

Methodology of expansion of the CzechELib consortia

Methodology proposal prepared by the CzechELib executive team: x. x. xxxx
On recommendation/with knowledge of the Technical board: x. x. xxxx
Date of approval by the Managerial board of the CzechELib: x. x. xxxx

Used abbreviations:

CEL	CzechELib
MI	CzechELib Member Institution
EIR	Electronic Information Resource
NPWN	Negotiation Procedure Without Notice
TB	CzechELib Technical Board
EIR Provider	Publisher or exclusive supplier of EIR
MB	CzechELib Managerial Board
PI	CzechELib Participating Institution
RDI	Research, Development and Innovation
T	Tender

Introduction

The Institution has to announce its **interest in EIR/admission to CEL consortia** adequately in advance, ideally during spring, when the collection of requirements for EIR subscriptions for the next calendar year is underway, but by the latest on 31st of March. All messages concerning interest registered before 31st of March will be considered delivered at the same time (no delivery time priority applies).

In case of later delivery it is the decision of the CzechELib Technical Board whether to start the joining process (that goes for approval or rejection alike).

During evaluation of listing EIR into the CEL portfolio TB considers especially:

- whether the designated EIR supports RDI
- whether the project methodologies' conditions for EIR selection are fulfilled
- economic aspects

For the nominated EIRs, CEL ensures appraisal by their providers and then it proceeds according to steps stated below.

Exceptions from procedures mentioned in this Methodology will always be evaluated by the TB, which will then present its proposals for approval by the MB.

Definition:

New institution (participating) is an institution that isn't a member of any CEL consortium and has shown interest in membership.

Member institution, without Contract of centralized assigning is an institution that wasn't an authorized client in T, in which an EIR which it proposed was approved.

Member institution with Contract of centralized assigning is an institution that was an authorized client in T, in which a proposed EIR was also secured, but it didn't subscribe to the given EIR during the duration of T.



New EIR is an EIR that is not currently accessible via CEL, and it is neither in a tender nor contracted.

Already purchased EIR is an EIR currently accessible via CEL, for which CEL has already closed a contract with its Provider.

Modified EIR is an already purchased EIR with trivial modifications – for example a modified collection from the same publisher, etc. Whether it is a new or modified EIR will be evaluated by TB.

Procedure:

Subject type/EIR type	New EIR	Modified EIR	Already purchased EIR
Necessity of Technical Board statement	YES	YES (evaluates especially whether it is a modified or completely new EIR)	NO (already approved)
New institution	T*	T*	T*
MI without Contract of centralised assigning (within boundaries of T, in which a given EIR was acquired)		T*	T*
MI with Contract of centralised assigning (within boundaries of T, in which a given EIR was acquired)		<ul style="list-style-type: none"> Without T** If all demands of MI will be up to the limit of 3.8 mil CZK or 10% of original T***; necessary amendment of Contract of securing and enabling EIS T* above the limit of 3.8 mil CZK or 10% of original T*** 	<ul style="list-style-type: none"> Without T** If all demands of MI will be up to the limit of 3.8 mil CZK or 10% of original T***; new Contract of centralised assigning and amendment of Contract of securing and enabling EIS is necessary T* above the limit of 3.8 mil CZK or 10% of original T***

* If the expansion of the consortium creates the necessity of announcing a tender, it is necessary to fulfil the condition of minimal number of attending participants according to the project Methodology.

** It is not necessary to fulfil the condition of minimal number of attending participants according to the project Methodology.

*** This concerns the limit on T, not on the institution or given EIS. Limits are given by law no. 134/2016 Coll., on public procurement, in case of any revisions they may change.

Example: The prices of individual amendments to the license contract are cumulative, i.e. limits mentioned in the table are valid for total sum of all individual amendments. I.e. if the first amendment (for example in 2018) will create a raise of 1 mil. CZK, then for the potential amendment in 2019 only 2.8 mil. CZK remains (assuming that 10 % limit is higher than 3.8 mil. CZK).

Note: For institutions that can't join the CEL contract, CzechELib can offer consultation and support for their individual negotiations and possible use of a consortial discount.

