

**REF: OP/EUI/LIB/2022/001**

**Open Call for Tender for the Supply of Periodicals, Databases and Electronic Resources to the Library of the European University Institute**

Lot 1

NAME OF THE TENDERER:

**Instructions**

- The offer for each Lot must be submitted in a separate form.
- Read carefully the whole Tender Specifications document, before filling in this form.
- Provide as many details as possible, including examples, for each numbered requirement.
- If necessary, complement the provided information by filling in the general description fields.
- When making reference to other documents, make sure that the documents are included in the documentation submitted as part of the tender proposal. Do not provide links to external documents.
- The tenderer must sign at the end of this form and include a non-authenticated photocopy of the valid ID document of the signatory.

**Introduction: General description of your Company**

## Ordering and supplying

### 6.1 New orders

Questions	Responses
Describe your general procedures step by step for setting up new subscriptions. Indicate the time taken for each step.	
The Library requires its Supplier to move the Library's subscriptions to a calendar year regardless of when the subscription was taken out. Outline how this will be put into effect.	
State your policy on accepting orders for material not listed in your database.	

### 6.2 Renewals

Questions	Responses
Describe your procedure step by step in order to comply with these requirements. Indicate the time taken for each step.	
Describe how your Subscription Management System could be of assistance to the Library in the annual renewal exercise.	
With reference to annual renewals, describe how you would deal with non-calendar year subscriptions.	

#### 6.4 E-journals

Questions	Responses
Describe in detail the subscription workflow from ordering to access activation of e-journals. Indicate the time taken for each step.	
Describe how you would provide the Library with any e-journal updates, trials and deals, which may be offered by publishers. Include information on the publisher's launch of an electronic version of a print subscription.	
Describe in detail the different kind of information provided on e-journals in your Subscription Management System. Include access and licence information (e.g. post-cancellation access rights, etc.).	

#### 6.5 Back issues

Questions	Responses
Do you provide electronic access to archival material?	
Do you provide a reprint or a second-hand search service for out of print issues? If so, describe in detail your policy and procedures.	

### 6.7 Delivery services

Questions	Responses
Describe your agreements with publishers in terms of delivery of items.	
Specify the number of days between publication date and dispatch for direct delivery.	
Describe in detail your procedure for consolidating orders into single shipments.	
Describe how you deal with shipments from outside the EU e.g. handling of customs clearance.	

### 6.8 Claims and troubleshooting

Questions	Responses
Describe in detail your claiming procedure in order to comply with the requirements. Indicate the time taken for each step.	
Describe your procedure when there is no satisfactory reply from the publisher.	
Describe your Subscription Management System with reference to claiming options and history.	

**6.9 Invoicing**

<b>Questions</b>	<b>Responses</b>
Send a sample of an invoice.	
Describe the workflow process for making EDI (EDIFACT/X12) electronic invoices available for download on your ftp server.	
Specify the time range between the delivery of the original invoice and making an electronic invoice file available for download.	
Describe how you keep the Library informed about the state of account and eventual overdue payments.	
Specify the description of wrongly invoiced items on a credit note.	

**Services**

**7.1 Quality and Customer Service**

Questions	Responses
Indicate for how many years you have provided customer services and describe business dealings relevant to this contract (e.g. similar customers, similar content supplied) in the last three years.	
Provide any information on the stability of your client list during that time and provide evidence of client satisfaction with the services delivered.	
Describe how you assure quality control and state your prerequisites for your Customer Service representatives such as qualification, turnover and experience, etc.	
Provide information on the Supplier's membership of a trade association or similar.	
State if your staff/team have any ongoing professional training in particular related to customs regulation.	

**7.2 Communication policy**

Questions	Responses
Describe your communication policy in terms of promptness and efficiency in general.	
Describe specifically your procedures for dealing with online access problems, price quotations and quotations for back issues.	

### 7.3 Bibliographic services and management information

Questions	Responses
<p>Activate temporary access to your Subscription Management System, and provide instructions along with URL and Username/Password.</p>	
<p>State the size (total number of titles and of active titles) of your Subscription Management System.</p>	
<p>Describe the features for viewing the Library's subscription information online, including invoices, claiming history and access and licence information (platform, URL, etc.).</p>	
<p>Describe the provision and content of your management information reports, including reports on new titles in the relevant subject areas and expenditure reports. Describe their structure and accessibility.</p>	
<p>Describe if you provide customized reports and an alerting service for titles based on language, geographical region, subject categories (e.g. diversity and inclusivity) or other customization.</p>	
<p>Do you provide usage statistics reports? Declare if this service is free or if any charges are applied (no price quotations required).</p>	



#### 7.4 Journal packages

Questions	Responses
Describe your services and procedures for the administration of packages negotiated by the Library. Include how you manage the annual renewal and license negotiations, the processing of title lists, discounts, etc. with publishers for the Library.	
Indicate how you can assist in the handling of journal subscriptions that are part of a Transformative Read & Publish agreement as opposed to traditional subscriptions.	

#### 7.5 IT requirements

Questions	Responses
Describe your IT services giving detailed information about your compliance with the EDI (EDIFACT/X12) standard and SirsiDynix Symphony, specifically regarding: <ul style="list-style-type: none"> <li>• electronic claiming</li> <li>• electronic invoicing</li> <li>• Supplier subscription number supplied with EDI (EDIFACT/X12) electronic invoice</li> <li>• other services compliant with EDI (EDIFACT/X12) or the SirsiDynix Symphony system</li> <li>• which other standards do you support?</li> </ul>	

### 7.6 Transfer arrangements

Questions	Responses
Describe your procedures for assisting the Library to transfer subscription data from a previous supplier. Describe in detail how you would liaise with the previous supplier.	
Once the Library has provided you with the list of titles (including order number, title, ISSN) describe how your subscription reference numbers can be supplied for loading into the Integrated Library System.	

### 7.8 Service levels in relation to publisher

Questions	Responses
Describe your workflow and provide examples of actions you would take to improve service given by publisher in case of non-supply or online access interruption.	

**Additional information**

Place and date \_\_\_\_\_

Signature of Legal Representative \_\_\_\_\_

**A non-authenticated photocopy of the valid ID document of the signatory is enclosed.**