OP/EUI/LIB/2015/001

Open Call for Tenders for an Integrated Library System for the European University Institute

TENDER SPECIFICATIONS

Contents

CHAPTER I - GENERAL INFORMATION ON THE TENDER

Introduction and objectives

Preamble

The European University Institute Library (EUI Library) is considering selecting an Integrated Library System (ILS) under the SaaS model (Software as a Service) that can provide support for all traditional library activities and for new library services, such as Electronic resource management and Discovery.

Objectives

The EUI Library provides services to approximately 1100 doctoral and postdoctoral researchers and staff in the field of Social Sciences, with a specific focus on European matters.

Over the years, the EUI Library has created a multilingual collection where traditional formats such as paper and microforms coexist with all types of electronic resources which are supplied by many different vendors.

All the traditional library activities are regularly carried out, such as budget administration, acquisitions, cataloguing, circulation, interlibrary loan, print and electronic journals management, various types of electronic resources management, discovery and other end-user services.

These activities and the services provided to end users are currently managed by separate systems (locally-hosted traditional ILS, OpenURL resolver, Discovery service) provided by different vendors. While this structure has worked well for the EUI Library, the lack of full integration among systems entails some shortfalls, mostly in the area of services to end users, which the EUI Library would like to overcome. Besides, the new ILS models orientated towards services and openness are perceived as a good opportunity to offer services to end users beyond the traditional realm of a library, and the EUI Library would like to explore this. On top of this, the EUI Library would also like to take advantage of the SAAS (Software

as a service) model to free local resources, mostly related to hardware and operating system maintenance, as well as to benefit from more frequent software updates.

The EUI Library is searching therefore for an Integrated Library System that can provide support for all traditional library activities and for new library services, ideally supplied by a single vendor under the SAAS model.

The EUI Library is interested in a solution with the following main functionalities:

1. Cataloguing
2. Circulation
3. Acquisitions
4. Print serials management
5. Electronic resource management
6. OpenURL link resolver
7. Interlibrary loan
8. Reporting and analytics
9. Public Access Catalogue
10. Central index and discovery services (optional)
11. System administration

The above functionalities need to be covered by a maintenance and support service, and their initial implementation supported by a detailed project plan.

For the purposes of system sizing and migration planning the following figures should be taken into consideration:[1]

Bibliographic records	400000 plus 250000 records, corresponding to the collections *Making of the modern world* and *Eighteenth Century Collections Online,* which are not relevant at the level of ILS management, but should be visible in the public interface.

[1] Figures as of October 2015

Bibliographic records created in 2014	13500
Item records	520000
Item records created in 2014	14000
Authority records	370000
Patron records (including non-active records)	20000
Active Loans	50000
Active holds	500
Order records	69000, 3500 of which open
Open paper journal subscriptions	1700
Invoice records	14500
Items loaned or consulted (2014)	110000
Ejournals in OpenURL Link Resolver	50000
Ebooks in OpenURL Link Resolver	470000
Library staff having access to the system	30

Article 1 – Definitions

- "Best value for money" means that the evaluation is done according to the best quality/price ratio.
- "Exclusion criteria" are general criteria related to legal and financial requirements stated in the tender documentation. Exclusion criteria are eliminatory (see Article 5).
- "EUI" means the European University Institute.
- "Library" means the Library of the European University Institute.
- "May" indicates that the specified item is optional. (See also "must" and "should").
- "Must" indicates that the specified item is mandatory.
- "Response time" is the maximum time in which a maintenance or support incident is actively dealt with by the Service Provider.
- "Selection criteria" relates to the acceptance of the minimum requirements by tenderer as stated in Article 6 in this document. Selection criteria are eliminatory.

- "Service Provider", "Contractor" mean the company to which the tender has been awarded, and to which the supply of services is entrusted.
- "Should" indicates that the specified item is desirable. (See also "must" and "may"). Desirable items include some service features, some standards above the mandatory level, etc.

Article 2 – Duration of the contract

The contract has a duration of twelve (12) months, automatically renewable up to six (6) times. All the clauses related to duration and termination are included in the Draft Contract (Article I.2), wich is part of the tender.

Article 3 – Estimated value of the contract

The overall estimated value of the contract is Euro 520,000.00 (five hundred and twenty thousand/00) excluding VAT for the entire possible duration of the contract (84 months). This estimate includes implementation costs, as well as annual subscription fees (such as maintenance and support) and on-site training and has been estimated on the basis of three years of historical records of expenditure and on a market survey on implementation costs.

This estimate is to be considered purely indicative; it shall be used merely to determine the overall value of the tender and it does in no way commit the EUI to award a tender for the entire above-mentioned sum.

Article 4 – Exclusion criteria

Exclusion criteria are eliminatory.

- Tenderers must certify that they are not in one of the situations listed below, by completing and signing the form in Annex C - "Declaration on honour".

- Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:
    a. are subject to a conflict of interest;
    b. are guilty of misrepresentation in supplying the information required by the EUI as a condition of participation in the tender procedure or fail to supply this information.

The awarded tenderer must produce evidence of compliance with the conditions stated in Annex C "Declaration of honour" according to what established in Annex IV of the President Decision 44/2014 before the signature of the Contract.

Article 5 – Selection criteria

Tenderers must provide evidence of economic, financial, technical and professional capacity.

Tenderers who do not provide the documentation specified, or who are judged, on the basis of the documentation provided, not to have fulfilled the criteria specified below, will be excluded.

- Economic and financial capacity:

Tenderers must provide evidence of the economic and financial capacity by presenting the financial statements or extracts from balance sheets for at least the last two financial years for which accounts have been closed, where publication of the balance sheet is required under the company law of the country in which the economic operator is established (to be inserted in Envelope 1, Administrative documents).

- Technical and professional capacities:

Tenderers must comply with the requirements as described in the Tender Specifications, Chapter II Technical Specifications. All requirements indicated with "must" are mandatory: non-compliance will be considered grounds for exclusion.

Article 6 – Evaluation procedure

Evaluation procedure

Proposals will be first assessed according to the Exclusion criteria. Proposals which do not meet the Selection criteria will also be eliminated. It is important that all required information be supplied and attention be paid to the required procedures.

The tender will be evaluated according to the requirements as described in "TITLE II Technical Specifications" and "TITLE III Economic Specifications".

The tender will be awarded according to the principle of "Best value for money", based on the evaluation carried out by the EUI Selection Committe.

Article 7 – Award criteria

Total score = 100

Technical proposal score = 70 (as specified in the table *Details of the Award Criteria*, below)

Economic proposal score = 30 (as specified in the table below)

Decimal fractions are allowed in scores: e.g. 15.5

The Economic proposal will be awarded according to the following formula:

$$\text{Score} = 30 \times \frac{\textit{Minimum total price offered among all tenderers}}{\textit{Total price offered by the tenderer}}$$

Please note that the Central index and discovery service (Chapter II, 15) is an optional service. The EUI reserves the right not to award the service to any supplier: in this case only 85 of 100 points will be assigned.

	Details of the award criteria			Max Score
Technical offer	GENERAL TECHNICAL REQUIREMENTS			16.5
		System requirements	2.5	
		Interoperability	2.5	
		Data migration	3.5	
		Implementation project	3.5	
		Customer services	2	
		General - Administration	2.5	
	MAIN FUNCTIONS			33.5
		Cataloguing	6	
		Circulation	6	
		Acquisitions	5.5	
		Serials	5.5	
		ERM	6	
		ILL	4.5	
	REPORTING AND ANALYTICS			2.5
	PUBLIC ACCESS CATALOGUE			7
	OPTIONAL: CENTRAL INDEX AND DISCOVERY SERVICE (it will not necessarily be assigned):			10.5
	TOTAL TECHNICAL OFFER		**70**	
Economic offer	TOTAL COST FOR SEVEN YEARS			25.5
	OPTIONAL: CENTRAL INDEX AND DISCOVERY SERVICE (it will not necessarily be assigned):			4.5
	TOTAL ECONOMIC OFFER		**30**	
	GRAND TOTAL (Technical + Economic)			**100**

Article 8 – Payment arrangements

Payments will be made according to the arrangements specified in the Draft Contact (Article I.4).

Article 9 – Penalties

Except for cases in which the law specifies otherwise, the EUI shall uphold compliance with the clauses agreed in these Tender Specifications by reserving the right to apply the following penalties, over and above reimbursement for any expenses incurred in ensuring that its activity could continue effectively and regularly:

- Delayed delivery of any deliverable based on signed project plan for causes attributable to the Contractor, the Contractor shall be charged a penalty of Euro 500.00 (five hundred/00) a day for each working day of delay for more than 2 (two) working weeks.
- For each instance of non-compliance with the data conversion or migration specifications agreed between the Contractor and the Contracting Authority the Contractor will be charged a penalty of Euro 1000.00 (one thousand/00) unless the problem is solved within 30 days from notification.
- For each record not migrated during the migration process for causes attributable to the Contractor, the Contractor will be charged a penalty of Euro 1.00 (one/00) per record unless the problem is solved within 30 days from notification.
- For non-compliance with Service uptime requirement, as specified in Chapter II, 1.2.1, the Contractor will be charged a penalty of Euro 100.00 (one hundred/00).
- For non-compliance with agreed support/maintenance time schedules the Contractor will be charged penalties according to the following scale:
    - For Level 1 maintenance and support incidents (see "Chapter II, 1.2"), a penalty of Euro 100.00 (one hundred/00) for every hour of delay.
    - For Level 2 maintenance and support incidents (see "Chapter II, 1.2"), a penalty of Euro 100.00 (one hundred/00) for every two hours of delay.

  - For Level 3 maintenance and support incidents (see "Chapter II, 1.2"), a penalty of Euro 100.00 (one hundred/00) for every eight hours of delay.
  - For Level 4 maintenance and support incidents (see "Chapter II, 1.2"), a penalty of Euro 100.00 (one hundred/00) for every day of delay.
  - For Level 5 maintenance and support incidents (see "Chapter II, 1.2"), a penalty of Euro 100.00 (one hundred/00) for every two days of delay.

- For each instance of non-compliance with non-mandatory technical requirements included in the Contract Euro 1000.00 (one thousand/00) unless the problem is solved within 30 days from notification.

The above-mentioned penalties shall be issued under the form of debit notes and deducted directly from the agreed payment.

The application and/or payment of penalties in no way exonerates the Service Provider from fully complying with the obligation it has breached.

Article 10 – Obligations after being awarded the tender

In order for the definitive award of the tender to enter into force, the successful Company must:

- Issue a performance bond equal to 10% of the mean annual contract value based on its own economic Offer. The performance bond shall be issued as a guarantee of the Company fully performing all obligations relating to the contract, and deriving from it, and shall be raised according to the method described in Article I.4.2 of the Draft Contract (Annex H);
- Produce evidence of compliance with the conditions stated in Annex C “Declaration of honour” (see Chapter I, Article 5).

CHAPTER II – TECHNICAL SPECIFICATIONS

The Technical Proposal must be specified using the form in Annex D.

Introduction: EUI Library technological infrastructure

The proposed system should be able to work within the environment of the technological hardware and software infrastructure of the EUI Library. The elements that make up this infrastructure are the following:

Authentication methods available

The following authentication methods are available at the EUI. They are listed in order of preference:

- Windows Azure Active Directory
- SAML / Shibboleth on Azure
- Radius

Network connection

- WAN: 1Gbps dedicate Fiber Optic Cable connection to GARR, the Italian Research & Education Network.
- LAN: The EUI wired network infrastructure supports 10BaseT, 100BaseT or 1000Base/T compliant network card (NIC). All devices are phisically connected by Cat6 UTP compliant network cable with standard RJ45 connector.
- WLAN: The EUI wireless network infrastructure supports 802.11g and n standards.

Hardware

<u>PCs</u>

LeNovo ThinkCentre M90	
(Windows platform)	
CPU	Intel Core i3 550
Clock frequency (GHz)	3.3
Memory	
RAM (GB)	4
Hard Drive	
- quantity	1x
- capacity (GB)	300
- speed (rpm)	7200
DVD-RW Drive	Samsung TS-H653J
- speed	48x24x48x

I/O Ports	
Parallel Port	n/a
PS/2 port	n/a
Serial port	1x
USB	8x (2x front)
- type	2
Graphics	NVidia GeForce 320M
- resolution	Full HD 1080i (1920x1080)
- colour depth	32bit (16.7M)
- RAM	512MB
Audio	Integrated NVIDIA HD Audio
Speakers	Built-in
Microphone-IN	2x (1x front)
Headset-OUT	2x (1x front)
Speakers-OUT	1x
Network	Intel 82578DM Gigabit Wake-On-LAN
Case	Small Form Factor Desktop
Mouse	Optical 2x Button USB Wheel Mouse
Keyboard	105 Keys USB Keyboard
- layout	US International

RFID devices

- RFID selfcheck machines: 3M Selfcheck R-Series 8420
- RFID pads: 3M RFID Reader Pad Model P12 and 3M Mini RFID Pad Model 210
- RFID inventory reader: 3M Digital Library Assistant (Model 804)
- Security gate: 3M RFID Detection System Model 9109

Barcode readers

- Bancolini tecno BT C80B HS programmable internal card

Label printers

- Zebra TLP -2844

Software

General EUI installation

Software	**Version**
Windows 7 Professional	SP1
7-Zip	9.2
Adobe Flash Player	11.9.900.170
Adobe Reader (including AIR)	11.0.00
Adobe ShockWave Player	11.6.0.626
Adobe SVG Viewer	3
CD Burner XP	4.5.2.4478
FileZilla	3.7.3
Internet Explorer	11
Image Resizer	2.1
Java Runtime Environment	7.0.670
Google Chrome	37.0.2062.120
Microsoft Office :	2010
Access	
Excel	
PowerPoint	
Word	
Microsoft Office Proofing Tools :	
English	
German	
French	
Italian	
Spanish	
Microsoft Silverlight	5.1.20513.0
NotePad++	5.9.6.2
Oracle Data Provider	11.2.010
PDF Creator	1.7.2
PuTTY	0.6
Symantec Endpoint Protection	12.1.3001.165
SyncToy	2.1.0
TrueCrypt	7a
Windows Media Player	12

Library installation

- MarcEdit version 6

Reference managers

- Endnote version X7.4 Update
- Zotero version 4.0

Institutional repository

DSpace 5.2 XMLUI Institutional Repository platform working with the following interoperability list of metadata formats:

- oai_dc
- rdf
- ore
- mets
- didl
- xoai

Integrated Library System

Millennium Release 2011 1.6_5, with the following main modules and features in use:

- Cataloguing with authorities (MARC 21)
- Circulation
- Reserves
- Acquisitions
- Print Serials
- Electronic Resources
- Interlibrary Loan
- WebPac (OPAC)
- AirPac (mobile version of WebPac)
- Item Status API (to interface with 3M RFID infrastructure for deactivation and activation of AFI security during checkout and return operations)
- Patron API (to provide authentication for resources proxied via our EZProxy)
- Enrichment content provided by Content Cafe service
- Test server replicating the above functionality

OpenURL Link Resolver

- Ex Libris SFX version 4

Discovery Interface

- Ex Libris Primo July 2015 Release

Proxy

- EZProxy

1. System requirements

Mandatory requirements

1.1 The system must be provided as a hosted solution. Describe the specific infrastructure, resources and services that would be allocated for the EUI, and what is your strategy to keep them updated to guarantee an adequate performance. Besides, provide details about the hosting service in general, including hosting facilities, uptime, performance, disaster recovery, redundancy, backups and data protection

1.2 The system must have a Software Licence Agreement (SLA) covering, at least, parameters regarding system uptime and maintenance and support service response times, with the following minimum requirements:

1.2.1 System uptime must be at least 99.7% measured over a period of two months, excluding announced maintenance downtime.

1.2.2 For maintenance and support incidents in which the system or the public access catalogue are not available the response time must be within 1 hour (Level 1).

1.2.3 For maintenance and support incidents in which a full module or a critical function are not available and no workaround is possible the response time must be within 2 hours (Level 2).

1.2.4 For maintenance and support incidents in which a full module or a critical function are not available but there is an acceptable workaround the response time must be within 8 working hours (Level 3).

1.2.5 For maintenance and support incidents in which the system, a module or a function do not work as expected but without affecting normal business processes the response time must be within 1 working day (Level 4).

1.2.6 For any other maintenance and support incidents the response time must be within 2 working days (Level 5).

Provide details on your SLA.

1.3 All the EUI patron data must be exclusively stored in the European Union. Provide details about this and about any provisions and measures taken to protect personal data in all transactions of the system, especially when interfacing with third party systems.

1.4 All the configuration and data created or loaded in the system by the EUI remain property of the EUI. Therefore, the system must provide a mechanism to extract those configurations and data in a meaningful and exchangeable format. Ideally, the system should provide tools that allow the EUI to do this independently. In the absence of those tools, the service provider must extract all EUI data and configurations and transfer them to the EUI at least at the end of the contract or upon its termination. Provide details about those tools and the available export formats, with special emphasis on MARC data.

1.5 The system must receive the appropriate updates to add new functionality as needed by the Library sector and to resolve software issues that might be found. Describe your software development process, including methodologies used, frequency and types of updates, how new features are decided and how libraries can influence this process. Provide a timeline of future enhancements.

1.6 A test system must be provided, containing the EUI configurations and data from the production system. The service provider must either provide the EUI with the tools to refresh the test system with the data and configuration of the production system or perform the refresh itself at least once a year. Provide details about this.

Other characteristics

1.7 All the EUI configuration and data should be stored in the European Union. Provide details about this and about any other components of the system that do or do not comply with this.

1.8 The system should be accessible via a single client, preferably web-based, without any network restrictions. Provide details about your clients (including recommended specifications) and, in the case of more than one type, which parts of the system are accessible with each type, as well as details about any provisions or measures implemented to keep systems transactions under a secure environment.

1.9 Describe any additional features or functionality

1.10 Supply the names and addresses of three university/academic/research libraries among your customers in Europe that may be contacted.

1.11 Provide details of: any written policy on quality that the company has; any external assessment or certification of quality received and your approach to assuring quality in fulfilling this Contract.

2. Interoperability

Mandatory requirements

2.1 The system must provide Application Program Interfaces (APIs) and/or other interfaces that allow extending the system beyond its standard functionality and integrating it with other environments. Specify which specific APIs are available, which ones are offered as part of the proposal for the EUI, what the entry conditions are for those not offered (indicate in your economic proposal details about pricing if applicable) and whether there are any limitations in the usage of the APIs.

Other characteristics

2.2 From the list of the hardware devices in use at the EUI Library (see "EUI Library technological infrastructure"), specify which ones are supported and covered as part of the proposal for the EUI, which ones are supported and not covered, and which ones are not supported.

2.3 Provide a list of relevant library-environment software programmes the system is compatible with and describe what type of added functionality this compatibility provides.

2.4 Describe any additional features or functionality

3. Data Migration

Mandatory requirements

3.1 The service provider must convert and migrate the following data sets from the current EUI Integrated Library System and OpenURL Link Resolver (see "EUI Library Technological Infrastructure"):

- Bibliographic records
- Item records
- Authority records
- Patron records
- Active loans
- Active holds
- Open purchase orders
- Electronic collection (ejournals and ebooks) holdings (from OpenURL link resolver)

3.2 All data must be encoded using the Unicode standard.

3.3 For identification purposes, the EUI Library uses numbers (commonly called “barcode numbers”) for item and patron records. These identification numbers have the following structure:

- Items: 14 digit number, starting with 3, plus 12 running digits, plus a final check digit. Example: 30001006248449
- Patrons: 14 digit number, starting with 2, plus 12 running digits, plus a final check digit. Example: 20001000516660

These identification numbers must be preserved in the new system and used as the main identifiers in all components, especially in circulation.

3.4 The service provider must supply, at the start of the implementation project, a form or set of forms in which the EUI can indicate the conversion and migration specifications for its own data and configuration. Describe these forms and other documentation used for the migration and conversion of data and configuration.

Other characteristics

3.5 The service provider should convert and migrate the following data sets from the current EUI Integrated Library System and OpenURL Link Resolver (see “EUI Library Technological Infrastructure”):

- Unpaid fines
- Closed purchase orders
- Serial subscriptions and holdings
- Invoices

Indicate if other types of records or data can be migrated from any of the mentioned systems.

3.6 Record identification numbers from the current system should be migrated to the new system. Indicate for which records this is possible, whether these identification numbers could be indexed in the new system and where in the new system these identification numbers would be stored (note field, specific-purpose field, etc.).

3.7 The implementation project plan for the EUI Library should include at least two full data loads, including the live data load.

3.8 The implementation project plan for the EUI Library should include a meeting to discuss the process of data conversion and migration from the current systems to the new system.

3.9 Describe the process followed for the live data load, including aspects such as expected downtime for the EUI Library (time in which neither our current system, nor the

new one will be fully available) based on the types and amounts of records to be loaded, tasks assigned to Library staff during the process or suggested practices during that period of time.

3.10 Provide details about previous experience with migrating from Millennium and SFX systems, indicating which types of data have been successfully migrated from those systems to the system proposed.

3.11 Describe any additional features or functionality

4. Implementation Project

Mandatory requirements

4.1 The implementation of the system must be finished by November 16, 2016, and should be supported by a detailed implementation project plan. Explain how the system would be implemented at the EUI and provide the project plan proposed for the EUI implementation.

4.2 On-site training must be provided for all functionality requested by the EUI and offered as part of the proposal for the EUI. Provide the training plan proposed for the EUI implementation and describe your general offer regarding training services.

4.3 Data from the EUI Library current Library Management and OpenURL Link Resolver systems must be converted and migrated to the new system following the specifications in section “3. Data Migration”.

4.4 The service provider must assign a person, acting as project manager, who will be the main reference point throughout the whole project. Indicate which staff would be assigned for the EUI implementation project, including their role, qualifications, experience and other relevant details.

Other characteristics

4.5 The system should be in production by one of the following three dates, provided that the contract is signed before March 1, 2016 (in brackets are the points assigned to each production date proposed):

- July 27, 2016 (2,5 points)
- September 28, 2016 (1 point)
- November 16, 2016 (0 points)

Indicate the proposed production date in the proposed project plan.

4.6 Describe any additional features or functionality

5. Customer Services

Mandatory requirements

5.1 A maintenance and support service must be included with the annual subscription to the system. Describe this service, including all possible steps a support request can go through, from the time the Library sends the request until the request is resolved.

5.2 The maintenance and support service must be available at least from 09:00 – 18:00 CET/CEST Monday to Friday, or ideally as a 24/7 service. In the case of Level 1 or Level 2 maintenance and support incidents (see Chapter II, 1.2) the service must be available 24 hours a day, 7 days a week. Provide details.

5.3 The maintenance and support service must be accessible, at least, via a self-service platform or telephone. Describe these methods and any other methods available.

Other characteristics

5.4 All services offered to the EUI should be based in the European Union. Describe your structure as a company, indicate which services (support, training, data, sales, etc.) are available in each of your offices and specify which services would be offered to the EUI and from which office or offices.

5.5 Describe which participatory platforms (wikis, forums, user groups, email lists) are available for customers to share experiences, solutions and custom developments.

5.6 Describe any additional features or functionality

6. General & Administration

Mandatory requirements

6.1 The system must be based on international standards. Specify which ones are currently supported or are planned to be implemented (in such case, provide an estimated time of delivery to clients). Describe your strategy to keep up with new standards.

6.2 The system must provide a function for editing records in batch. Specify which types of records can be modified in batch and to which extent.

6.3 All functions must be properly documented. Indicate which manuals, help files, guides, etc., are available with the system.

6.4 All data in the system must be encoded using the Unicode standard. This applies to data originally created in the system or imported from any other source, regardless of the original encoding of the incoming data.

6.5 The system must provide the Library with functionality to configure and administer the parameters and policies that govern the functioning of all its components. Describe this functionality, indicating which parameters and policies are available and what their purpose is.

6.6 Library staff accessing the system must be provided with the sufficient authorisations to perform their work, based on a predefined role or a group of individual functions. Describe how authorisations are assigned by the system and how the Library can manage these authorisations.

Other characteristics

6.7 Modules, functions, configurations and data should be fully integrated, so that data created in one module or with one function can be used with another module or function. Indicate in which cases this is not possible.

6.8 The system should allow for automating as many tasks as possible, by means of macros, templates, etc. Describe the capabilities of the system in this aspect

6.9 Fixed-length fields, such as dates, predefined value fields or fields for codes should be available for all record types and definable by the EUI. Indicate for which record types fixed-length fields are available and what their purpose is (reporting, selection, etc.)

6.10 Variable-length fields, such as notes or messages, should be available for all record types and definable by the EUI. Indicate for which record types variable-length fields are available and what their purpose is (reporting, selection, etc.)

6.11 The system should keep track of the history of events of each record. Describe for which records this is possible, which events are traced, how this history can be accessed, which time range of this history can be accessed (if it is not possible to view the full history of events, explain why) and whether it can be used for reporting purposes.

6.12 The system should keep track of changes made on each record and manage different versions of it. Indicate for which types of records this is possible and whether a record can be reverted to a version prior to the latest one.

6.13 The system should have no limits in the number of records, configuration values, saved lists, saved reports, templates, etc., that can be stored. Indicate if there are any limits in your system either in general or for the specific proposal for the EUI.

6.14 A dashboard configurable per login should be available, containing tasks lists, reminders, announcements, and other widgets.

6.15 The system should provide optimised workflows, supported by tasks lists, task and record assignments or alerts. Describe how these workflows are managed.

6.16 It should be possible to upload and attach files of any format to any type of record of the system. Specify which records allow files attached, which of these files can be visible to the public and what the limitations for attaching files are.

6.17 Describe any additional features or functionality

7. Cataloguing

Mandatory requirements

7.1 The system must provide full support for AACR2, RDA and MARC21 (for bibliographic, authority and holding records) format. Provide details about this and about other metadata formats supported.

7.2 The system must provide a metadata editor with advanced capabilities and features for working with text within the context and structure (fields, subfields, indicators, fixed- and variable-length fields, etc.) of MARC21 records. Describe these capabilities and features.

7.3 The system must allow original cataloguing and derived cataloguing via Z39.50. Describe both processes and in the case of derived cataloguing indicate at least which types of metadata sources can be used, how they need to be set up, whether more than one source can be searched concurrently and whether OAI-compliant repositories can be set up as cataloguing sources (with special attention to DSpace systems).

7.4 The system must provide validation and control of bibliographic headings against a local and other system-provided authority files. Describe the authority control features of the system.

7.5 The system must allow importing bibliographic records in different formats and with different encodings. The importing process must include the possibility of specifying the matching points between existing and incoming records and of setting up rules that are triggered when matches are found. It must also be possible to set up rules to manipulate incoming records prior to integrating them in the local catalogue. Describe the above and any other additional related functionality.

7.6 The system must allow describing physical items by means of holdings records, item-specific records or both. Describe how holdings and item records are used in the system, which item level data elements (barcode, item type, location, shelfmark, etc.) are available, what the purpose of each of those fields is (descriptive, locating the item, statistical, etc.) and how items are used in other components of the system.

7.7 The system must provide adequate support for classification and shelfmark notations in Dewey Decimal Classification v.23 and in alphanumeric systems, for the purpose of keyword searching and result sorting, browse searching (in the appropriate order), record list sorting, and reporting. Describe how this is supported and provide details about other classification schemes supported.

Other characteristics

7.8 Describe your plans to implement emerging cataloguing- and metadata-related standards or initiatives, especially BIBFRAME and Linked Data, with an estimated timeframe for development and implementation.

7.9 The system should provide tools to keep a strict control over the quality of the cataloguing data, including, but not limited to, features such as: duplicate record and field checking, MARC21 format integrity validation, online access to cataloguing standards and policies directly from the metadata editor, data-dependency checking (for instance, if a given value exists somewhere in the MARC record, another value must also be present), spell-checking, controlled vocabularies for fields and subfields with predefined values, such as 336, 337 and 338. Describe these and any other tools available.

7.10 The system should provide access to a shared catalogue of bibliographic records. Describe, at least, how cataloguing is done using that shared catalogued, which type of data is accessible, who contributes to that collection, what the minimum quality requirements are and what the rules about withdrawing records and ownership are.

7.11 The system should provide access to, at least, the authority record file from the Library of Congress, together with the EUI local authority file. Indicate if other authority files are available, and explain how all these files are blended for a single entry point for authority control.

7.12 The system should provide a Z39.50 server to allow other libraries to capture bibliographic records from the EUI Library catalogue. Describe in detail its functionalities and, if any, its limitations.

7.13 The system should allow importing authority and holdings records in different formats and with different encodings. The importing process should include the possibility of specifying the matching points between existing and incoming records and of setting up rules that are triggered when matches are found. It should also be possible to set up rules to manipulate incoming records prior to integrating them in the local catalogue. Describe the above and any other additional related functionality.

7.14 As a contributor to OCLC WorldCat, the EUI would like to make sure that its records are updated in WorldCat in a timely manner, either when they are newly created, modified or deleted. Describe which specific functionalities are available in your system and how they would help the EUI to maintain the correct holdings information in WorldCat.

7.15 The EUI Library uses home-grown classification schemes for its LAW and EDC (European Documentation Centre) collections and uses some custom add-ons for some part of its Dewey-based collections. Rules for all three cases can be found in “Appendix: Classification and shelving schemes at the EUI Library”. The system should provide adequate support for classification and shelfmark notations in all these cases, for the purpose of

keyword searching and result sorting, browse searching (in the appropriate order), record list sorting, and reporting, both for staff and user end. Indicate which of their requirements can be implemented in the system and what the timeframe for such implementation would be.

7.16 The system should provide functionality to allow the EUI to determine how fields in bibliographic, authority and holding records are indexed and, therefore, searched. Explain the scope of custom indexing in the system.

7.17 The system should provide a tool or function for checking the correct status of resources accessible via URLs contained in the appropriate fields in MARC bibliographic and holdings records. Describe this functionality.

7.18 The system should provide functionality to print labels with the label printers in use by the EUI (see "EUI Library technological infrastructure"). The labels should contain data from, at least, item records, and in any case at least the shelfmark of the item. Describe this functionality and indicate the compatibility of the system with the label printers in use by the EUI and if any special software is needed to ensure this compatibility.

7.19 Describe any additional features or functionality

8. Circulation

Mandatory requirements

8.1 The system must provide a patron database that can be populated with manually created records or with records imported from external databases, using the appropriate system-provided tools to build up the system's patron database, at least as a batch scheduled process, preferably as a record-by-record real-time process, or ideally as both. Explain how the patron database is managed in the system and what the overall functionality of those importing tools is, indicating which data formats they accept, with examples.

8.2 The system must provide enough granularity in the configuration of circulation policies and parameters to allow for as many possible scenarios in managing loans, holds and fines, bearing in mind factors such as patron types, item types, locations, item availability, etc. Describe how the system manages this.

8.3 The system must provide a calendar, maintained by the Library, to specify the days of the week or the specific dates of the year in which the Library is closed. This calendar must be automatically taken into account during circulation activity, so that loans cannot be due, fines cannot accrue or holds cannot expire on a closed date, for instance. Describe how this calendar can be configured and how it affects circulation or any other system transactions.

8.4 The system must allow the EUI to communicate with its patrons as a result of the activities managed as part of their relation with the system (loans, holds, fines, etc.).

Describe which communication methods are available (print, email, SMS, other, etc.), how they are triggered (interactively: a member of staff initiating the communication from within the system; scheduled: the system sending messages in batch as part of a Library scheduled process; event-based: the system sending individual messages as a result of an event occurred in the system such as hold made available), and how the EUI could customise, schedule and keep track of the messages sent.

8.5 The system must interface, via the SIP2 or NCIP protocols, with any selfcheck machines (see "EUI Library Technological Infrastructure") or any other compatible hardware or software available in the EUI, currently or in the future. Describe which services are available in your system through the SIP2 or NCIP protocols.

Other characteristics

8.6 The circulation functions of the system should be tightly integrated with the EUI Library RFID infrastructure (RFID reader pads: see "EUI Library Technological Infrastructure") to manage security activation and deactivation of the RFID tag security during item checkout and checkin, and loan renewal operations from the standard system client. Explain how this integration works, which other functions are also integrated and which specific hardware is currently, or is planned to be, supported.

8.7 The system should manage reserves of materials for specific courses and professors, both for physical items and electronic resources, allowing defining independent circulation conditions. Describe the functionality of this feature.

8.8 The system should provide special management of remote storage sites and locations, where access to the collection is limited to Library staff only. Describe how this is implemented in your system and how the process of requesting material from a remote storage site works.

8.9 The system should provide special functions for the management of holds, including holds on ready available materials, reporting of available holds expired on the hold shelf and reporting of highly requested titles based on number of active holds on them. Explain these and other relevant functions.

8.10 Explain the types of patron blocks available in the system as a result of circulation activity, how they can affect patron access to other areas of the system (especially access to electronic resources) and how the EUI could override these blocks permanently (by means of configuration) or on a case by case basis (by means of override passwords or modifying specific system records).

8.11 The system should keep track of the circulation activity history of each patron (loans, holds, fines) as well as the history of the patron record (changes of status or of user type, for instance), for consultation or statistical purposes. In addition to this, it should provide the appropriate tools that allow the EUI to anonymise this data, yet leaving it usable for

statistical purposes. Describe how this works in the system and provide information about time-limits to the archiving of such data.

8.12 It should be possible to pay patron fines and to have their accounts automatically updated using an online payment gateway interfacing with system. Describe how this is achieved and with which gateways it is already possible.

8.13 The system should provide functions to keep track of the internal usage of the EUI Library open shelf collection, as well as to manage inventories. Describe these functions.

8.14 The system should provide a standalone client with minimal circulation functionality for situations in which the system is not accessible online. Describe which functions are covered with this client and how it interacts with the system to update the database when the system is back up online.

8.15 Describe any additional features or functionality

9. Acquisitions

Mandatory requirements

9.1 The system must provide functionality to manage the complete acquisitions process of both print and electronic materials, covering at least firm, standing and subscription orders. Describe how acquisitions processes are managed in the system.

9.2 The system must support different currencies for the processing of purchase orders, invoices and payments. Exchange rates in the system must be customisable by the Library or, alternatively, automatically set to comply with the provisions stated in the InforEuro website:
http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm

9.3 The system must comply with EDI standards (Edifact, X12) for the purpose of communicating with vendors, supporting at least purchase order and invoice message types. Describe the EDI functionality available in your system, which types of messages (apart from those already mentioned) and features are supported and with which vendors the system is currently ready to communicate.

9.4 The system must support, at least, the exchange of invoice and payment data with external financial systems, especially with SAP, including external fund information. Describe which specific functionality is provided for achieving this and indicate with which systems the interface is successfully in operation and what other types of data (e.g., orders) can be exchanged.

9.5 The system must provide functionality to manage Library budgets and funds. Describe this functionality.

9.6 The system must provide functionality to manage Library vendors. Describe this functionality.

9.7 The systems must provide functionality to manage Library invoices. Describe this functionality.

Other characteristics

9.8 Does the system provide any special acquisition features for any specific vendor? If so, describe them, especially for the current EUI main print book suppliers: YBP, Harrassowitz, Amalivre, Casalini Libri, Erasmus.

9.9 The system should allow importing bibliographic records with embedded order information. Describe which order data can be imported, with which vendors the system currently works and how the Library can control the behaviour of the import of this data.

9.10 The system should include, within the order record, information about the requestor (an end user who requests that an item to be purchased) and the selector (a member of staff who assesses the request) of the order. This information should be linked to the circulation and public access catalogue modules, so that end users could keep track of their purchase order requests and get materials reserved when received by the Library. Describe this functionality.

9.11 The EUI is currently exploring implementing new models of acquisitions, such as Patron Driven Acquisitions. Describe which Patron Driven Acquisitions workflows and functionality are included in the system, including workflows for electronic resources.

9.12 The system should allow automatic and manual claiming and cancellation of orders. Describe the functionality related to claiming and cancellation, with special attention to which conditions trigger automatic claiming and cancellation and how the Library can determine them.

9.13 The system should provide functionality to manage the closure of a fiscal year and the rollover to a new one. Describe this functionality, indicating if there is a limit to the archived data from previous years.

9.14 The system should provide different methods to communicate with vendors. Explain these methods, indicating to which specific processes they can be applied and how the Library can keep track and receive confirmation of any communication being sent and received.

9.15 Provide details about taxes, discounts and multi-funding in the acquisitions process, describing how they are reflected in order, fund, vendor and invoice records and how the Library can manage them.

9.16 The system should provide performance information about vendors and funds, in a format suitable for comparing the performance of a vendor or fund against another vendor or fund, or the performance of a vendor or fund over several fiscal cycles. Provide details.

9.17 The system should provide specific functionality for importing and managing invoices for subscriptions to print and electronic journals, especially regarding subscription periods. Describe this functionality, indicating which specific vendors it currently works with.

9.18 Describe any additional features or functionality

10. Print Serials

Mandatory requirements

10.1 The system must manage all possible serial publication models, from very regular to extremely irregular ones, allowing for any possible exceptions. Describe how publication patterns and cycles are managed.

10.2 The system must create prediction, claim and cancellation records for specific serial issues according to the publication patterns and cycles established for the serial title. Describe how the system manages this procedure and how these three types of records relate to each other.

10.3 The system must comply with EDI standards (Edifact, X12) for the purpose of communicating with vendors, supporting at least purchase order and invoice message types. Describe the EDI functionality available in your system, which types of messages (apart from those already mentioned) and features are supported specifically for serials and with which vendors the system is currently ready to communicate.

10.4 The system must manage the process of binding loose print serial issues. Describe this process, including how specific issues are identified for binding, how binding specifications are registered, how binding is tracked with vendors and how holdings are updated for internal control and public display purposes.

Other characteristics

10.5 The system should store all serial publication data (patterns, enumerations, chronologies, etc.) using MARC holdings records. Describe to which extent MARC holdings records are supported and how they are created, updated and exported.

10.6 The system should support public display of print serial holding statements using the Z39.71 standard. Indicate to which extent this standard is implemented in the system and describe other public display options of print serial holdings are supported.

10.7 Does the system provide any special acquisition features for any specific vendor? If so, describe them, especially for our main print serial suppliers: Harrassowitz and Ebsco

10.8 The system should provide functionality to print labels with the label printers in use by the EUI (see "EUI Library Technological Infrastructure"). The labels should contain data from records describing serial issues, and in any case at least issue shelfmark, volume, number and chronology. Describe this functionality and indicate the compatibility of the system with the label printers in use by the EUI and if any special software is needed to ensure this compatibility.

10.9 Describe any additional features or functionality

11. Electronic Resource Management

Mandatory requirements

11.1 The system must provide functionality to manage all stages of the lifecycle of an electronic resource: selection, trial, acquisition, licencing, activation, maintenance, evaluation, renewal, cancellation. Describe how electronic resource processes are managed in the system.

11.2 All the records involved in the management of electronic resources (including order, collection/database, licence, title) must be linked and refer to each other. Describe the relations between these records and any other types involved in the management of electronic resources.

11.3 The system must provide a knowledge base with e-journal and e-book packages, titles and services, maintained by the service provider, where EUI holdings can be identified and activated for creating the Library's collection of electronic resources. Describe how activation of holdings works, how this is reflected in the public access catalogue and how the actual data in the knowledge base is maintained (how often it is updated, from which sources data comes from, whether the Library can override knowledge base data with its own local data, etc.).

11.4 In addition to the knowledge base and complementing it, the system must allow the Library to create local records using the same data structure as the knowledge base itself. Ideally, these local records could be transmitted to the service provider for long-term inclusion in the knowledge base, transferring the responsibility of maintenance from the Library to the service provider. Describe this functionality.

11.5 The system must provide an OpenURL link resolver as part of its functionality, which will be used both in the system's public access catalogue and in other databases or catalogues used by the EUI. The link resolver must use the data contained in the knowledge base to build the appropriate links to the correct resources requested by end users. Describe the features of the link resolver, and indicate how the Library can customise the rules for generating links and for creating the corresponding menus in the public access catalogue and in other databases or catalogues.

11.6 The system must proxy links to electronic resources using the proxy service in use by the EUI (see “EUI Library Technological Infrastructure”) . Indicate the level at which this can be applied or excluded (collection or individual title), and if more than one proxy service can be used. If the system provides its own proxy, provide details and describe how it is managed.

Other characteristics

11.7 The system should use bibliographic records for describing databases/collections and e-journal and e-book titles activated by the Library in the knowledge base. Describe how these records can be maintained in the system.

11.8 The system should provide a database with records of vendors and standard licences of electronic resources that can be used by the Library, as an AS IS model or as a model for creating its own local records. Describe this feature.

11.9 It should be possible to attach a file containing a licence agreement to its corresponding record in the system. Describe how this is done and indicate if there any limitations.

11.10 Licence terms should be available for public display. Indicate which specific licence data can be available in the public access catalogue and how the Library can decide about this.

11.11 The system should have the possibility of publishing, via the public access catalogue, searchable and browsable e-book and e-journal “A to Z” lists of the electronic resources activated by the Library in the knowledge base, arranged at least by title and by collection/database.

11.12 The system should support relevant standards related to electronic resource management, such as DLF ERMI, ONIX-PL, COUNTER, SUSHI. Describe which of these or other relevant standards are supported by the system and which specific functionality has been built around them.

11.13 The system should allow exporting electronic resource data in different formats, including a format suitable for updating the holdings of the Library in Google Scholar. Describe the relevant features related to this, including formats available and how the Library can determine which data is exported and when.

11.14 The system should allow importing electronic resource data in different formats in order to update the Library holdings data in the knowledge base of the system. Describe the relevant features related to this, including formats available and how the Library can determine which data is imported and when.

11.15 Describe any additional features or functionality

12. Interlibrary Loan (ILL)

Mandatory requirements

12.1 The system must provide functionality to manage all the processes and statuses (at least, new, pending, claimed, cancelled, received and fulfilled) related to ILL, with the Library acting both as a lender and as a borrower, for any type of material. Describe how ILL processes and statuses are managed in the system.

12.2 All ILL functionality must be fully integrated with the rest of the components of the system, especially with circulation (including its configuration), acquisitions, public access catalogue and OpenURL link resolver components. Describe how the ILL component is related to these and all other components of the system.

Other characteristics

12.3 The system should support the relevant standards related to ILL, specifically NCIP, ISO 10160, ISO 10161-1 and ISO 10161-2. Describe how these standards, or any other relevant ones, are implemented in the system.

12.4 Does the system provide any special ILL features for any specific supplier? If so, describe them, especially for our main ILL suppliers: British Library, Subito, OCLC

12.5 The system should provide, via the public access catalogue and the OpenURL link resolver, ILL self-services for end users, including the possibility of requesting materials, displaying their history of InterLibrary Loans or displaying the status of their requests.

12.6 It should be possible to limit the number of total yearly requests placed by a user. Describe how this can be achieved.

12.7 Describe any additional features or functionality

13. Reporting and Analytics

Mandatory requirements

13.1 The system must provide functionality to generate reports (lists, statistics, etc.) of the activity and performance, current and historical, of all areas of the Library, based on data resulting from all the types of records existing in the system or derivatives of this data. Describe this functionality.

13.2 The system must allow the Library to run reports one time, or several times following a predefined schedule, by means of a scheduler of tasks. Describe how the Library can run a single report once and how several times via this scheduler.

13.3 The system must allow the Library to run predefined reports or to run customised ones, providing selections based on data-based fields or configuration-based fields. Explain

the types of selections available in reports and how the Library can combine different fields for selection and for output.

13.4 The system must allow exporting data from any report for usage with third party applications or reporting tools, either interactively or via unattended means. Specify which export formats are supported, which methods are supported to export data and with which third party applications or reporting tools it is known to interface correctly with.

Other characteristics

13.5 The system should provide the necessary flexibility in its structure to allow importing and accommodating data from third parties into the reporting system, so as to relate this data with data existing in the system and take full advantage of the reporting capabilities of the system. Examples of this data could be COUNTER reports or logs from our proxy (see "EUI Library Technological Infrastructure"). Indicate if this is possible and describe the functionality.

13.6 The system should provide the Library with the tools to compare results from specific reports with results of equal or similar reports from other libraries, as well as to share its results with other libraries. Describe these tools.

13.7 Describe any additional features or functionality.

14. Public Access Catalogue

Mandatory requirements

14.1 The system must provide a public access catalogue, offering end users authenticated or guest access to the Library catalogue and holdings, print and electronic. Describe the functionality of this public access catalogue, with special attention to indexing, searching and result displaying features.

14.2 For authenticated users, the system must offer services that allow them to manage their circulation activity and to interface with the Library, including renewing loans, placing holds, creating lists of records, sending requests to the Library, recommending purchase of materials, etc. Describe which services are available for authenticated end users, indicating which of those services are also available for guest users.

14.3 Authentication for end users must be obtained using one of the methods described in "EUI Library Technological Infrastructure" or using the system's own authentication procedures. Indicate which specific methods are supported.

14.4 The public access catalogue must be customisable by the Library, to accommodate institutional branding and styling. Describe to which extent this is possible and which tools are available to do it as part of the system functionality.

14.5 An administration module must enable the Library to configure the behaviour and functionality of the public access catalogue. Describe this module, indicating what specific elements it covers and their impact in the functioning of the public access catalogue.

14.6 The public access catalogue must be adapted to display properly in all types of devices, resolutions and environments, either by using a responsive version or by using different versions of the interface. Describe your approach with respect to this.

14.7 The public access catalogue must provide OpenURL links using either the OpenURL link resolver of the system or an external one. Describe how OpenURL link resolvers are integrated in the public access catalogue.

Other characteristics

14.8 Data published in the public access catalogue should be updated in real time. Indicate from which types of records data are published in the public access catalogue, indicating in which cases this does not happen in real time.

14.9 It should be possible to suppress records from public display. Indicate which types of records can be suppressed from public display and how this is achieved.

14.10 It should be possible to create scoped versions of the Library catalogue accessible through the public access catalogue. The scopes should be based on parameters or data from records from the system (at least bibliographic, holdings and items records) and should be created via configuration tools available for the Library. Describe how Library catalogue scopes are managed in the system.

14.11 It should be possible for end users to pay their own fines and to have their accounts automatically updated using an online payment gateway interfacing with the system. Describe how this is achieved and with which gateways it is already possible.

14.12 The public access catalogue should comply with the WCAG 2.0 accessibility guidelines. Specify your level of compliance with these guidelines.

14.13 The public access catalogue should provide specific features for search results beyond the actual display of records, such as faceting, FRBR-isation of different versions or editions of the same title (especially when the Library has the print and electronic versions of a title) or suggesting follow-up searches or services. Describe these types of features.

14.14 The system should provide mechanisms to allow end users to keep track of new materials arrived in the Library. These can be generic (list of new acquisitions that is published by the Library) or personalised (via RSS feeds or by signing up to receive notifications via email, for instance). Describe which features the system provides related to this and what their configuration and personalisation options are.

14.15 Authenticated users should have access to their activity history, including returned loans, fulfilled or cancelled holds, messages, etc. They should also have the possibility to enable or disable activity history tracking. Describe this functionality.

14.16 The EUI maintains an important number of direct links in its web pages to records in the current EUI Library public access catalogue. These links are built using the Millennium identification number of the bibliographic record. Could the system provide a mechanism to prevent these links from breaking, even with usage of third-party systems or tools? Provide details about this.

14.17 Describe any additional features or functionality.

15. Central Index and Discovery Services (optional)

Mandatory requirements

15.1 On top of the public access catalogue, and complementing it, the system should provide a discovery service to allow searching and displaying the Library catalogue alongside a central index of electronic and print journals at article level and e-books at chapter level, as well as locally managed repositories or databases.

15.2 Describe how the metadata contained in the central index is managed, in terms of criteria for evaluating its quality, which sources are used to obtain it, how often it is updated and how it is enhanced or modified before its inclusion in the central index.

15.3 The file provided as Annex E contains a list of journal titles of core interest to the EUI Library. Provide a file indicating, for each journal title, whether it is indexed in the central index, the start and end years covered by the central index and the level of coverage of the indexing (metadata only, metadata + abstract, full text, etc.)

15.4 The file provided as Annex F contains a list of collections/databases of interest to the EUI Library. Provide a file indicating, for each collection/database, whether its contents are covered by the central index, what level of coverage is included (metadata only, metadata + abstract, full text, etc.), and which percentage of the collection/databases is covered.

15.5 The discovery service should allow harvesting metadata from OAI/PMH compliant repositories. Describe how this is done and indicate which specific formats are supported.

15.6 The discovery service should allow importing data from locally managed databases. Describe how this is done and indicate which specific formats are supported.

15.7 Describe any additional features or functionality.

Appendix: Classification and shelving schemes at the EUI Library

The EUI Library uses the following classification and shelving schemes:

Dewey

Used for most parts of the collection, for all topics except Law, European documentation and Statistics

Classification notations

Standard, except for the following two cases:

1. 19X notations may contain a three-letter suffix after the class number and attached to it with a hyphen. The following list is in the order expected:

    - 190-OWE
    - 191.1-SAN
    - 192-BEN
    - 193-ARE
    - 196.1-ORT
    - 199.439-LUK

2. 9XX notations may contain a one-letter suffix after the class number and attached to it with a hyphen. The following list is in the order expected:

    - 910.104-U
    - 929.30893931-D
    - 937.02-P
    - 949.12-J
    - 952.294-C
    - 973.90922-Q

In both cases and for sorting purposes, notations with suffixes are always sorted after notations with only the main classification number. Therefore, 196.1 precedes 196.1-ORT and 949.12 precedes 949.12-J. The following lists are in the order expected:

- Lib 197.2 Wal
- Lib 197.2-Bak Bak
- Lib 197.2-Bul Bul
- Lib 197.2-Bul Wil
- Lib 197.2-Fed Fed
- Lib 198.1 Nae
- Lib 198.9 Lip
- Lib 198.9 Low
- Lib 949.2 Row
- Lib 949.2 Soe
- Lib 949.2-B Hel
- Lib 949.2-C Dut
- Lib 949.2-C Fri
- Lib 949.201 Ste
- Lib 949.201 Wee
- Lib 949.201-B Gel

- Lib 198.9-Kie Ass
- Lib 949.201-U Luc

Also in both cases, suffixes are sorted in alphabetical order.

Shelfmark notations

They have the following structure:

Location prefix + [space] + Classification notation + [space] + Suffix

The following are examples of Dewey-based shelfmark notations at the EUI Library (the list is in the order expected):

- ARCHV 282.4 CIT
- CUR 50 SCIENT
- DESK 658.0072 COO
- DIC 422.403 SPE
- ENC 781.5603 DOH
- LIB 001.09034 RAY
- LIB 196.1 SAN
- LIB 196.1-ORT GRA
- LIB 949.2 SOE
- LIB 949.2 SOE
- RARE 084.1 MAR
- SER 34 CAMBRI
- VSP 330.015195 GRE
- WP 300.72 WIS

For sorting purposes, suffixes and prefixes are sorted in alphabetical order, and the classification notation following Dewey Decimal Classification standard rules (except for the two exceptions explained above)

Steiner

Used for LAW collection. This is a home-grown classification scheme consisting of three groups of characters that correspond with the main class, the subject and the form of the notation, in this order.

- Main class: Consists of one or more uppercase alphabetical characters. It is sorted in alphabetical order.
- Subject: Consists of one or more lowercase alphabetical characters. It is sorted in alphabetical order.
- Form: Consists of one of more numeric characters. It is sorted in decimal order.

Classification notations

Created by joining one of each of the above elements, without spaces. Tthe following list is in the order expected:

- Aa24
- Bqj9
- Dcjx9
- Erhe34
- EBnd9
- ERa9
- Fkd34
- FAa9
-

Shelfmark notations

They have the following structure:

Location prefix + [space] + Classification notation + [space] + Suffix

The following are examples of Steiner-based shelfmark notations at the EUI Library (the list is in the order expected):

- CAS ECa53 COMMON
- CAS Lx5 DEUTSC
- CAS LTa5 ENTSCH
- DESK ECce9 CON
- DESK Pr9 BAR
- DESK PPf5 ACORDA
- LAW Erhe9 EMP
- LAW EBa9
- LAW ECa28
- LAW ECa9
- LAW ECa92
- LAW ECuxdpe9
- LAW ECuxem28
- LAW EDAa9
- LAW EDBa9
- LAW Pfdh9
- LAW PPf92
- LAW Zfm9 BAZ
- MAG1 NBv9 KOB
- OFF Ma42 GAZZET
- PAR HHa3 PARLIA
- THESES De9 KNO

For sorting purposes, suffixes and prefixes are sorted in alphabetical order, and the classification notation following Steiner classification rules.

EDC

Used for the European Documentation Centre collection. This is a home-grown classification scheme consisting of three groups of two characters each that correspond with the issuing body, the main constituent body or subject and the form of the notation, in this order.

- Issuing body: Consists of two uppercase alphabetical characters. It is sorted in alphabetical order.
- Main constituent body or Subject: Consists of two uppercase alphabetical characters. It is sorted in alphabetical order.
- Form: Consists of two numeric characters. It is sorted in numerical order.

Classification notations

Created by joining one of each of the above elements, with hyphens. The following list is in the order expected:

- CO-AA-33
- CO-MM-99
- CS-FF-33
- EA-FF-33
- EB-HP-99
- EC-GP-66
- EC-RT-33
- WE-AA-33

Shelfmark notations

They have the following structure:

Location prefix + [space] + Classification notation + [space] + Suffix (+ year)

The following are examples of EDC-based shelfmark notations at the EUI Library (the list is in the order expected):

- EDC CO-HH-33 COLEOT11
- EDC EC-AA-99 TREATY 1993
- EDC EC-CC-99 EURCCS22
- EDC EC-HP-99 COMPF33
- EDC FF-66 COMD22

For sorting purposes, suffixes and prefixes are sorted in alphabetical order, and the classification notation following EDC classification rules.

CHAPTER III - ECONOMIC SPECIFICATIONS

1. The Economic Proposal must be specified using the form in Annex G.

- **Total cost**

The tenderer should clearly indicate the total cost for seven years of the Integrated Library System, including all the services offered.

- **Breakdown**

A breakdown by year should be presented separately for the Integrated Library System and for the Central index and discovery service, along with an itemised description of the following:

  - One-time costs, such as for implementation and training (including travel and accommodation expenses)
  - Recurring costs.

CHAPTER IV – FINAL PROVISIONS

1. Submission of a tender implies acceptance of all the terms and conditions set out in the invitation to tender, in this tender specifications and in the draft contract and, where appropriate, waiver of the tenderer's own general or specific terms and conditions. Submission of a tender is binding on the tenderer to whom the contract is awarded for the duration of the contract.

2. These Tender specifications consist of Chapter One (ten articles), Chapter two (fifteen articles and one Appendix), Chapter III (one article), Chapter IV (two articles).They cover 41 pages plus eight Annexes (A-H), each and every one of them being an integral part of these Tender Specifications.