



Terms of Reference (ToR): Professional services to undertake the Formative Evaluation of the Just Energy Transition (JET) Implementation Plan

Contracting authority	African Climate Foundation
Implementing partner	JET Project Management Unit (JET PMU), The Presidency of South Africa
Contract period	June 2026 to December 2026
Estimated level of effort	To be determined by bidder
Location	South Africa (Hybrid/Remote with travel as required)
Submission portal	ACF Portal - RFP 13
PLEASE NOTE NO SUBMISSIONS VIA EMAIL WILL BE ACCEPTED	
Proposal submission deadline	8 June 2026 (17h00 SA standard time)
Queries	For any technical queries, please contact Jamie Robertsen (jamie.robertsen@jetpmu.org.za) via email with subject: RFP 13 - Professional services to undertake the Formative Evaluation of the Just Energy Transition (JET) Implementation Plan If you need any technical assistance with the portal, please reach out to grants@africanclimatefoundation.org
Deadline for queries	27 May 2026 (17h00 SA standard time)
Queries posted link	RFP13 Questions and Answers - Google Docs

1. Introduction

The African Climate Foundation (ACF), in partnership with the JET Project Management Unit (JET PMU) in The Presidency, invites qualified service providers to submit proposals for a formative evaluation of implementation to date of the Just Energy Transition Implementation Plan (2023-2027) (JET IP). This evaluation is a strategic priority to assess the progress, effectiveness, and inclusivity of South Africa's flagship JET IP as it approaches its final year of implementation. The findings will be instrumental in shaping an evidence-based improvement plan for the current phase and in providing critical lessons and recommendations for the design of the subsequent phase of the Just Energy Transition (JET IP Phase 2, 2028-2031). This Terms of Reference (ToR) outlines the scope, objectives, and requirements for this comprehensive evaluation, which is to be conducted in accordance with South Africa's Department of Planning, Monitoring and Evaluation (DPME) standards and the Principles for Gender-Responsive Evaluations.

2. Background Information and Rationale

2.1 Background to the Intervention Being Evaluated

The Just Energy Transition (JET) is a critical national priority for South Africa, aiming to transition to a low-carbon, climate-resilient economy while addressing the social and economic impacts on workers and communities. The policy rationale is rooted in the country's commitments under the Paris Agreement, its National Development Plan (NDP), and the outcomes of the COP26 JET Partnership. The JET IP was approved by Cabinet at the end of 2023, and implementation began in 2024. It is built on a R1.5 trillion investment scale of need as documented in the 2022 JET Investment Plan and is designed to address



the societal challenge of decarbonizing the economy while ensuring justice for affected workers and communities and promoting inclusive growth, energy security, and employment.

The national JET intervention is coordinated by the JET Project Management Unit (JET PMU) in The Presidency and is implemented across six key portfolios by a range of national departments, state-owned entities, provincial governments, and municipalities.

The JET IP includes a results framework with indicators and a Theory of Change (ToC), which articulates how short-term outcomes (e.g., agreed funding flows, effective coordination) are expected to lead to medium-term outcomes (e.g., finance mobilized, skills systems enhanced) and ultimately to the desired impacts of a low-carbon, climate-resilient society. The key programme document is available at: JET Implementation Plan (<https://justenergytransition.co.za/wp-content/uploads/2024/10/JET-Implementation-Plan-2023-2027-1.pdf>).

Now entering its third year of implementation, a formative, learning-oriented evaluation is required to assess progress, identify challenges and successes, and inform the next iteration of the investment plan (JET IP Phase 2, 2028-2031) and its future institutional and partnership arrangements. The evaluation will feed directly into key decision-making processes regarding the design of Phase 2 and the future institutional delivery model.

2.2 Purpose of the Evaluation

The primary purpose of this evaluation is **formative and focused learning**. As per the DPME guidelines for an implementation evaluation, the core question is: **"Is the JET IP being implemented as specified, are early outcomes being achieved, and why?"** The evaluation aims to understand how the intervention is working and how it can be strengthened during its rollout. It is not a summative judgment of success or failure but a constructive assessment to improve performance and guide future delivery design.

The evaluation will provide strategic information to the JET PMU, partner institutions, and international partners on the effectiveness of implementation. The findings will be used to develop a concrete improvement plan for the remainder of the current JET IP and to provide an evidence-based foundation for designing its successor, including its institutional home and partnership model.

Specifically, the purpose of the evaluation is to assess and analyse:

- JET investments to date per Portfolio
- JET institutional capacity development to date
- The JET Partnership
- The JET PMU's role
- Recommendations for JET IP Phase 2 (2028-2033).

3. The Focus of the Evaluation

3.1 Evaluation Questions

Drawing on the DPME's six lenses (Relevance, Coherence, Effectiveness, Efficiency, Impact, Sustainability) and the requirement to mainstream gender and inclusion, the evaluation will address the following high-level questions. These questions are designed to be answerable with available data and resources and will be further refined in the inception phase.

1. **Effectiveness and Progress:** To what extent are the short- and medium-term outcomes of the JET IP (as per its Theory of Change) being achieved across the six portfolios? What are the critical blockages and enablers, and were the initial targets realistic?



2. **Institutional Capability and Coherence:** How effective and efficient has the current institutional architecture (JET PMU, lead institutions, governance structures) been in driving and coordinating delivery? How coherent are efforts across government and with non-state partners? How effectively and efficiently has institutional capacity been built to deliver JET investments in the six Portfolios? What specific value has the JET PMU added (or failed to add) in terms of coordination, monitoring, problem-solving, strategic leadership, and comparative advantage as a central delivery unit within the Presidency? How does its actual role compare to its intended role in the JET IP governance framework? Have these institutions been appropriately resourced and empowered for their JET roles, and how best can institutional capacity be sustained in Phase 2?
3. **Relevance and Inclusivity:** How relevant is the JET IP's design to the needs of its intended beneficiaries, particularly workers in coal value chains, vulnerable communities in Mpumalanga, and SMMEs? How inclusive and participatory is the implementation process, and what are the differential impacts and outcomes for women, youth, and persons with disabilities?
4. **Partnerships for Financing (Coherence and Sustainability):** How effective and coherent has the International Partners Group (IPG) and broader financing partnership model been in mobilising and deploying JET pledged funds? What are the key lessons for the future of the JET partnership and for mobilising and deploying climate financing for Phase 2?

3.2 Intended Users and Stakeholders

Potential Users of the Evaluation	How they will use it
The Presidency	To refine JET implementation strategies, strengthen coordination, and develop an evidence-based Improvement Plan and proposal for Phase 2.
National Departments	To understand portfolio-specific challenges, improve programme design, and enhance inter-departmental coordination.
Provincial and Local Government	To inform provincial and local JET planning, resource allocation, and community engagement strategies.
State Owned Entities	To identify operational improvements and align project pipelines more effectively with JET IP goals.
International Partners	To understand the effectiveness of the JET partnership model, inform future funding strategies, and improve coordinated support to country platforms.
Civil Society, Labour and Communities	To identify opportunities for beneficial participation, hold government and partners accountable, and to advocate for an inclusive and just transition based on evidence.

3.3 Scope of the Evaluation

- **Time Period:** The evaluation will focus on the implementation of the JET IP from its start in 2024 up to mid-2026.
- **Intervention Components:** The evaluation will cover all six JET portfolios: Electricity, Mpumalanga Just Transition, Municipal Support, Skills Development, Green Hydrogen (GH2), and New Energy Vehicles (NEVs).
- **Geographic and Institutional Coverage:** The evaluation will have a national focus but will conduct deeper dives into priority regions, particularly the Mpumalanga province. It will engage with relevant national departments, key state-owned entities, international partners, private sector partners, a sample of municipalities, and civil society organisations.
- **Thematic Focus:** The primary focus is on **implementation, institutional effectiveness, and inclusivity**, as defined by the evaluation questions above.
- **Excluded:** An assessment of macroeconomic impacts of the JET IP to date is outside the scope, though early outcome signs will be examined.



4. Evaluation Design

This section outlines the expected methodological approach. Bidders are expected to propose a robust, mixed-methods design in their proposals.

- Overall Methodological Framework: A theory-based approach is required, which will test the validity of the JET IP's Theory of Change and its underlying assumptions. The evaluation should be participatory, engaging key stakeholders in a constructive, learning-oriented manner, as emphasised in the DPME guideline and the meeting notes.
- Literature and Document Review: A comprehensive review of all relevant JET IP documents, quarterly progress reports, portfolio plans, partner reports, and relevant research/evaluations in the sector.
- Analysis of gender-disaggregated data (where available) from the JET Investment Register, portfolio M&E systems, StatsSA, and other relevant sources.
- Primary Qualitative Data: In-depth key informant interviews and focus group discussions with a diverse range of stakeholders. This will include the JET PMU; the lead institutions of the six JET portfolios; national and provincial departments; the Presidential Climate Commission (PCC); the Industrial Development Corporation (IDC); the Development Bank of Southern Africa (DBSA); South African Local Government Association (SALGA); Development Finance Institutions (DFIs); Multi-Lateral Development Banks (MDBs); IPG members and other international partner governments; private sector associations; labour unions; municipalities; civil society organisations; and community-based organisations (including women and youth groups). The sample must be designed to capture diverse perspectives, including those of vulnerable groups.
- Case Studies: Development of in-depth case studies of specific initiatives (at least one from each of the six JET portfolios) to provide a granular understanding of implementation dynamics. These could include, for example, a community development project in Mpumalanga, a JET skills initiative, a JET Funding Platform beneficiary, a municipal JET initiative, a GH2 project, or a NEV project.
- Gender Analysis: The methodology must explicitly include a gender analysis framework to assess how the JET IP affects women, men, youth, and persons with disabilities differently, and to examine the structures that contribute to inequalities. This will involve analysing gender-disaggregated data, using qualitative methods to capture diverse voices, and assessing the extent to which the JET addresses practical and strategic gender needs.
- Participatory and Learning-Oriented Approach: The design must include mechanisms for feedback and sensemaking with stakeholders, such as validation workshops to discuss preliminary findings. This is critical for building ownership and ensuring the evaluation's recommendations are actionable.
- Rigor and Quality: The methodology must ensure triangulation of data from multiple sources to ensure credibility and validity. The evaluation will adhere to the DPME's quality standards for evaluation reports, including the 1/5/25 reporting format (a 1-page policy summary, a 5-page executive summary, and a 25-page main report) over and above the full evaluation report (max 100 pages, single line spacing 11pt font).
- Ethical Considerations: The evaluation must be conducted ethically, with a clear plan to protect the confidentiality, dignity, and rights of all informants. Specific safeguards must be in place for engaging with vulnerable groups. The proposal should outline how informed consent will be obtained and how data will be anonymised.

5. Evaluation Project Plan

5.1 Products/Deliverables Expected

The core products expected from this assignment are:

Deliverable	Description
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1	Inception Report	A detailed report refining the methodology, presenting a detailed evaluation matrix (linking questions to data sources, indicators, and analysis methods), final work plan, and a proposed list of stakeholders for engagement. Must include a section on how gender and inclusion will be integrated. (MSWord and PDF format)
2	Literature Review Report	A synthesis of existing evidence and documentation relevant to the JET IP. (MSWord & PDF format)
3	Data Collection Instruments & Analysis Plan	Final versions of all interview protocols, focus group discussion guides, case study frameworks, and a detailed plan for data analysis (including gender analysis). (MSWord & PDF format)
4	Draft Evaluation Report	A comprehensive draft report presenting findings, conclusions, lessons learned, and actionable recommendations across the thematic areas (max 100 pages, single line spacing 11pt font), as well as the DPME's 1/5/25 reporting structure. (MSWord & PDF format)
5	Validation Workshop(s)	Facilitation of targeted workshops (e.g., with the JET PMU, six portfolio leads, and a dedicated session with international partners) to present preliminary findings and gather constructive feedback.
6	Final Evaluation Report	A final report incorporating feedback from the Steering Committee and an independent peer review process (max 100 pages, single line spacing 11pt font), as well as the DPME's 1/5/25 reporting structure. The report must be clear, constructive, and actionable. (MSWord & PDF format)
7	Improvement Plan Workshop and Report	Facilitation of a workshop with the JET PMU and key stakeholders to translate findings into a concrete, time-bound improvement plan for the remainder of the current JET IP and to inform the design of JET IP Phase 2. A summary report from the workshop will need to be provided. (MSWord & PDF format)
8	All Datasets and Metadata	Provision of all anonymised qualitative and quantitative data collected, along with full metadata and codebooks, to the JET PMU. (MSWord, MExcel, and other readable formats)
9	PowerPoint Presentation	A presentation summarising the evaluation process, key findings, and recommendations for various audiences. (PPT & PDF format)

5.2 Activities and Time Frame

The assignment is expected to last **8 months**. A realistic work plan aligned to their proposed methodology, team structure and level of effort. The final work plan and deliverable schedule will be agreed on during the inception phase.

The indicative sequencing below is provided to guide bidders. Bidders may propose adjustments where these are justified by their methodology and work plan.

Activity / Deliverable	Expected Timeline
Mobilisation and contracting	Mid-June 2026
Submission of Inception Report	Late-June 2026
Approval of Inception Report by Steering Committee	July 2026
Literature review, data collection tool development submission	July 2026
Literature review, data collection tool development approval	August 2026
Data collection (fieldwork, interviews, focus groups)	August – September 2026
Submission of draft evaluation report	October 2026
Validation workshop	October 2026



Submission of draft final evaluation report for Steering Committee review	November 2026
Receive draft final evaluation report Steering Committee review	November 2026
Submission of draft final evaluation report for peer review	November 2026
Receive draft final evaluation report peer review	December 2026
Final report final submission	December 2026
Final report approval by Steering Committee	December 2026
Improvement Plan workshop	December 2026
Improvement Plan & workshop summary report submission	January 2027
Improvement Plan & workshop summary report approval by Steering Committee	January 2027
Contract End	January 2027

The timeline is indicative and will depend on timely access to documents, availability of stakeholders, scheduling of validation workshops, and receipt of consolidated feedback from the Steering Committee and peer reviewers.

6. Budget and Payment Schedule

This evaluation is funded by the German Government. The final cost will depend on the proposed methodology, team size, and depth of work (e.g., number of case studies, sites visited). Bidders must provide a detailed, activity-based budget that is realistic and demonstrates value for money.

The payment schedule will be linked to the approval of key deliverables as follows:

- **10%** upon approval of the Inception Report
- **40%** upon approval of final data collection tools and analysis plan
- **20%** upon approval of the Draft Evaluation Report
- **20%** upon approval of the Final Evaluation Report
- **10%** upon approval of Improvement Plan and workshop summary report and delivery of all final datasets and presentation.

7. Management Arrangements

7.1 Role of Steering Committee

A Steering Committee will be established to oversee the evaluation, ensuring its quality, credibility, and relevance. It will be chaired by the JET PMU and have representatives from National Treasury, DFFE, DEE, the PCC, the IPG, and the lead institutions of the six JET Portfolios. The Steering Committee will approve the ToR, Inception Report, and final report. It will provide strategic guidance and consolidate feedback on all deliverables.

7.2 Reporting Arrangements

The successful bidder will report contractually to the African Climate Foundation but will work under the direction of the Steering Committee. The day-to-day project management and primary point of contact will be Ms. Christel Jacob (MEL Manager, JET PMU and her delegated professional support). Regular progress meetings will be scheduled throughout the project.



8. The Proposal to be Submitted

8.1 Structure of Proposal

Qualifying providers are invited to submit an electronic proposal outlining the provider's approach to fulfilling the requirements (**max 15 pages**, excluding annexures). Proposals require the following this structure:

1. Understanding of the TORs and Context: A brief statement demonstrating a clear understanding of the JET IP, the purpose of the evaluation, and the South African context.
2. Approach, Design, and Methodology: A detailed description of the proposed methodology, including the overall framework, data collection and analysis methods, a draft evaluation matrix, sampling strategy, case study selection criteria, and a clear explanation of how the approach will be participatory, learning-focused, and gender-responsive.
3. Activity-based Evaluation Project Plan: A Gantt chart or similar outlining key activities, timelines, and level of effort for each team member.
4. Team Composition and Expertise: Details of the proposed team, their roles, and level of effort. CVs must be included in an annex. The team must clearly identify the Project Manager, Evaluation Specialist, and Sector Specialist(s), as per DPME guidelines. At least 30% of the team must be Previously Disadvantaged Individuals (PDIs) playing professional roles.
5. Capacity Development: A description of how the team will build the capacity of JET lead institution staff and/or emerging evaluators (especially young women and PDIs) during the evaluation.
6. Quality Assurance Plan: A description of the internal mechanisms the team will use to ensure the quality and rigor of all processes and outputs.
7. Activity-based Budget: A detailed budget in South African Rand, inclusive of VAT, broken down by activity and daily rates. Provide a detailed cost proposal that is realistic and reflects the scope of the work. Costing should be broken down to a cost per hour. Please make use of the **Pricing template** for the cost proposal as provided on the portal.
8. Related Work Examples: Examples of at least two relevant previous assignments (e.g., evaluation reports of a similar scope and complexity). Contact details for references must be provided.

Service providers have the option to submit proposals as individual entities or as part of a consortium. When submitting as a consortium, providers must ensure that the full range of necessary skills and experience required for this assignment are represented within a single proposal. Additionally, consortium proposals must clearly outline the proposed project governance structure.

8.2 Documents Required for Submission

- a) Technical proposal (aligned to guidance in section 8.1)
- b) Signed Conflict of Interest Declaration (completed on portal).
- c) Valid Tax Clearance Certificate (uploaded on portal).
- d) Company registration document (uploaded on portal).
- e) Completed Pricing template (available to download and upload on portal).

8.3 Evaluation Team Competencies

The team must collectively demonstrate the following competencies, aligned with DPME's Evaluation Competencies framework:



- **Overarching Considerations:** Deep contextual knowledge of the South African government and economy, electricity sector reform, and socio-economic landscape; strong ethical practice; and excellent interpersonal and facilitation skills.
- **Evaluation Leadership:** Proven project management experience in leading complex evaluations; a strong team leader with a track record of delivering high-quality work on time; meaningful inclusion of PDIs in the team.
- **Evaluation Craft:** Expertise in designing and implementing mixed-method evaluations, including theory-based approaches; strong analytical and synthesis skills; ability to produce clear, concise, and actionable reports.
- **Sector Knowledge:** Demonstrated understanding of the Just Energy Transition, climate mitigation, climate finance, and relevant energy transition sectors.
- **Gender Expertise:** The team must include at least one member with specialist expertise in gender-responsive evaluation and gender analysis, as required by the Gender-Responsive Evaluations Guideline.

8.4 Evaluation Criteria for Proposals

Proposals will be evaluated on a three-stage basis.

Stage 1: Administrative Compliance

The following criteria will be applied to determine whether a proposal has met the mandatory administrative requirements of the RFP:

- The proposal was submitted on or before the specified closing date and time.
- The proposal is complete, with all sections fully completed, and includes all mandatory documents as outlined in the Terms of Reference (ToR) (refer to Section 8.2).

Only proposals that fully comply with the above administrative requirements will proceed to Stage 2 of the evaluation process.

Stage 2: Technical evaluation

At this stage, proposals will be evaluated against the functionality (technical) criteria using the weighting system set out below. Each criterion will be scored according to the allocated weighting, and the total technical score will determine whether a proposal meets the minimum technical threshold required to proceed to the next stage.

The functionality (technical) criteria and corresponding weightings are as follows:

	Domain/Descriptor	Functional Evaluation Criteria	Weight
1	Quality of the Proposal	The extent to which the proposal addresses the ToR, demonstrates a clear understanding of the context, and presents a coherent, feasible, and rigorous methodology (including gender-responsiveness and participation).	25%
1.1	Understanding of the TORs and Context	A brief statement demonstrating a clear understanding of the JET IP, the purpose of the evaluation, and the South African context.	6%
1.2	Approach, Design, and Methodology	A detailed description of the proposed methodology, including the overall framework, data collection and analysis methods, a draft evaluation matrix, sampling strategy, case study selection criteria, and	13%



		a clear explanation of how the approach will be participatory, learning-focused, and gender-responsive.	
1.3	Activity-based Evaluation Project Plan	Clear and realistic project plan.	6%
2	Team Expertise and Experience	The collective qualifications and experience of the proposed team against the required competencies (Evaluation Leadership, Evaluation Craft, Sector Knowledge, Gender Expertise). This includes the track record of the Project Manager, Evaluation Specialist, and Sector Specialist. CVs to be submitted.	57%
2.1	Project Manager	Experience managing projects of this size and complexity	13%
2.2	Evaluation Specialist	Experience undertaking evaluations of a similar nature.	13%
2.3	Sector Specialist(s)	Deep knowledge of the JET/sector landscape.	13%
2.4	Gender Expertise	A team member with proven gender analysis and evaluation expertise.	6%
2.5	PDI Role in Team	At least 30% of the team are PDIs with meaningful roles and person-days.	6%
2.6	Capacity Development	A clear strategy for building capacity of government/junior staff.	6%
3	Past Performance and Track Record	Quality of previous work as evidenced in proposal and by submitted examples and positive references, including track record of completing projects within the required timeframe. Examples of at least two relevant previous assignments and contact details for external references.	18%
3.1	Relevant examples	Evidence of utilising the DPME NEF in a similar context/content area – 2 evaluation examples	6%
3.2	Time management	Evidence of evaluations meeting original contract timelines – 2 examples of approved timelines and evidence of receipt of deliverable on time	6%
3.3	References	2 separate evaluation referees interviewed	6%
	Total		100%

Stage 03: Price Evaluation

Only proposals that achieve a minimum technical score of 70% in Stage 2 (Functionality Evaluation) will be considered for price evaluation.

At this stage, proposals will be assessed for cost competitiveness, transparency, and value for money, considering the proposed methodology, personnel, and level of effort. The evaluation will consider the total cost of the proposal in relation to the quality and feasibility of the proposed approach.

Price is evaluated using a comparative formula, where the lowest acceptable price receives the full 20 points, and other prices are scored proportionally.

Stage	Domain/Descriptor	Weight
Stage 02	Functionality (technical) evaluation	80%
Stage 03	Price and value for money evaluation	20%
Total		100%



ACF reserves the right not to award the contract to the lowest-priced proposal, but rather to the proposal that demonstrates the best overall value for money.

9. Confidentiality and Conditions

- Confidentiality: All information submitted in response to this TOR will be treated as confidential and used solely for the purposes of evaluating the proposal. Service providers may not disclose information relating to this TOR of ACF's or JET PMU's operations without prior written consent.
- Language: Proposals, documents and correspondence must be submitted in English.
- Validity of Proposals: All pricing and conditions contained in the proposal shall remain valid for a minimum of 90 calendar days from the closing date of submission. Any deviation from this must be clearly stated and may affect the evaluation outcome.
- No Obligation to Award: ACF reserves the right not to award a contract because of this TOR and is under no obligation to provide reasoning or feedback for its decision. ACF may cancel or modify this procurement process at any time.
- Due Diligence: ACF reserves the right to conduct due diligence on service providers, including requesting additional information, reference checks, or interviews.
- Conflicts of interest: Service providers must declare any actual or potential conflicts of interest. Failure to disclose such conflicts may result in the disqualification of the proposal or termination of any subsequent contract.
- Cost of submission: ACF shall not be responsible for any costs incurred by the service providers in preparing and submitting the proposal. All such costs will be borne solely by the service provider.
- Ethical Conduct: ACF expects all service providers to adhere to ethical business practices, including compliance with applicable anti-bribery and anti-corruption laws and regulations.
- Amendments and Clarifications: ACF may issue amendments or clarification to the TOR. These will be communicated to all bidders who submitted queries or expressed intent to submit proposals.

10. Enquiries

For any technical queries, please contact Jamie Robertsen (jamie.robertsen@jetpmu.org.za) via email with subject: **RFP 13 - Professional services to undertake the Formative Evaluation of the JET Implementation Plan**. If you need any technical assistance with the portal, please reach out to grants@africanclimatefoundation.org.