**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**

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| Lot 2 |
| 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**

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**Ordering and supplying**

**6.1 New orders**

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| **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**

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| **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.  |  |

**6.6 Database management**

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| **Questions**  | **Responses** |
| Describe in detail the complete subscription workflow from managing trial access with publisher/provider to set-up of access activation of databases. Indicate the time taken for each step. |  |
| Describe how you would support the Library with license negotiations with the publisher/provider. |  |
| Describe in detail the different kind of information provided on databases in your Subscription Management System. Include access and license information (e.g. post-cancellation access rights, etc.). |  |

**6.8 Claims and troubleshooting**

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| **Questions** | **Responses** |
| Describe in detail your claiming and troubleshooting 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/provider. |  |
| Describe your Subscription Management System with reference to claiming options and history. |  |

**6.9 Invoicing**

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| **Questions** | **Responses** |
| 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**

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| **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**

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| **Questions** | **Responses** |
| Describe your communication policy in terms of speed and efficiency in general. |  |
| Describe specifically your procedures for dealing with online access problems and price quotations. |  |

**7.3 Bibliographic services and management information**

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| **Questions** | **Responses** |
| Activate temporary access to your Subscription Management System, and provide instructions including URL and Username/Password. |  |
| State the total number of titles and of current titles of your Subscription Management System. |  |
| Describe the features for viewing the Library’s subscription information online, including invoices, claiming history and access and licence information (platform, URL, etc.).  |  |
| 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. |  |
| 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. |  |
| Do you provide database usage statistics reports? Declare if this service is free or if any charges are applied (no price quotations required). |  |

**7.5 IT requirements**

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| **Questions** | **Responses** |
| Describe your IT services giving detailed information about your compliance with the EDI (EDIFACT/X12) standard and SirsiDynix Symphony, specifically regarding:* + electronic claiming
	+ electronic invoicing
	+ Supplier subscription number supplied with EDI (EDIFACT/X12) electronic invoice
	+ other services compliant with EDI (EDIFACT/X12) or the SirsiDynix Symphony system
	+ which other standards do you support?
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**7.6 Transfer arrangements**

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| **Questions** | **Responses** |
| Describe your procedures for assisting the Library to transfer subscription data from a previous supplier or publisher/provider. Describe in detail how you would liaise with the previous supplier or publisher/provider. |  |

**7.8 Service levels in relation to publisher**

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

**Additional information**

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

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

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