

SUBCONTRACTING FOR EXTERNAL EXPERTISE

- Research expert on EWCs in the electricity and gas sector -
-

Tender specifications for the study on evaluating the experiences of European Works Councils on the internal market for electricity and gas and its consequences such as outsourcing, restructuring, mergers and acquisition, unbundling– a trade union perspective on information and consultation rights in EU member States and candidate countries - contributing to the project:

“European Works Councils of state, municipal and private energy companies facing mergers, restructuring and outsourcing - common perspectives and responses”

1. Background and purpose of the contract

The study is part of a project supported by the European Commission (budget heading 04.03.03.03) introduced by SDA with EPSU as partner in the framework of improving understanding on how do EWCs deal with restructuring, outsourcing and mergers and acquisitions, unbundling.

The purpose of the contract is to provide SDA and its partner EPSU and its affiliated trade unions and EWC representatives in the sector concerned with a study describing the consequences of the internal market for electricity and gas for the work of the EWC and in particular with focus on outsourcing, restructuring and mergers/ acquisitions. First preliminary results will be discussed during the conference for EWC and trade union representatives on 1-2 March 2005.

A Steering Committee made up of representatives of SDA and EPSU will oversee the project and give feedback to the research expert.

2. Description of tasks

The contractor will carry out the study for SDA and its partner EPSU. The task will consist of two parts:

1. desk based research comparing the different EWC agreements and the information and consultation rights plus facilities. Interview of EWC representatives on their experiences on restructuring, outsourcing and mergers and acquisition and

2. formulating proposals which will improve the functioning of EWCs in relation to the challenges of the internal market for electricity and gas experienced by EWCs.

Both task will be conducted in the light of the specific characteristics of the internal market of electricity and gas and its implications on employment, professional qualifications of the workforce and gender equality which are issues touching the work of EWCs. Furthermore, during the survey the opportunity will be used to evaluate the involvement of EWC members from the new Member States and candidate countries.

First stage: Initial investigation of key issues, November 2006 - February 2007

SDA and its partner EPSU will meet with the research expert to confirm the research outline, timetable and reporting procedures including regular interim reports to SDA and EPSU. During this phase, information will be collected using mainly desk-based research – monitoring of publications, websites and telephone or email contact with relevant actors. The progression of the survey will be supervised by an expert from EPSU.

The aim is to identify issues where EWCs have possibilities to strengthen their rights and facilities, and develop out of this concrete proposals on how address these key issues. Thus, the first stage of the research will enable SDA and its partner EPSU to formulate in cooperation with the research expert the direction of policy recommendations.

The research expert will have to make the first draft report available to SDA in early February 2007. This will allow SDA and EPSU to seek critical comments of EPSU's affiliated unions and EWCs. The final version will be due for June 2007 including information and comments provided during the conference.

Second stage: Policy recommendations, March 2007 - November 2007

The second stage of research should enable a clear formulation of the policy alternatives, in consultation with SDA and its partner EPSU and affiliated unions and EWCs. The policy recommendations could also involve options for EPSU on how to contribute to the regulatory framework of the internal market and the national legislation on information and consultation.

The final report is expected for June 2007.

3. Expertise required

The research expert will be expected to demonstrate:

- Experience with research of the internal market for electricity and gas, knowledge of its regulations, benchmarks and major players active in the market;

- Experience with research of companies in the sector concerned
- Experience with the work of EWCs
- Experience in conducting interview-based research;
- Experience with the work of trade unions

4. Time scheduling and reporting

| <i>Task</i> | <i>Time</i> |
|---|------------------------------|
| Selection of research expert | mid December 2006 |
| Discussion of outline and survey with research expert | end December 2006 (Brussels) |
| First draft report | first week of February 2007 |
| Presentation of first draft report on conference | beginning of March 2007 |
| Draft of final report | June 2007 |

5. Payment and standard contract

The payment will be in several instalments (initial, upon presentation of the draft report, upon presentation of the final report, upon presentation of the policy part). The payment follows a standard contract that SDA will draw up with the research expert.

6. Price

The estimated price is 5.200 Euro.

7. Selection criteria

The contractor would be expected to demonstrate:

1. Experience of working with trade unions;
2. Profound understanding of the European electricity and gas sector including specific countries, companies, social consequences;
3. Knowledge of EWCs
4. Ability to comment on political developments in the European decision-making process;

No sub-contracting will be allowed.



8. Award criteria

The research expert will be expected to meet all four selection criteria.

9. Content and presentation of the bids

This will be as set out in point 2 above, namely a detailed description of the project outline with the different stages for the study. SDA and its partner EPSU will collect offers of possible research experts and will also publish a call for tender for the study on the SDA and EPSU websites.

10. Deadline and address for submission of application

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