

Serials, Periodicals, and Associated Services (Print and Digital) (LIB4054 SU)

SUMMARY

Start date: 1st August, 2023

End date: 31st July, 2025

OJEU Number: 2023/S 077-231460

Lead Consortium: SUPC

Main contact: Gavin Phillips
g.j.phillips@reading.ac.uk

Website:
<https://www.hecontracts.co.uk/agreements/1089>

- Transparent pricing and a pricing structure with competitive handling charges / discounts fixed for the duration of the agreement, with flexible options built in to adapt to the significant market changes expected in this industry over the coming years. The flexibility built in will allow the sector to manage potential risks both for Members and the supply market;
- Standard favourable Call-Off terms and conditions applicable to all Members, with document templates available for easy contract execution;
- Robust Joint Consortia Agreement Management structure which ensures support and escalation points for all member institutions.

SCOPE

This Agreement is for the supply of electronic and printed serials, journals and associated subscription services via subscription agents (intermediaries), including domestic and overseas materials from any publisher or 3rd party willing to trade via the Suppliers on this Agreement. A copy of the specification used in the framework tender process can be found on the HE Contracts database.

Associated services must support and relate to the supply and management of electronic and/or printed subscription resources and may include (but not be limited to) services relating to usage data and improving value for money.

AGREEMENT BENEFITS

- Robust tendering and evaluation process which has tested the Supplier capabilities to meet an agreed minimum set of requirements on behalf of participating consortia;
- Transparent pricing and a pricing structure with competitive handling charges / discounts fixed for the duration of the agreement, with options for annual pricing reviews to allow supplier pricing to flex with ongoing and significant market changes. This flexibility will aid the sector in managing potential risks both for Members and the supply market;
- Standard favourable Call-Off terms and conditions applicable to all Members, with document templates available for easy contract execution;
- Agreed minimum Key Performance Indicators with all Suppliers, which can be adopted by each individual member institution, or can be adapted as necessary for specific requirements;
- Robust Joint Consortia Agreement Management structure which ensures support and escalation points for both member institutions and suppliers.

USING THE FRAMEWORK

Option One – Direct Award

If selecting this route, Institutions may issue a direct award to any supplier on the Framework providing:

- The Member institution is satisfied with specification, contractual terms and rates set down in the Framework Agreement and no refinement is necessary;
- The Member institution carries out appropriate due diligence to determine the most economically advantageous supplier to meet the Member’s requirements;
- Any due diligence carried out must be recorded and requires objective justification of the decision.

*Note, this agreement is not ranked and therefore is no requirement for a Member institution to direct award to the highest scoring supplier on the Framework.

The award of a contract will take place after the institution has discussed its specific requirements with the selected supplier and agreement has been reached as to timescales, methodology/approach, specific service requirements and key milestones and performance indicators to be met. The Standard Terms and Conditions of any call-off contract shall be as those stated in the framework agreement and call-off.

Option Two - Desktop Exercise

If institutions are comfortable with the terms of the proposed contract, and these do not require amendment or supplementary conditions then member institutions may use a desktop calculator to determine the most appropriate Supplier. The desktop calculator tool is available on the HE Contracts Database and includes full instructions.

If this option is chosen, Member institutions will use the tool by inputting pricing relevant to the specific requirements of the institution and if required, amending the criterion weightings by up to 20 percentage points to reflect local priorities. The tool will automatically calculate revised scoring and identify the most economically advantageous Supplier. Once complete, you should place your contract with the highest scoring supplier.

Option Three – Further-Competition

Institutions wishing to undertake a further-competition may do so. A further competition re-opens competition amongst the Suppliers on the Framework and all the supplier(s) must be invited to submit responses to the institution’s further-competition document.

The original framework agreement evaluation criteria should be applied in the further-competition tender document, though the criteria weightings may be adjusted by up to 20 percentage points in line with local institution requirements. As this is a Most Economically Advantageous Tender (MEAT) framework agreement, both technical and commercial evaluation criteria must be used in a further-competition tender process.

The Evaluation Criteria that should be used for evaluating further-competitions, along with the original weightings used in the Framework are set out below:

Price	Quality 80%				
	20%	Contract Management & Reporting	Subscription Management	Subscription Management System	Payments, Invoicing & Credits
20	15%	25%	15%	15%	10%

Please note: Additional technical criteria cannot be introduced. Sub-criteria under the criteria above can be introduced but must be relevant to the requirement and criteria.

Notes:

- The same questions asked during the tender, should not be asked at further-competition. However, refinements can be made where more specific information is required in relation to your institution.
- Prices and charges submitted at the ITT stage of the Framework tender are capped, and will be the highest rate chargeable by a supplier at further-competition stage.

Appointing multiple Suppliers:

Please note multiple suppliers can be appointed, although care must be taken not to create a ‘framework within a framework’. There must be a clear mechanism in place to determine which supplier will receive an order. For example: *all orders without consolidation service requirements will go to Supplier 1, all orders that require a Consolidation Service will go to Supplier 2.*

SUPPLIERS

SUSTAINABILITY

Responsible Procurement formed 10% of the framework score with tender questions focussed on:

- Environmental Sustainability
- Equality, Diversity, and Inclusion
- Social Value

NEXT STEPS

To start taking advantage of this agreement right away, please visit the Serials, Periodicals and Associated Services (Print and Digital) Agreement page on HE Contracts Database. From there, you can view the contracts, suppliers, supplier contact details, terms and conditions and a complete buyer's guide.

If you need assistance, please contact the person with responsibility for procurement at your institution, or SUPC Category Manager Gavin Phillips at g.j.phillips@reading.ac.uk