



European
Union



OXFAM
South Africa



Terms of Reference (TOR)

Landscape Mapping, Participatory Action Research, CBO and CBE Profiling, Organisational capacity Assessments and Baseline for 3 communities in Gauteng Province (Waterdal and Vosloorus) and Mpumalanga Province (Blinkpan, Komati Village)

August 2026

Project title:	Ubuntu Energy: Promoting an inclusive and Just Energy Transition (JET) in South Africa
Commissioning organization (s):	Oxfam South Africa (OZA)
Project Lifespan:	01 January 2026 – 01 December 2028
Geographic coverage (region, country):	South Africa: Gauteng Province - City of Johannesburg (Waterdal and Vosloorus); Mpumalanga Province - Steve Tshwete Municipality (Blinkpan, Komati Village)
Funding:	CEDAR European Union (EU) Grant and Climate Works Foundation
Contact Persons:	procurement@oxfam.org.za
Target Stakeholders to be interviewed	Civil Society Organisations (CSOs), Community-Based Organisations (CBOs), Serapeng Sa Ditlhare NPC, Nia Foundation, and Amadiya Project and Cooperative, green energy entrepreneurs, government stakeholders, private sector energy actors, Oxfam South Africa staff, green energy experts and community members in Gauteng Province - City of Johannesburg (Waterdal and Vosloorus); Mpumalanga Province - Steve Tshwete Municipality (Blinkpan, Komati Village).
Duration	3 and a half months
Start and Expected Completion date	15 September – 31 December 2026
Application deadline	05 September 2026

1. Brief of the Call

This is a call for proposals to conduct a comprehensive Landscape Mapping of the energy sector in South Africa and the socio-economic crisis linked to the Just Energy Transition in three affected **Communities in Gauteng (Midvaal and Ekurhuleni municipalities) and in Mpumalanga (Steve Tshwete Municipality)** through Participatory Action Research to understand the impact of energy poverty for these communities and assess the **potential of alternative energy solutions led by communities** to improve energy access, create jobs and skills in the sector. The process includes the Profiling of CBOs and community-led energy initiatives, conducting baselines and development plans for key CBOs, CBE and other local initiatives in the **3 Communities in Gauteng (Midvaal and Ekurhuleni municipalities) and in Mpumalanga (Steve Tshwete Municipality)**.

2. Background

2.1. Oxfam South Africa

Oxfam South Africa (OZA) is a registered Non-Governmental Organization (NGO) and the first African affiliate of the Oxfam Confederation. OZA works to mobilize people's power to address poverty, inequality, and the systems that sustain them, with programming across Climate Justice, Economic Justice, and Innovation and Sustainable Livelihoods, with Gender Justice and Just and Accountable Governance as cross-cutting priorities. OZA notes that South Africa is currently facing a deepening energy crisis, characterised by energy insecurity, rising costs of electricity, and the socio-economic impacts of a transitioning energy sector. These challenges disproportionately affect marginalised communities, particularly women and young people, who experience heightened barriers to economic participation and access to sustainable livelihoods.

2.2. Context of the Energy Crisis and the JET in South Africa

South Africa's energy sector is at a critical juncture, grappling with the dual challenges of heavy reliance on fossil fuels and the urgent need to transition to renewable energy sources. Coal accounts for over 80% of the country's electricity generation, making South Africa one of the world's most carbon-intensive economies (International Energy Agency [IEA], 2022). This dependency has resulted in significant environmental degradation, including air and water pollution, as well as contributing to South Africa's status as the 14th largest emitter of greenhouse gases globally (Climate Action Tracker, 2023). The environmental impacts are particularly severe in rural and peri-urban areas, where marginalised communities bear the brunt of pollution and energy poverty. Compounding these environmental challenges is South Africa's declining socio-economic landscape. The country faces record-high unemployment rates, with the overall unemployment rate reaching 32.9% in Q4 2023 and youth unemployment soaring to 66.5% (Statistics South Africa, 2023). Energy poverty remains a pervasive issue, with approximately 7.5 million households lacking access to reliable electricity (Department of Mineral Resources and Energy [DMRE], 2022).

Women, who are often responsible for household energy management, are disproportionately affected by energy insecurity, spending significant time on unpaid domestic labour such as collecting firewood or managing unreliable energy sources. This limits their ability to pursue education, employment, or entrepreneurial activities, further entrenching gender inequalities. The urgency of transitioning to renewable energy is widely recognised domestically and internationally. South Africa's JET Strategy, endorsed by the government in 2022, aims to balance energy security, economic growth, and social inclusion in the shift away from fossil fuels. However, the transition faces significant challenges, including insufficient investment in renewable energy infrastructure, limited technical capacity, and unequal access to economic opportunities in the green economy. Without targeted interventions, the transition risks exacerbating existing socio-economic disparities, particularly for women, youth, and historically disadvantaged communities.

The Ubuntu Energy project was designed to address these structural inequalities by placing marginalised communities at the centre of South Africa's energy transition. By empowering women and youth through skills development, enterprise incubation, and policy advocacy, the intervention aims to create a more inclusive and equitable energy transition. This action is a response to the South African energy crisis. A crisis created by energy production that is reliant on coal and cannot meet the needs of a growing population, resulting in unreliable electricity and inequities in energy access. While the coal industry is a major economic contributor, creating jobs and export revenue, these benefits are often offset by the long-term environmental and health costs for mine-affected communities and those hosting coal power plants. The South African energy industry needs urgent reform. The employment of those currently working in the coal industry may come to an end; however, a well-managed transition could lead to even greater economic opportunity and prosperity, and with retraining and reskilling, coal mine workers could be integrated within the green energy mix.

Oxfam believes that a just transition to sustainable, green energy solutions would promote social and economic inclusion and address sluggish economic growth. The shift towards a Just Energy Transition (JET) can empower women and youth, creating jobs and promoting green energy technologies for a more equitable and sustainable future in South Africa. Through this action, we aim to advance community-driven, sustainable, and gender-responsive climate-smart energy solutions by promoting social justice and a just energy transition in South African communities.

2.3. Scope of the Ubuntu Energy Project

The Ubuntu Energy Project was designed to promote an inclusive and Just Energy Transition in South Africa. It is an initiative co-funded by the European Union under the CEDAR framework and Climate Works Foundation. At its core the Ubuntu Energy is a community-driven initiative that seeks to contribute to a Just Energy Transition in South Africa. The project operates in Gauteng and Mpumalanga, specifically in Waterdal, Vosloorus, and Blinkpan, and is implemented in partnership with grassroots partners and community-based organisations.

The project places community knowledge, innovation, and participation at the centre of the transition to clean and sustainable energy. Through participatory action research, skills development, and enterprise support, the project aims to strengthen the capacity of women and youth to engage in the green economy, while supporting civil society to influence energy governance and policy processes in South Africa's Just Energy Transition.

As part of its commitment to learning, accountability, and evidence-based advocacy, OZA seeks to commission a Landscape Mapping of the energy sector and its socio-economic impact in 3 affected communities in Gauteng and Mpumalanga, specifically in Waterdal, Vosloorus, and Blinkpan through Participatory Action Research to generate insights into community experiences, challenges, and opportunities within the Just Energy Transition. The research will also include CBO and CBE Profiling, Organisational Capacity Assessments and Baselineing. The Landscape Mapping and PAR will contribute to the development of stakeholder mapping, CBE and CBO database, programme learning on alternative energy solutions in Waterdal, Vosloorus, and Blinkpan, inform advocacy, and support the amplification of community voices in policy processes and participation in the green economy.

3. Purpose: Landscape Mapping, Participatory Action Research, Profiling of CBOs and CBEs and Baselines in 3 Communities in Gauteng and Mpumalanga, specifically in Waterdal, Vosloorus, and Blinkpan.

The overall purpose of this assignment is to design and conduct a comprehensive Landscape Mapping, Participatory Action Research, CBE Profiling and Baselines that capture the policy, sector and community-level dynamics shaping energy access, livelihoods, and the Just Energy Transition in 3 communities in Gauteng and Mpumalanga, specifically in Waterdal, Vosloorus, and Blinkpan in Komati Village.

- The landscape mapping will examine the policy environment, identify key sector actors and other relevant local stakeholders, highlight institutional priorities, explore municipal, government and stakeholder responses within these communities to energy access challenges, market access and key gaps affecting meaningful participation of communities in the green economy.
- At the community level, the research will employ PAR with local CBEs and community members to map existing primary, secondary and tertiary stakeholders and document the lived experiences, perspectives, challenges and innovations related to energy access, livelihoods, climate resilience and adaptation and barriers to meaningful local economic participation in the energy sector for women and youths.
- Assess community energy assets; existing capacities for renewable energy project, identify and document local responses to energy poverty/insecurity; use an intersectional feminist framework to understand and document the experiences women with energy poverty.

- The study will conduct organisational capacity assessments and baselines for the identified CBOs and CBEs to ensure that they get the necessary support needed to become independent, resilient and effective in their operational and strategic processes.
- The study will Profile CBOs and CBEs to generate evidence-based insights to inform programme implementation, strengthen advocacy efforts, identify practical opportunities for collaboration and innovation and ensure that grassroots voices, particularly those of women and youth, are meaningfully integrated into energy policy and decision-making processes.

2.1. Goals and Objectives of the Assignment

The Consultants or Consortium will be responsible for designing and implementing the Landscape mapping, Participatory Action Research, CBO and CBE Profiling, OCA and Baselineing processes by producing a high-quality analytical research products in the form of a landscape mapping report, stakeholder maps and database, community briefs, CBO and CBE Profiles, OCAs and Baselines.

Specifically, the Consultants or Consortium will:

- Conduct a landscape mapping exercise of the energy sector in SA and the affected communities and produce a report.
- Develop a robust participatory action research methodology aligned with feminist, inclusive, and “Do No Harm” principles based on Oxfam values to understand the lived experiences, perspectives, challenges, and innovations related to energy access, livelihoods, climate resilience and adaptation, and barriers to meaningful local economic participation for women and youths in the energy sector.
- Develop a comprehensive stakeholder map identifying primary, secondary and tertiary actors in the 3 target communities of Waterdal, Vosloorus, and Blinkpan.
- Conduct comprehensive Organisational Capacity Assessments for CBOs, CBEs and other relevant community groups to understand their organisational development needs and establish development plans for the participating entities.
- Conduct participatory research, using qualitative and quantitative methods, to generate evidence on the drivers, impacts and opportunities associated with energy poverty and the Just Energy Transition. Produce a comprehensive report presenting the methodology, findings and actionable recommendations for Oxfam and its partners, identifying innovative and community-driven pathways to strengthen sustainable livelihoods, advance gender-transformative and locally led approaches, expand skills development, employment and entrepreneurship opportunities for women and youth, and inform policy and advocacy for an inclusive and equitable Just Energy Transition.

2.2. Key Deliverables/Outputs:

A. Landscape mapping Report of the energy sector in SA and the affected communities and produce a report.

- A comprehensive analytical report presenting findings from the policy and sector
- Analysis of national and local policy frameworks, institutional priorities, sector actors, existing programmes and implementation gaps shaping participation in the green economy
- Opportunities and barriers within the energy and green economy ecosystem

A. Stakeholder Map

- A comprehensive Mapping and database of key primary, secondary and tertiary stakeholders, partnerships, networks and Movements/Coalitions within the energy and green economy ecosystem

B. Participatory Action Research Report

- PAR Methodology with a clear approach for involving key community actors.
- Local-level landscape mapping related to energy access, livelihoods, and the Just Energy Transition
- Analysis of gendered, youth-centred and socio-economic dimensions of energy access and livelihoods
- Identify training and employment opportunities for women and youth, and establish the barriers to CSO, CBE, and community participation within the energy and green economy ecosystem
- Identification of community-led innovations, adaptation and resilience strategies and good practices linked to sustainable livelihoods
- Provide Evidence-based recommendations to strengthen inclusive policy implementation, programme design, advocacy and community participation in the Just Energy Transition.

C. CBO and CBE Profiling, Organisational Capacity Assessments and Baselines

- Identify and develop a database of local CBOs, CBEs and other grassroots actors active in the energy and JET sector in Waterdal, Vosloorus, and Blinkpan communities.
- Profile and baseline each active CBO and CBE, participating in the Ubuntu Energy Project.
- Conduct organizational capacity assessment for all the key CBOs, CBEs and other relevant grassroots actors participating in the Ubuntu Energy Project.
- Identify capacity development needs and development opportunities for CBEs.

- Work with OZA and its partners to establish development plans for the CBOs, CBEs and other relevant grassroots actors identified in Waterdal, Vosloorus, and Blinkpan communities.

Case Studies

- Documented examples of community-led energy solutions, enterprises, and innovations and livelihood initiatives
- Examples of grassroots adaptation, local resilience building and sustainable development practices within the Just Energy Transition contexts
- Stories and lessons demonstrating how women, youth, and community actors are navigating challenges and creating opportunities within the green economy

Learning and Insights Paper

- Practical insights to support ongoing programme learning, adaptive implementation and locally grounded advocacy efforts
- Participatory learning outputs capturing community perspectives, priorities, and lived experiences
- Facilitation summaries and reflection outputs from participatory engagements, dialogues, and action research process

Presentation of Findings

- Presentation of key findings to Oxfam South Africa, partners, and relevant stakeholders

4. Scope of Work

The Consultant will undertake the following tasks:

4.1. Methodology Development

It is suggested that the successful consultant(s) set out a proposed methodology that makes use of appropriate data collection approaches that will guide the collection and analysis of all relevant data sets for the project. OZA strongly encourages consultant(s) to test proven, participatory and/or innovative methodologies that allow a critical reflection of its collaborative work with stakeholders at local and national levels. We recommend that the choice of methods should potentially turn this assessment and training exercise into an empowering experience for project stakeholders, particularly the CBOs and their members (encouraging participatory methods). This

approach should enable the participation of all genders, youth, and marginalized groups involved in the project, considering gender equity, cultural differences as well as different literacy levels. All collected data should be disaggregated by gender and should be sensitive to gender justice. OZA will ensure that the exercise considers the participation of all main stakeholders (CBOs, CBEs, their members, surrounding communities, project teams, others to be identified during the stakeholder mapping exercise).

- Co-design with Oxfam South Africa and Ubuntu Energy project partners a participatory research framework integrating feminist and inclusive approaches
- Co-develop a landscape mapping methodology covering policy, sector and community level analysis related to the Just Energy Transition
- Co-facilitate capacity development sessions for community members and local stakeholders on participatory action research approaches, ethical engagement, storytelling and community-based data collection methods
- Strengthen the capacity of community facilitators and community members to document lived experiences, community innovations, and local solutions related to energy access and livelihoods
- Develop data collection tools (interview guides, focus group protocols, surveys, participatory mapping tools and community reflection exercise)
- Ensure integration of “Do No Harm”, safeguarding, informed consent and ethical research principles throughout the research process
- Submit methodology for approval by Oxfam South Africa

During fieldwork, the focus will be on the collection of qualitative and quantitative data from strategic partners, CBOs, CBEs, communities, Ubuntu Energy project teams and all relevant stakeholders. The envisaged data collection methods and tools, as well as the selection of stakeholders that will be part of the assessment and training, are to be highlighted and described by the consultant(s) in the proposal.

The proposals from the consultant(s) should contain the following methodological topics as a minimum:

- Description of the phases related to the landscape mapping and participatory action research and the proposed approach.
- Selection strategies, including area and population group represented in the sample, sampling procedures and sample size.
- Instruments to be used for data collection.
- Different types of data analysis will be carried out.

OZA acknowledges that the Ubuntu Energy project occurs in a dynamic and complex system, characterized by many interacting and interdependent elements. As such, the contribution of various actors to the assessment should be made with agility using the Triple Loop Learning approaches that allow for constant adaptation of the project intervention, incorporating user-friendly forms of feedback to improve the design and implementation of the tools and training exercises.

4.2. Stakeholder Engagement

Conduct participatory research with:

- Women and youth beneficiaries
- Civil society and community-based organisations
- Implementing partners
- Green energy entrepreneurs and SMMEs
- Government stakeholders
- Private sector energy actors
- Oxfam staff and partners

4.3. Drafting of Outputs

- Develop a draft Landscape Mapping and Participatory Action Research report and supporting outputs
- Present preliminary findings to Oxfam South Africa
- Incorporate feedback into revised drafts of the Landscape Mapping and Participatory Action Research Report
- CBO and CBE Profiling reports
- CBO and CBE baselines

4.4. Finalisation and Dissemination

- Submit final Landscape Mapping and Participatory Action Research Report and outputs to Oxfam South Africa.
- Develop presentation materials on the findings of Landscape Mapping, Participatory Action Research, CBO and CBE profiling and baselining
- Facilitate a validation and dissemination workshop for Landscape Mapping, Participatory Action Research, CBO and CBE profiling and baselining

5. Evaluation Team: Qualifications And Skills Needed

The external consultant(s) should have proven research, profiling, assessment and evaluation skills and experience, distinct methodological knowledge, and competencies (qualitative as well as quantitative), strong analytical and facilitation skills, cultural sensitivity, technical expertise, and experience in developing and training community-based enterprise on code of business conduct. The external consultant(s) should be able to facilitate the onboarding of data collection teams from the respective communities, which understand the local context and local language if needed. To ensure access to stakeholders of all gender identities, it would be ideal to have a diverse team during the days of the data collection (for the rest of the assessment and training period). It should be noted that the people whose CVs will be included in the proposal must necessarily be those who will perform the requested assessment and training.

6. Project Team And Support

Internally, the effectiveness review will be led, managed, and coordinated by the Senior Program Quality and Effectiveness Manager. An Advisory/Oversight Group comprising of the Project technical Leads (Movement Building Lead, Innovation and Sustainable Livelihoods Lead and the Comms and Influencing Coordinator), MEAL Coordinator, Programs Coordinator, steering committee members from the CBOs etc. will be constituted. The role of the Oversight Committee will include but not limited to:

- Screening and selection of consultants
- Reviews of inception reports
- Review, feedback, and sign-off of the desk review and literature.
- Sign-off of the tools, assessment, and profiling exercise.
- Check-in meetings with the consultant team during data collection, analysis, and report drafting
- Review of products including CBE profiles, baselines, OCAs, CBE database, and any Final Reports
- Sharing of tools, database and report and implementation of recommendations.
- Oversee the training and capacity development exercise.

7. BUDGET and Payment Terms for The Consultancy

The budget should be broken down and presented for the different phases of the project in the consultants' proposal

7.1. Payment schedule:

The consultant(s) will prefund some of the expenditures during and after the field mission, with all costs to be covered by the lump sum paid by OZA at the end of the contract, upon receiving the final landscape mapping reports, tools, database, CBO profiles, CBE OCAs, Case studies of satisfactory quality.

Payment terms:

- 20% upon signing of contract.
- 30% upon submission of the Inception Report outlining the research framework, methodology, and key considerations.
- 30% upon submission of draft report, stakeholder map, CBO Profiles, CBE baselines and presentation of findings
- 20% upon submission of final deliverables, finalization, and acceptance of the Final Report.

The consultant(s) will oversee organizing the accommodation and the means of transport related to the landscape Mapping, Profiling and baselining as well as budgeting in coordination with the OZA project oversight team.

* The invoice will have to be shared with OZA immediately for each completed stage of the landscape Mapping, Profiling and Baselining.

8. Results Expected Results/Deliverables

The Consultant will:

- Develop an Inception Report outlining methodology, tools, workplan, and timelines within two (2) weeks of contract commencement
- Conduct participatory data collection and stakeholder engagement
- Produce a draft Participatory Research Report and supporting outputs
- Present preliminary findings and facilitate validation processes
- Deliver final outputs, including:
 - Final Research Report
 - Three Community Assessment reports
 - CBO and CBE Profiles and baselines
 - Case Studies
- Participate in the dissemination and stakeholder engagement processes led by Oxfam South Africa

9. Logistics and Timelines

A provisional schedule for the landscape Mapping, should not exceed 4 months (Sep -Dec 2026). A detailed time/work plan is to be developed as part of an Inception Plan and it should include timelines for the completion of landscape Mapping, PAR planning, tool design, data collection for the profiling, baselining, and organizational capacity assessment, key results, draft report for each stage, development of final report, etc.

The duration of the Landscape Mapping and Participatory Action Research is 4 Months

10. Reporting and Coordination:

The consultant will report to:

- Senior Programs Manager

Regular coordination meetings will be held to monitor progress, address risks, and ensure alignment with project objectives.

11. Submission of Proposal and Selection of Consultant(s)

The bidding and selection process has 2 phases.

11.1. Phase 1. Submission of Proposals/Bids

Interested consultant(s) are invited to develop and submit proposals/bids (both technical and financial), which should be submitted to procurement@oxfam.org.za

The bid/proposal Selection criteria to be applied will consider:

- Quality of the methodological proposal: aspects that will help us to assess their suitability for the deliverables outlined in this TOR; this will include quality of the proposal, feasibility, etc.
- Profile and competencies of the consultancy team: knowledge, experience, composition, and other necessary competencies, etc.
- Suitability of the financial proposal: for the activities laid out in the methodology, within the financial possibilities of the program.

11.2. Phase 2. Engagement and Selection of successful Consultants

Three shortlisted consultants will be given an opportunity to refine and finalise their presentations for OZA. A successful consultant(s) will then be selected and awarded the Oxfam South Africa tender within the month of August. As part of their first deliverable, the consultant will be expected to submit an updated and/or detailed Inception Report with clear methodology, deliverables, and timelines for the Evaluation before the end of August 2026.

11.3. Interested consultants must submit:

- Technical proposal (Max 10 pages including cover, table of contents & back-end pages) in PDF format
- A proposed methodology and workplan
- CVs of team members
- Two pieces of evidence or links to similar assignments
- At least three contactable references
- Statement on conflict of interest

11.4. Eligibility:

- Demonstrated experience in participatory action research and community-based methodologies and inclusive facilitation approaches.
- Strong understanding of Just Energy Transition, Climate Justice, and energy access issues in South Africa.
- Proven expertise in gender-responsive and feminist research approaches.
- Experience designing and facilitating community engagement and capacity development using adult learning methodologies.
- Ability to translate complex policy and sector insights into accessible language and advocacy outputs
- Experience working with civil society, communities, and multi-stakeholder environments
- Ability to communicate fluently in one or two South African local languages besides English
- Strong analytical, research, and report-writing skills.
- Familiarity with South African policy and development context in the Just Energy Transition.

12. Application

Applications in the form of a proposal (technical and financial) need to be submitted via email: procurement@oxfam.org.za by 5 September 2026.

The applications, once received, will be evaluated; shortlisted applicants will be called for a brief presentation to discuss the study's approach and methods, as well as the scope of work's outcomes. Please do not hesitate to contact the project lead for more information or any queries in this regard.

NB: Consortia with experience in assessing and evaluating community initiatives, working with CBOs, CBEs, within the climate justice and economic development sector, including an understanding of social enterprises, are encouraged to bid.

Oxfam South Africa also reserves the right not to proceed with the Assessment and training after a successful bidding process.