be submitted, such as CVs of key staff.

What are the eligibility criteria?

	Eligibility criteria
Applicant	<ul style="list-style-type: none">• We invite all organisations with relevant experience in delivering technical assistance and capacity-building projects. This could be think-tanks, consultancies, academic institutions, community organisations, NGOs, professional associations, or any similar organisations that have the knowledge, skills and experience to deliver an eligible project.• Proposals from private sector entities are welcomed, noting however that profit cannot be funded through grant funding and projects must be submitted on a not-for-profit basis. Companies are encouraged to refer to the Applicant Handbook for clarity on eligible costs.• Government agencies and Government departments are not eligible to receive UK PACT funding, either as a lead organisation or partner in a consortium. This includes state-owned enterprises.• We encourage consortia to apply.

	Eligibility criteria
Project	<ul style="list-style-type: none">• Proposals must align with the strategic priorities outlined in these terms of reference.• Budgets should not include capital expenses or tangible assets.• The value of projects must not exceed £500,000 for one year period.
Application	<ul style="list-style-type: none">• Applications must be coherent and legible.• All documents must be properly filled out.• Applications and all forms of communication with the programme must be submitted in English.

What are the selection criteria?

Area	Heading	Criteria description	Weighting
Technical (70%)	Impact	The applicant clearly articulates how the project will specifically help the counterpart achieve and accelerate their goals of achieving carbon emissions reductions in relevant sectors. The applicant provides a clear impact pathway showing how their outputs will lead to the outcomes required for transformational change and identifies opportunities for replication / scaling up of activities.	15
	Project description, methodology and workplan	The applicant clearly articulates how the project responds to the terms of reference, plans to deliver the expected outputs and lays out a project plan which includes a description of the project, activities, workplan, and stakeholder engagement plan. The applicant provides a convincing rationale for the ability of the project to deliver outcomes.	25
	Gender equality, disability and social inclusion - GEDSI	The applicant clearly identifies how the project will seek to understand and address the needs and vulnerabilities of women and marginalised groups. The proposal has considered the key differences in the way that local communities, men, women, lower-income households, marginalised groups and people with disabilities are impacted by a just transition. The proposal has successfully mainstreamed GEDSI in their project and identified specific outputs that would lead to desired GEDSI outcomes.	15
	Knowledge, skills, experience, and team structure	<p>The proposed project team has relevant knowledge and experience in the subject area and has the skills in place to deliver the project. This includes knowledge, skills and experience in the specific thematic area the proposal responds to, technical assistance/capacity building, and public sector project implementation. The core skills, experience and knowledge required to deliver all elements of the project that have been outlined (including project management, monitoring and evaluation, and GEDSI mainstreaming) are covered and the team is well structured and available to mobilise quickly.</p> <p>To ensure effective knowledge transfer and capacity building, applicants must demonstrate a strong understanding of South African priorities and delivery context, as well as bringing relevant expertise required.</p> <p>Additional consideration will be given to consortia which include local organisations, Level 1 & 2 B-BBEE contributors, women-owned entities, youth-owned entities, and entities owned by people with disabilities.</p>	15

What are the selection criteria?

Area	Heading	Criteria description	Weighting
Project Management (15%)	Project management	The proposal outlines a clear plan for mobilising the project quickly and effectively. There are robust project management mechanisms to ensure activities stay on track and deliver project results. The applicant provides a clear plan for managing consortia where applicable.	10
		The applicant has clearly outlined the key risks associated with delivery with clear plans for mitigating these and an understanding of the likelihood and impact of each. This includes impacts on marginalised/indigenous groups and changing political and security contexts.	5
	Environmental sustainability	The applicant has outlined a robust approach to minimising any negative impact on the environment due to this project. For example, through minimising travel, tracking emissions, implementing environmental policies, carbon off-setting etc.	Y/N
Financial (15%)	Budget	The budget is clearly linked to the activities and outputs outlined, with appropriate allocation of time and resources, and costs that appear reasonable for the activities proposed, including sufficient allocation for project management, reporting and data collection to allow for close coordination with UK PACT.	10
	Value for money	The application provides confidence that the project will represent good value for money, including FCDO's Four Es (economy, efficiency, effectiveness, and equity). The Four Es are detailed in the Applicant Handbook.	5

How do we score each criterion?

Score	
5 (Excellent)	Demonstrates an expert understanding of the project and proposes excellent and accurate solutions which address all requirements, and which are innovative where appropriate. Responses are excellently tailored to the context in all aspects. The level of detail and quality of information provides the highest degree of confidence in the ability to deliver.
4 (Very Good)	Demonstrates a very good understanding of the topic relating to delivery of the project. Responses are relevantly tailored to the context in the majority of aspects and build very well on the solutions. There is sufficient detail and quality of information to give a strong level of confidence that they will deliver.
3 (Good)	Demonstrates a good understanding of the topic relating to the delivery of the project. Responses are reasonably tailored to the context for many of the aspects. There is a good level of detail and quality to give a good level of confidence that they will deliver.
2 (Satisfactory)	Demonstrates a satisfactory understanding of the topic relating to delivery of the project. Some appetite to tailor to context where required. Provides a limited level of detail and the quality of information provided gives only some level of confidence that they will be able to deliver satisfactorily.
1 (Unsatisfactory)	Demonstrates a poor understanding of the topic relating to delivery of the project. Poor tailoring to the context where this is required. Generally, an unsatisfactory and a low level of quality information and detail, leading to a low level of confidence that they will deliver.
0 (Fail)	Failure to address the material requirements of the project. No tailoring of responses to meet the context. No quality responses providing no confidence that they will deliver.



What to do if you have questions?

Applicants should read these terms of reference in conjunction with the Applicant Handbook for full details of how to apply. Further questions on the scope of this call for proposals can be addressed to: southafrica@ukpact.co.uk.

Clarification questions will be accepted until **17:00 SAST (15:00 UTC) on 4 October 2024** and answers will be published on the South Africa-UK PACT Call for Proposals web page.

Relevant documents

- CfP Terms of Reference
- Project proposal template
- Budget and workplan template
- Project Theory of Change form
- Project risk and issue register template
- Applicant handbook
- UK PACT's GEDSI Guidance
- Risk management guide for applicants

These will be available on the Call for Proposals web page when you apply.

UK PACT

UK Partnering for Accelerated Climate Transitions (UK PACT) is a programme funded by the UK Government. UK PACT supports countries that strive to overcome barriers to clean growth and have high emissions reduction potential to accelerate their climate change mitigation efforts.
