

Methodology for expanding the CzechELib consortia, version 2

Principle assessed and recommended by the CzechELib Expert Council: 13/12/2018
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Abbreviations used:

CEL	CzechELib
MI	CzechELib Member Institution
EIR	Electronic Information Resource
NPWP	Negotiated Procedure without Publication
EC	CzechELib Expert Council
EIR provider	EIR publisher or exclusive supplier
SC	CzechELib Steering Committee
PI	CzechELib Participating Institution
R&D&I	Research, Development and Innovation
PC	public contract

Introduction

An institution must **announce its interest in EIR/joining the CEL consortia** sufficiently in advance, ideally at the beginning of each calendar year when the collection of EIRs subscription requests for the following calendar year always takes place, and no later than **by 31/3**. All declarations of interest reported before 31/3 are considered to have been delivered at the same time, meaning priority according to the time of delivery does not apply here.

In the case of later delivery, the decision as to whether the EIR will be secured is fully within the competence of the CzechELib expert team.

When assessing the inclusion of EIR in the CEL portfolio, the EC and the CzechELib executive team take into account :

- whether the EIR is intended to support R&D&I
- compliance with the CzechELib's EIR Selection Methodology
- economic aspect
- the time aspect (for requests after 31/3)

For nominated EIRs, CEL will secure indicative pricing from their providers, then confirm with the institutions their continuing interest, and then carry out the steps below.

Exceptions to the procedures set out in this Methodology will always be assessed by the EC and subsequently submitted to the CzechELib Steering Committee.

Definitions:

A **new institution (participating)** means an institution that is not a member of any CEL consortium and that has expressed an interest in membership.



A member institution without a Centralized Procurement Agreement/Framework Agreement means an institution that was not the authorizing contracting authority in the PC through which the requested EIR was secured.

A member institution with a Centralized Procurement Agreement/Framework Agreement means an institution that was the authorizing contracting authority in the PC through which the requested EIR was also secured, but had not subscribed to the given EIR at the time of the PC.

New EIR means an EIR not currently not being tendered or contracted and is not made available through CEL

Already acquired EIR means an EIR currently made available through CEL, for which CEL has already concluded an agreement with its Provider.

A modified EIR means an already acquired EIR with an insignificant modification - e.g. a modified collection from the same publisher, etc.

Procedure:

Subject type/ EIR type	New EIR	Modified EIR	Already acquired EIR
Need for opinion from the Expert Council	YES	YES (assessed in particular for both modified or completely new EIR)	NO (already approved in the past)
New institution		PC*	PC*
MI without a Centralized Procurement Agreement/Framework Agreement (within the framework of the PC through which the given EIR was acquired)		PC*	PC*



<p>MI with a Centralized Procurement Agreement/Framework Agreement (within the framework of the PC through which the given EIR was acquired)</p>	<p>PC*</p>	<p>• Without a PC** if all member institution requests are within the limit of CZK 3.568m or 10% of the original value of the PC***; necessary amendment to the Agreement on the Provision and Access to Electronic Information Resources</p>	<p>• Without a PC** if all member institution requests are within the limit of CZK 3.568m or 10% of the original value of the PC***; necessary new Centralized Purchase Agreement and Agreement on the Provision and Access to Electronic Information Resources</p>
		<p>• PC* over the limit of CZK 3.568m or 10% of the original value of the PC***</p>	<p>• PC* over the limit of CZK 3.568m or 10% of the original value of the PC***</p>

* If the expansion of the consortium means the need to announce a PC, it is necessary to meet the condition of a minimum number of acceding participants according to the project Methodologies.

** The amendment can also be implemented for a single institution.

*** This is the limit for the PC, not for the institution or the given EIR. The limit of CZK 3.568m is determined by Government Decree No 335/2019, amending Government Decree No 172/2016, on Setting Financial Limits and Amounts for the Purposes of the Public Procurement Act, as amended by Government Decree No 471/2017, and the limit of 10% is determined by Act No 134/2016, on Public Procurement (APP). In the event of an amendment to any of the above regulations, these may be changed.

Example: The prices of individual amendments to a license agreement are cumulative, meaning that the limits mentioned in the table apply to the sum of all the individual amendments. I.e., if the first amendment (e.g. in 2018) will mean an increase of CZK 1m, then for a possible amendment in 2019 there only remains CZK 2.568m (assuming the 10% limit is higher than CZK 3.568m).

