

REF: OP/EUI/LIB/2019/001

Open Call for Tender for the Supply of Books
to the Library of the European University Institute

Tender Specifications

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A INTRODUCTION

The tender concerns book supply services for the library of the European University Institute (hereafter referred to as “EUI Library”), in particular the supply of books in paper format, as well as the supply of e-books via an electronic platform.

1. Preamble

- The tender will result in a multiple framework contract in cascade, divided into lots
- A tenderer may apply for one or more lots (See Section F)
- Orders will be offered to the Supplier who is ranked first in the related lot. If the first Supplier cannot fulfil the order, the order will be sent to the Supplier ranked second. The same rule will be applied in cascade.
- Technical and economic specifications must be submitted for every lot.
- Optional added-value services may be offered in combination with required services.
- When submitting the tender, the economic proposal should be presented separately from all other information. When preparing information relating to price, it should be clear to which lot it refers.
- The terms used in these specifications are defined in Section E of this document.

Analysis of the 2018 expenditure indicates that the EUI Library has spent approximately 280.000 EUR in the supply of books, and e-books (individual titles)

The yearly amount of money involved, based on the previous years is around 280.000 EUR (including 255.000 EUR print books, and 25.000 EUR e-books ordered individually).

Average cost spent in previous years for print books:

- Lot 1 ca. 209.000 EUR
- Lot 2 ca. 8.000 EUR
- Lot 3 ca. 29.000 EUR
- Lot 4 ca. 9.000 EUR

Another 70.000 EUR was spent on e-book packages (See Section B.2).

It must be stressed that whilst the figures above are genuinely believed to be accurate, the total annual budget amount cannot be guaranteed and this data is thus provided as an indication.

2. Technical proposal information

2.1 Specifications to be submitted for every lot

- Book supply (compulsory)
- Added-value services (optional)

These are explained in the following paragraphs.

2.2 Added-value services

Added-value services are services which may be offered, such as e-books, physical processing of selected items, out-of-print books, etc.

3. Economic proposal information

3.1 Basis for price

Suppliers are requested to offer a price based on the Publisher's list price (Section E).

The supplier should define a percentage of the Publisher's list price they will charge the EUI Library – for example, an offer at "100%" means the EUI Library will pay the Publisher's list price. An offer of "95%" means the EUI will receive a 5% discount on the Publisher's list price for all supplied items. This percentage rate is for an **all-inclusive** price - no extra charges for handling, delivery etc. will be accepted.

4. Exclusion, selection and award criteria

4.1 Exclusion criteria

Exclusion criteria are general criteria related to legal and financial requirements stated in the tender documentation. Exclusion criteria are eliminatory (see Annex 3 – Declaration concerning Exclusion Criteria). **Evidence for the Exclusion criteria has to be provided by the appointed tenderers before the signature of the Contract.**

4.2 Selection criteria

The Library needs an experienced supplier focused on the high quality of the service. In order to be eligible for the tender procedure, companies **must possess and provide evidence** for all the following requirements:

- A minimum of five years in business.
- Over the previous three years (2016-2018), the company's overall turnover, excluding VAT, was not lower than €500.000 (five hundred thousand) per year.
- At least five years of experience in providing book services to international academic and research libraries.
- Proficiency in English of your customer service staff dealing with this contract is essential.
- An online platform for book selection, ordering and cataloguing, whose quality will be evaluated according to the award criteria. Please provide the name and link to the platform.

4.3 Award criteria

Award criteria take into account both the technical and economic proposals submitted.

The contract will be awarded to the tenderer submitting the bid that offers the best value for money.

Award criteria are specified in Section D. A summary is given in Section D.3.

The award criteria will be the basis for the ranking of suppliers in the framework contract.

5. The assessment process

5.1 Lots

Proposals will be assessed on a lot-by-lot basis (a Supplier may have a high rating for one lot and a lower rating for another lot). Lots are specified in Section F.

5.2 Exclusion and Selection

Exclusion criteria are eliminatory.

Tenderers which do not meet the Selection criteria will also be eliminated.

It is necessary that all required information is supplied and attention is paid to the required procedures.

5.3 Score

The maximum score is 100, composed in the following way:

Technical proposal: Maximum Score of 70

Economic proposal: Maximum Score of 30

See Section D for details.

B TECHNICAL SPECIFICATIONS

1 Required services - Book Supply

Provide us with a general overview of your company activity, strengths, and how it can comply with the EUI Library's requirements.

1.1 Supplier's specialisation

Suppliers may apply for one or more lots. Each lot should be clearly indicated. Lots are listed in Section F.

Note that an offer for each lot should be based on fulfilment of at least 90% of received orders.

- i. Provide us with an estimate of your total stock and indicate where it is located.
- ii. Provide an estimate of the percentage of academic books in the area of social sciences as a proportion of your current stock.
- iii. Please describe your arrangements with publishers and/or distributors in cases where books are not in stock. Please indicate how quickly these may be supplied, in approximately 90% of cases, and what guarantees can be offered.
- iv. Please supply the names and addresses of three academic libraries among your customers in Europe that may be contacted.

1.2 Platform for book selection, ordering and cataloguing

The Library Information System currently in use is Symphony/Blue Cloud, a product of SirsiDynix. Compatibility with this system will be considered an advantage. Indicate whether you have any specific features for other systems ; or if you can comply with any possible systems. If necessary, further information on EUI systems can be requested from the Client prior to submitting the proposal.

The Client adopts RDA (Resource Description Access). Records are created in MARC 21 format. Authorities (Names, Subjects, Titles) are based on LC Authority File. Classification is done on according to the Dewey Classification scheme, 23rd edition. Other classification schemes are adopted by the Library for specific collections (law collection, EDC collection, and statistics collection).

- i. Describe the online catalogue of items offered for purchase, including stock availability. If available, please provide instructions (URL, username/password, etc.) for trial access to your platform.
- ii. Describe how the catalogue can be searched and clearly indicate whether you provide search facilities by: keyword, Dewey classification, subject headings, publisher and possibility to limit by date range (dd/mm/yy) of publication or profiling.
- iii. Describe any service for profiling the clients' interests in terms of subject and non-subject parameters (e.g. classification, subject headings, audience) and indicate how long it takes for a title to be profiled with respect to the publication date.
- iv. Describe any service you provide related to approval (or virtual approval) plan and alerts based on profiles for new titles announcements (NTAs), their frequency, subject coverage, targeted audiences, etc.
- v. Indicate whether you can provide a real-time check of the EUI Library Catalogue at the title level from within your own platform, via Z39.50 or other means.
- vi. Describe the direct online ordering process.

- vii. Describe any service for providing MARC and order records directly to the Library system. Describe details of MARC records provided (basic, full, subject headings included, etc.).
- viii. Supply a sample of ten recent catalogue records created (ensuring a mix of record types).
- ix. Describe any service for classifying items according to the Client's scheme (details on request) and providing data directly to the Library system.
- x. Describe any service for supplying supplementary data on item content upon delivery of full MARC records: abstracts, tables of contents, images, book covers, etc.
- xi. Indicate whether you contribute with MARC records to OCLC

1.3 Before an order is placed

- i. The Client may request information prior to placing orders with respect to the availability of a title, price, etc. A reply to information requests must be given within three working days for orders.

Clauses

- a. Failure to meet the stated deadline for responding to an information request may be regarded as a default (see B1.19), and may lead to the enquiry being redirected elsewhere without further notice. (Note that an acceptable response may be to acknowledge the request and state that the information is not immediately available. In that case a new deadline for substantive response must be offered. The Client will communicate if this deadline is not acceptable).
- b. An information request is not an order or a commitment to order.
- c. Price quotes in response to enquiries must be firm, and should indicate both the Publisher's list price and the fully-inclusive price to be paid by the Client.

1.4 Placing an order

- i. Orders are placed by secure electronic means (EDI), or by e-mail.
- ii. Describe the process of receiving electronic orders provided by the Client according to the EDIFACT standard.
- iii. When requested, receipt of orders must be confirmed. Specify whether an order-receipt acknowledgement is offered.

Clauses

- a. Orders for documents will give the Publisher's list price, as known by the Client. The pricing formula must be applied to these prices and be stated in the invoice.
- b. It is the Supplier's responsibility to establish the Publisher's valid list price, and to ensure that charges to the Client are based on this or on a lower price.

1.5 Price variation

- i. Describe your communication policy related to price variations (in cases where the actual price is higher than the price on the order).

1.6 Pending Orders

- i. On request, the Supplier shall supply within five working days a report of all outstanding orders, including price, date of order and agreed dispatch date (if any).

1.7 Fulfilment and delay

For the research carried out at the EUI the fast delivery of ordered books is very important.

- i. Book supply
 - 1) Describe arrangements for the normal frequency of shipments. Description should include:
 - timeframe of shipping (weekly, daily, etc.),
 - minimum shipment size/value,
 - if shipping is done only in case of completed orders. Prompt shipment of available items is preferred.
 - 2) Normally, dispatch of items is expected to be within a maximum of four weeks of the order date. If an order is not likely to be dispatched in that time the Client must be informed. This report should be dispatched within ten working days from the receipt of the order. The reasons for the delay must also be clearly stated (examples include items 'not yet published' and 'out of print'). Describe your dispatch procedure.

Clauses

- a. If the Supplier does not communicate a likely delay which is accepted by the Client, and the order (or an item in it) is not dispatched within four weeks for Standard orders, and by the agreed date for Rush orders, this constitutes a default (see B1.19).
- b. Orders for items that fail to meet accepted deadlines for delivery may be cancelled or returned without penalty.

1.8 Delivery and transport

- i. The standard delivery method used must be one that ensures arrival at the EUI within four working days of dispatch. The method of dispatch must also include a verifiable date of dispatch. N.B. Please indicate if a faster delivery can be provided.
- ii. Each package or container delivered shall be marked by the Supplier with the address:

European University Institute
The Library - Acquisitions
Via dei Roccettini, 9
50014 San Domenico di Fiesole (FI)
Italy

- iii. A delivery slip or original invoice including the EUI order number(s) must be included in the book or in the parcel (it may also contain the list of the whole content of the parcel).
- iv. The Supplier has full responsibility for items up to the point of acceptance by an authorised officer of the EUI. Record of delivery is the Supplier's responsibility: all queries must be responded to within five working days.

Clauses

- a. Insurance of items in transit is the responsibility of the Supplier and at the Supplier's expense.
- b. The Supplier is liable for any loss and/or damage to goods due to inadequate packing, marking or loading carried out or arranged by the Supplier, wherever the loss/damage occurs.
- c. Failure to observe the time limits for dispatch constitutes a default (see B1.19).

1.9 Cancellation clauses

- i. The Client may cancel any un-dispatched stock item by communication in writing, without penalty.
- ii. In exceptional cases, the Supplier may need to seek the agreement of the publisher/distributor beforehand. Where the publisher/ distributor will not accept a cancellation, the Supplier has the right to refuse a cancellation by the EUI.
- iii. In all cases where communication or fulfilment deadlines have not been met, the Client has the right to cancel an order without charge, including specially ordered items.

1.10 Guarantee and returns clauses

- i. If books are supplied which on delivery are found to be faulty or damaged or which otherwise fail to comply with the contractual requirements, the defective goods must be replaced by the Supplier at its own expense not later than 20 (twenty) working days after notice from the Client regarding the defects in the goods. If the supplier does not remedy the defect(s) in the goods, the Client shall be entitled to cancel the order. The Supplier is liable for the cost of return of defective goods in such cases.
- ii. The Supplier is liable for the cost of returning incorrectly supplied goods.
- iii. If items have been correctly supplied, and their return is subsequently requested by the Client, the Supplier shall accept items that have been supplied from stock. In cases where the Client requests return of a special item, the Supplier may seek the agreement of the publisher/distributor. In case the publisher/distributor does not accept a return, the Supplier has the right to refuse a return by the EUI.
- iv. In all cases of the return of correctly supplied goods, the cost of return to the Supplier shall be borne by the EUI.
- v. A credit note shall be issued immediately on receipt of an item accepted for return.
- vi. The delivery of incorrect items constitutes a default (see B1.19).

1.11 Order-status information

- i. Describe any facilities for consulting online the order status of items.
- ii. Describe any facilities for providing vendor status reports, according to the EDI standard, or, if not available, by other electronic means.

1.12 Invoicing

- i. The Supplier must supply the EUI with original invoices. Each invoice shall be prepared as specified below. The Supplier shall present the invoices to the EUI upon delivery or partial delivery of the order.
- ii. Dispatch must be no later than three working days after the date of invoice.
- iii. Invoices may arrive with the books to which they refer (in the same delivery) or may be sent by electronic means, if a delivery slip is inserted in the package or in every book.
- iv. Upon request, the Supplier must be able to send the original invoice exclusively in PDF format by e-mail.
- v. The Supplier may invoice in the currency of their country of origin. Different conditions may be defined in the contract.
- vi. Invoices must always specify:
 - The client address as specified in Section A.1.8.ii
 - The EUI fiscal code 800.204.104.88

- The EUI order number
- The title/author (short)
- Edition (if relevant)
- Volume / Number or specific title, in case of multi-volumes works or series.
- The Publisher's list prices for all items plus the total.
- VAT rate applied and mention of EUI's VAT exemption when applicable (see Draft Contract Art. 1.4)
- The total price, having applied the pricing formula agreed in the Economic proposal. The currency must be clearly indicated.
- The exchange rate applied (reference: *Euro foreign exchange reference rate by ECB* <http://www.ecb.eu/stats/exchange/eurofxref/html/index.en.html>)
- IBAN, BIC/SWIFT numbers for the Supplier
- Supplier's VAT number

Clauses

- a. An incorrectly prepared invoice will not be paid until a corrected version has been provided. The incorrect invoice should be cleared by a credit note and a correct invoice should be delivered.
- b. The Economic proposal establishes a pricing formula for book supply to cover all costs of purchase, packaging, dispatch, customs duties, delivery, etc. No additional charges other than specified here will be accepted. (See Section C.1)
- c. Terms unilaterally included in invoices by the Supplier are not binding on the EUI, even when publishers have applied them to the Supplier.

1.13 Electronic invoicing

- i. Describe any service for supplying electronic invoices according to the EDIFACT standard and/or to other EDI formats supported by Symphony/Sirsi Dynix. Please supply samples of electronic invoices.

1.14 Payment

- i. The term of payment is within 60 (sixty) days of receipt of invoice, in cases where correctly prepared and accurate invoices have been received by the EUI. Please indicate if better conditions can be offered.
- ii. Indicate the forms of payment accepted (wire transfer preferred).
- iii. Describe your practice regarding statement of account for unpaid invoices.
- iv. Payment shall be in the currency of the invoice: however, in particular cases (problems for our Bank in paying certain currencies), the payment may be made in the equivalent of Euro calculated by the Bank, or using the official monthly exchange rate applied by the EUI corresponding to the month indicated of the invoice date.

Clauses

- a. Invoices will only be paid upon arrival of all items.
- b. If an incorrect or faulty item has been delivered, no part of the invoice in which it is listed will be paid until a replacement or credit note has been received unless otherwise agreed in the specific case.

1.15 Performance on book supply

- i. For all book supply services, at least 98% of transactions must be completed as specified, without error or default.
- ii. Describe how reports on service performance against the specifications will be provided (see B1.19).
- iii. The Client reserves the right to monitor all transactions, or take a random sample of transactions or selected transactions under the Agreement. Monitoring may be concentrated on transactions/suppliers which are giving cause for concern or which have an impact on current priorities.

Clauses

- a. Failure to provide service performance data and management information will constitute a default.

1.16 Quality

- i. **Experience.** Describe for how many years you have provided these kinds of services.
 - Provide details of business dealings, relevant to this contract (e.g. similar customers, similar content of academic titles supplied for countries indicated) in the last three years.
 - Provide any information on the stability of your client list during that time.
 - Provide any evidence of client satisfaction with the services delivered.
 - Provide any names and contact details of clients that we may contact for information regarding your performance.
 - Provide evidence of any experience of dealing with international organisations.
- ii. **Policy.** Provide details of:
 - Any written policy on quality.
 - Any external assessment or certification of quality (e.g. ISO 9001 certificate).
 - Approach to assuring quality in meeting this Agreement.
- iii. **Association.** If applicable, provide information on the Supplier's membership of a trade association or similar.
- iv. **Staff.** If relevant, provide details of the standards set for personnel management of staff responsible for the execution of this Agreement. In particular, specify standards set for competence, training and development, and particular strengths, amongst the staff dealing with services described in this Agreement.

1.17 Management information

- i. Where total expenditure by the EUI with the Supplier is, or is likely to be, more than 50,000 Euro per annum, on request, in April, July, October and January, the Supplier shall report for the previous Quarter and Year to Date:
 - total orders placed by the Client (number and value)
 - total orders fulfilled
 - total orders cancelled/returned
 - total orders outstanding

1.18 Contacts at management level and resolution of disputes

- i. The Director of the Library is ultimately responsible for the performance of contract. Day-to-day placement of orders and other routine business will be handled by authorised Library staff members.

- ii. The Supplier must provide the name of a permanent staff member responsible for the execution of the contract. Separate contact names should be given for overall contract management and for day-to-day business. Any change to the nominated contacts must be communicated in advance.
- iii. The language of communication shall be English, Italian, French or German, as specified by the EUI. Reasonable efforts will be made to match the language preference (English, Italian, French or German) of the Supplier, but a match cannot be guaranteed.
- iv. Except as specified elsewhere, or as agreed, the Supplier must reply to e-mail or telephone call from the Client within five working days.
- v. For orders/contracts placed for a value of more than 10,000 Euro per annum:
 - The Client may, at its discretion, require a meeting to discuss contract performance. This may be a periodic meeting (normally no more than once or twice per annum) or exceptionally a meeting may be called to resolve a specific issue or issues (no more than once per month).
 - The Supplier shall ensure the attendance of a suitably authorised person at such meetings.
 - The Supplier shall produce a note of the main items discussed and action points arising from each meeting, within five working days. These notes are to be regarded as definitive after written agreement of the Client.
 - The Supplier's expenses in attending such meetings will be borne by the Supplier.
 - The location of meetings shall be either the EUI or the Supplier's premises, at the discretion of the Client. Another meeting place may be arranged by mutual agreement.
- vi. Describe any proposals to ensure a good and creative working relationship with the Client.

1.19 Defaults and penalties

General

- i. Failure to deliver as specified may lead to order cancellations.
- ii. Failure to invoice as specified may lead to late or contested payment

Minor and major defaults

- iii. Beyond these "penalties" arising from normal operations, a system of default. Any failure to deliver as specified, required or agreed, or according to normal business or legal standards, may be regarded as a default. A distinction is made between minor and major defaults:
- iv. Main categories of minor defaults are:
 - Generally, services, facilities or pricing not as described or required
 - Generally, performance standards not as described or required
 - Failure to respond to information requests
 - Failure to provide correct information (See B1.3-B1.4)
 - Not communicating as required, within the stated time limits (See B1.3-B1.7)
 - Failure to dispatch on time (See B1.7-B1.8 and B.2.5)
 - Late delivery of ordered books (B1.7 and B2.5)
 - Failure to present invoices as required (See B1.12)
 - Failure to deliver a significant proportion of the titles ordered by the Client
 - Failure to activate access to full-text of e-books in a timely manner (in accordance with the Technical proposal) (See B2.2)
 - Delivery of incorrect items (See B1.10)

- Failure to provide service performance data and management information as described or required. (B1. 15)
 - Pricing/charging which is not based on the agreed policy (See C.1)
- v. Major defaults include:
- Misrepresentation of past experience, client base, content, validated quality standards, (See B1.16), significant failures on pricing, etc.
 - Failure to provide customer service and communications (See B1.3-B1.7).
 - Failure to provide IT services (online services, electronic invoicing, etc. in accordance with the Technical proposal).
 - Failure to present invoices (See B1.12).
 - Significant failures on pricing.
 - persistent minor defaults in an area of ordering, supply or service following a performance warning from the Client
- vi. The Client will record defaults during the contract period.
- vii. Following the recording of five minor defaults, or one major default, the Client shall inform the Supplier with a performance warning and indicate areas for improvement
- viii. A points system will apply with minor defaults valued at **10 points** and major defaults at **50 points**.
- ix. If a Supplier has accumulated 100 default points in any twelve month period, and these relate to more than 2% of all transactions with the Supplier, or relate to major defaults, the Client will inform the Supplier of the recorded defaults. A penalty notice will be sent after one week. All invoices relating to transactions starting from the first day of the month preceding the penalty points notification shall have a 1% discount applied. A credit note shall be issued within ten working days of notice by the Client.
- x. If subsequently the total of 200 default points is reached the discount shall be 2.5%, 300 default points 5%, 400 default points 7.5% and so on.
- xi. The Client reserves the right to terminate the Contract following the award of 200 default points in any twelve months, in accordance with the procedure described in the Draft Supply Contract, II.14.1. In this case the orders will be transferred to the Supplier ranked second. The same rule will be applied in cascade.

2 Optional added-value services

2.1 Introduction

- i. The EUI benefits from added-value services, and would like to keep and improve these in the future. Indicate which services you are prepared to offer, if any.
- ii. Pricing policies and costs for all such services must be provided for each service separately and be presented in a separate chapter within the Economic proposal (See Section C.2).
- iii. Each service offered will be assessed separately. The assessment for the added-value services is separate from the assessment for the required services. Addressing these is not compulsory, but a maximum score of 10 (ten) will be assigned to the Technical offer, and a maximum score of 3 (three) to the Economic offer (see Section D.1.3; 2.3).

2.2 E-Books

- i. The EUI Library is interested in a title-by-title purchasing model, granting perpetual access to the individual e-books purchased, as well as in acquisitions of e-book packages.
- ii. Describe your e-books services in terms of purchase models, acquisition options, and agreements with publishers and aggregators, including the terms of use.
- iii. Specify from which publishers you provide individual e-books offering access directly from their platform.
- iv. Specify from which publishers you provide e-book packages offering access directly from their platform.
- v. Describe your workflow for processing e-book orders (activation of access to full-text, supply of MARC records, delivery of e-books usage statistics in accordance to COUNTER standards, any other services available).

2.3 Physical processing

- i. The Client processes its new books as follows:
 - insertion of 1 security RFID tag (*Bibliotheca*) with barcode on inside front cover
 - rubber-stamp on reverse title page, plus one other pageIf relevant, describe any service for providing any of these features.
- ii. Please specify in the economic proposal which services can be offered and how each of them influence the total price.
- iii. Describe your policy for dealing with returns and cancellations of items that have already received physical processing.

2.4 Standing orders

- i. If relevant, describe any service for standing orders for annual and monographic series.
- ii. Annual and monographic series orders are placed on the basis of year of publication.
- iii. Describe transition arrangements in case standing orders are being taken over from previous suppliers.

2.5 Rush Orders

- i. In exceptional cases the Library requires to obtain a title urgently. Describe your rush order procedure in terms of ordering, dispatch/online access activation. Delay in dispatch of a book, or online access activation may constitute a default (see B1.19).

2.6 Out-of-Print books

- i. Describe whether you offer a service for Out-of-Print books and provide information on how these can be ordered.

2.7 Other added-value services

- i. Please describe any further added-value services you wish to offer.
- ii. If relevant please describe any further service which may be compatible with the EUI Library system.
- iii. If relevant please describe any further service which is compatible with the EDI standards.

C ECONOMIC SPECIFICATION

1. Required services economic proposal

1.1 Pricing formula for book supply

State the pricing policy for book supply, in this format:

Publishers list price @ xxx%

(For example, "Publishers list [price@95%](#)", or "Publishers list [price@105%](#)")

The rate xxx% should take into account all discounts and all costs, up to and including delivery to the EUI. This rate will apply to all orders and contracts.

Proposals submitted in other formats will not be accepted.

1.2 Pricing policies for book supply

- i. The main base of the pricing, used for all material published or routinely distributed, is the Publisher's list price.
- ii. In the absence of a Publisher's list price, or in case of dispute, the base price shall be the marked cover price in the Supplier's stock, or, failing that, the lowest advertised price for public sale.
- iii. The pricing formula will be followed in all orders/contracts. However, such a formula represents the maximum acceptable price: lower rates may be offered by the Supplier if agreed for specific orders/contracts.
- iv. The formulae based on fixed percentages of Publisher's list price will not be reviewed. (The Publisher's list prices themselves may of course change.)
- v. Describe the pricing policy with regard to materials that must be specially imported into the EU; i.e., items with no Publisher's list price in the EU. (If these cannot be offered, state 'service not offered').

2. Added-value services economic proposal

Please provide prices for each of the added-value services offered, as described in Sections B. 2.1-2.7 (e-books, physical processing, standing orders, rush orders, out-of-print, any other services). For e-books please indicate if you offer a discount on the list price, in case of title-by-title purchases. In case of e-book packages, please indicate whether you have any special agreement with publishers.

D AWARD CRITERIA

1. Technical proposal award criteria

1.1 Score for technical proposal

Maximum Score = 70

N.B. Decimal score is allowed (e.g. 0, 5)

1.2 Required services award criteria

- | | |
|---------------------------------------------------------------------|----------|
| • Relevant stock and arrangements for supply from publishers (B1.1) | Score 3 |
| • Online platform (B1.2) | Score 15 |
| • Information, communication (B1.3-1.6) | Score 3 |
| • Fulfilment and delivery (B1.7-1.8) | Score 15 |
| • Cancellations, returns (B.1.9-1.10) | Score 2 |
| • EDI order status report (B1.11) | Score 3 |
| • Invoices, EDI invoicing, payment (B1.12-1.14) | Score 10 |
| • Performance and quality aspects (B.1.15-1.18) | Score 9 |

Total for required services award criteria: Score 60

1.3 Added-value services award criteria

- | | |
|-----------------------------------------------------------------|-----------|
| • E-Books (B2.2) | Score 8 |
| • Physical processing (B2.3) | Score 0.5 |
| • Standing orders (B2.4) | Score 0.5 |
| • Rush order (B2.5) | Score 0.5 |
| • Out of print books and other added-value services (B2.6-2.7): | Score 0.5 |

Total for added-value services award criteria: Score 10

2. Economic proposal award criteria

2.1 Score for economic proposal

Maximum score = 30

- Price should be offered according to INTRODUCTION (A.3.1.) and ECONOMIC PROPOSAL (C.1-2)
- The economic proposal will be scored for book order supply according to the following formula:

$$\text{Score} = \frac{(100-\text{Price})}{(100-\text{MinPrice})} \times \text{MaxScore}$$

Where:

Price = The percentage value of the price offered by the individual tenderer.

MaxScore = The maximum score assigned (27 for Books supply).

MinPrice = Lowest percentage value of the price offered in the tendered bids.e.g.:

- Economic proposal for Standard services of the assessed tender = price@95%

- MinPrice for Book supply = price@80%

- MaxScore for Book supply = 27

$$\text{Score} = \frac{100-95}{100-80} \times 26 = \frac{5}{20} \times 34 = 6,5$$

2.2 Price award criteria for required services

- **Price for required services: Maximum Score: 27**

<i>Services</i>	<i>Score</i>
Book supply	27

2.3 Price award criteria for added-value services

- **Price for added-value services: Maximum Score: 3**
The following services will be evaluated; the score of each service will be:

<i>Services</i>	<i>Score</i>
E-books	1
Physical processing	0.5
Standing orders	0.5
Rush orders	0.5
Out of print books and other added-value services	0,5

3. Summary of award criteria

- **Technical proposal:** **70**
 - Required services: 60
 - Added-value services: 10

- **Economic Proposal:** **30**
 - Required services: 27
 - Added-value services: 3

<i>Proposal</i>	<i>Service Type</i>	<i>Feature</i>	<i>Score</i>
Technical	Required	Stock (B1.1)	3
		Online platform (B1.2)	15
		Information, communication (B1.3-B1.6)	3
		Fulfilment and delivery (B1.7-B1.8):	15
		Cancellations, returns (B 1.9-B1.10)	2
		EDI order status report (B1.11)	3
		Invoicing, EDI invoicing, payment (B1.12-B1.14)	10
		Performance and quality aspects (B1.15-B1.18)	9
	Added-Value	E-books (B2.2)	8
		Physical processing (B2.3)	0.5
		Standing orders (B2.4)	0.5
		Rush order (B2.5)	0.5
		Out of print books & Other added-value services (B2.6-2.7)	0.5
	Total		70
Economic	Required	Standard price (C1.1)	27
	Added-value	E-books (B2.2)	1
		Physical processing (B2.3)	0.5
		Standing orders (B2.4)	0.5
		Rush order (B2.5)	0.5
	Out of print books & Other added-value services (B2.6-2.7)	0.5	
Total		30	
Grand Total (Technical + Economic)			100

E TERMINOLOGY

Authorising Officer – refers in practice to the head of service in charge of the launching and awarding of the contract within the limits of the powers of signature to him/her.

Best value - achievement of purpose at lowest available cost. NB achievement of purpose is primary. “Cost” rather than “price” is used, because costs inside the Library are also considered.

Book - printed monographic volume.

Client - Director of the Library of the European University Institute, or an official authorised by the Director. 'Authorised officials' will be identified to Suppliers with a description of their roles.

Credit note - a note providing refund, valid against present or future invoices from the Supplier, without restriction. A “credit note” which takes the form of an extension of a specific subscription, or which is valid only for limited purposes, is not normally acceptable.

E-book – monograph in electronic format

EUI - European University Institute

European Union, EU, - the European Union of 28 member states (at the time of publication of Tender)

Library - the Library of the European University Institute.

May - the use of “may” indicates that the specified item is *optional*. (See also “must” and “should”).

Must - the use of “must” indicates that the specified item is *mandatory*. (See also “should” and “may”). Mandatory items include e.g. minimum service standards, requirements to provide information, particular service features, and requirements to present price offers in a particular format. These items are intended to be Selection criteria.

Publisher's list price - the recommended retail price advertised by the publisher or distributor, or the price printed on, or in, the item, whichever is the lower.

Rush orders – items ordered with rush procedure.

Series - books issued successively by the same publisher, in a uniform style and usually bearing a collective series title.

Should - the use of “should” indicates that the specified item is *desirable*. (See also “must” and “may”). Desirable items include e.g. some service features, some standards above the mandatory level, etc.

Specification – set of requirements related to each Lot and each type of supply.

Supplier - the tenderer: suppliers, book dealers, publishers, wholesalers, bookshops.

Working days - are Monday-Friday, excluding recognised national public holidays in the country of the supplier or Client, as relevant to the case. The passing of “one working day” is from the time of initiation on the first day to the same time on the next working day.

F LOTS

- Lot 1: Books published in the United Kingdom, USA, and/or English language (excluding English language books published in Belgium) (81%)
- Lot 2: Books published in France and/or French language (7%)
- Lot 3: Books published in Germany and/or German language, East Europe and/or Eastern European languages, Scandinavia and/or Scandinavian languages, The Netherlands and/or Dutch language; Belgium and English language (8%)
- Lot 4: Books published in Southern European countries and/or related languages (4%).

- N.B.
1. Percentages refer to orders in 2018;
 2. The publications of the European Union (Publications Office or OP), and of the Council of Europe are excluded from the tender;
 3. The Client reserves the right to exceptionally place orders for very urgent, out of print and/or rare books, or e-books with a bookshop of its choice, or directly with the publisher.
 4. The Client reserves the right to exceptionally take advantage of promotional offers by publishers in case the awarded tenderer is not entitled to grant the same discount.