

REF: OP/EUI/LIB/2017/001

**Open call for Tender for the Supply of Periodicals to the Library of the European University Institute**

NAME OF THE TENDERER	
LOT(S)	

**Instructions**

- **If the offer is the same for more than one lot, only one technical offer form may be used. If not, each offer 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 requirements.
- 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**

## B1 Ordering and supply

### 1.1 New orders

Questions	Responses
Describe your general procedures, step by step, for setting up new subscriptions. Indicate the time taken for each step.	
Explain how bundle or package subscriptions are handled.	
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.	
State how you handle subscriptions for material published at irregular intervals.	

### 1.2 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 making a decision to move subscriptions to e-only format.	
With reference to annual renewals, describe how you would deal with non-calendar year subscriptions.	

### 1.4 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.).	
Describe your troubleshooting procedures in case of access problems, indicating speed and efficiency.	

### 1.5 Non-print media

Questions	Responses
Do you supply non-print media?	
Describe the range of titles you would be able to supply. Are there any limitations on formats and/or publishers?	

### 1.6 Back issues

Questions	Responses
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.	

### 1.7 Delivery

Questions	Responses
Describe your delivery agreements with publishers.	
Specify the number of days between publication and dispatch for direct delivery.	

### 1.8 Claims

Questions	Responses
Describe in detail your claiming procedure in order to comply with these requirements. Indicate the time taken for each step.	
Describe your procedure when there is no satisfactory reply from the publisher.	
Describe your Platform with reference to claiming.	
Do you offer any additional services regarding claims? If so, describe them.	

### 1.9 Invoicing

Questions	Responses
Send a sample of an invoice on paper.	
Describe the workflow process for making EDI 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.	

## B2 Services

### 2.1 Quality and Customer Service

Questions	Responses
For how many years have you provided these kinds of services? 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.	
Describe your problem-solving procedures, troubleshooting, etc.	
Provide any evidence of client satisfaction with the services delivered.	
Provide information on the Supplier's membership of a trade association or similar.	
Describe your prerequisites for your Customer Service representatives: (e.g. qualification, turnover, experience, etc.)	

### 2.2 Communication policy

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

### 2.3 Bibliographic services and management information

Questions	Responses
<p>Activate temporary access to your Subscription Management System, and provide instructions including URL and Username/Password.</p>	
<p>State the size (total number of titles and of current titles) of your Subscription Management System.</p>	
<p>Describe the features for viewing Library's subscription information online, such as order numbers, invoicing, claiming and e-journal access information (platform, URL, etc.).</p>	
<p>Describe the provision and content of your management information reports, including expenditure reports. Describe their structure and accessibility.</p>	
<p>Do you provide e-journal usage statistics reports? Declare if this service is free or if any charges are applied (No price quotations).</p>	
<p>The Library is interested in a new titles alerting service in the relevant subject areas. Describe the service if available.</p>	



## 2.4 Journal packages

Questions	Responses
<p>Describe your services and procedures for the administration of packages negotiated by the Library or by consortia. Include how you manage the processing of title lists, discounts, etc. with publishers and/or consortia.</p>	
<p>Describe how you handle e-journal packages with the publisher, including the annual renewal and license negotiations on behalf of the Library.</p>	

## 2.5 IT requirements

Questions	Responses
<p>Describe your IT services giving detailed information about your compliance with the EDI X12 standard and Symphony, specifically regarding:</p> <ol style="list-style-type: none"> <li>a. X12 electronic claiming</li> <li>b. X12 electronic invoicing</li> <li>c. Supplier subscription number supplied with X12 electronic invoice</li> <li>d. Other services compliant with EDI X12 standards or the Symphony system</li> <li>e. Which other standards do you support?</li> </ol>	
<p>Describe any developments specific to Symphony or other SirsiDynix product which you have created.</p>	

## 2.6 Transfer arrangements

Questions	Responses
Describe your procedures for assisting the Library to transfer subscriptions 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 periodicals including order number, title, ISSN, describe how your subscription reference numbers can be supplied for loading into the Integrated Library System.	

**Additional information**

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

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

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