

Tender Document

ERM and Discovery service b-on

TENDER DOCUMENT

1. Scope

Fundação para a Ciência e a Tecnologia (FCT, I.P.) intends to acquire a ERM and Discovery service for b-on, which must include the supply of the items identified in annex A with the characteristics also mentioned in annex A to D.

2. Term

1. The contract enters into force on the date of its signature.
2. The contract will terminate 3 years after the conclusion of the implementation phase¹

3. Price and payment conditions

1. For the purchase contemplated in the contract, FCT will pay a maximum amount of \$ 95.132,00 (ninety-five thousand one hundred thirty-two dollars).
 2. FCT will pay the successful bidder the price for which the bidder proposes to supply the services mentioned in this tender document.
 3. The payment will be made through the issuance of 6 invoices, under the following terms:
 - a) 50% of the Implementation Fee is due Date;
 - b) 30% of the Implementation Fee is due upon providing Customer with access to the cloud environment;
 - c) 20% of the Implementation Fee is due on the Go Live Date;
 - d) The initial Subscription Fee is for the one-year period commencing on the Go Live Date (the "Subscription Effective Date"), and each subsequent Subscription Fee is for the one-year period commencing on each anniversary thereof. The Subscription Fee is due on the Subscription Effective Date and on each anniversary thereof.
 4. The invoices will be paid within 30 days of receipt.
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¹ The contract has a term of more than 3 years as an implementation phase is required before the tools and services covered by the contract can be used. Therefore, the total term of the contract will be 3 years in which those tools and services are used plus the amount of time needed for their implementation.



5. Management of the contract

Joana Novais is designated for the purposes of monitoring the performance of the contract under the terms of article 290 of the Code of Public Procurement.

6. Applicable law

The contract will be ruled by Portuguese law.



ANNEX A

Programs

The supplier shall provide the following programs in SaaS regime:

Electronic Resource Management System (ERM)

- Management of acquisitions and activation of resources
- Integration with external systems (e.g catalogs)
- Integration with Discovery System
- Includes implementation stage (Data migration, system configuration, functional testing) and training

Discovery Service (DS)

- HTML and PDF full text formats;
- Full open access button/link availability;
- Discovery Service basic tools: filters, export citations, bibliographic details record
- Comprehensive knowledge Index updated daily. Publishers, databases, aggregators and collections, to integrate in the central index are listed in Annex C;
- Knowledge base search service for publications in b-on holdings;
- Intelligent relevance algorithm;
- Implementation of thematic/institutional profiles;
- Integration of research starters (sort of wikipedia scientific encyclopedias);
- Auto complete multi language for the search terms;
- Auto complete of titles subscribed in real time;
- SSO with Shibboleth and/or SimpleSAMLphp Shibboleth (SAML 2.0) / Athens and creation of automatic account;
- Ability to create union catalogs based on data downloaded by members subscribers of DS catalog;
- Possibility of ILL module integration by institution;
- Support and interface versions for mobile devices;
- Integration with Scopus and WOS metadata, including number of citations at the record level;
- Integration of impact factor JCR and Scimago at the record level;
- Image search based on metadata;
- Customization of interfaces according to customer needs in SaaS mode;
- Development of API and modules for several apps (Moodle, Vufind, Drupal, etc.);
- Integration of audio tools (listen articles in HTML) for people with disabilities;
- Integration with several thesaurus (Mesh, Inspec, Hein Online, etc.);
- Ability to search individually in the content of a single journal;
- The research interface must be in Portuguese from Portugal;



- The research interface must be customized to b-on's profile/interface;
- User individual registration/login to personal account (folders, alerts and save and export citations);

The subscription will cover up to 70 member institutions (current member list provided in Annex D).

Link Resolver

- OpenURL compliant;
- Integration with Google Scholar;
- Single management interface;
- Automatic integration of subscriptions and access to html and PDF full text;
- Placard in the search results list with the exact title identifying suppliers and their subscription years;
- Ability to search individually in the content of a single journal;



ANNEX A: MAINTENANCE AND SUPPORT SERVICES

- a) The maintenance and support services to be supplied by the supplier include the following:
- Central secured data center;
 - Monitoring services;
 - Redundant infrastructure systems with no single point of failure (power, climate control, fire control);
 - Redundant infrastructure devices – no single point of failure (routers, firewalls, load balancer, switches, storage);
 - Backups;
 - Hardware and operating system upgrades and patches;
 - Application upgrades, patches, and maintenance;
 - Application availability based on SLA as delineated in Annex B;
- b) Training (b-on team and end users). Online training and production of materials (e-learning and e-flyers).
- c) All reasonable efforts to resolve claimed errors or faults reported by FCT to the supplier, supply of revisions and updates, supply of migration tools requested by the CUSTOMER for new versions of the PROGRAMS;
- d) Support documentation for the versions of the SOFTWARE supplied;
- e) Implementation services of the solution for b-on consortium;

The supplier shall grant to FCT the right to access and use the Programs in SaaS regime identified as such in in this document during the contract's term.



ANNEX B: Supplier's Response of Support Incidents

The supplier shall commit to the following levels of response to incidents:

Response level	Description	Initial response	Status Updates
I	The SaaS Service is not available	2 business hours	Every 4 business hours until resolution
II	An inoperable production module	4 business hours	Every 8 business hours until resolution
III	Other production performance related issues, typically a module feature working incorrectly	2 business days	Every week until resolution or determination as a defect or enhancement request
IV	Non-performance related incidents, including: general questions, requests for information, documentation questions, enhancement requests	4 business days	Every 2 weeks until resolution or determination as a defect or enhancement request



ANNEX C

List of publishers, databases, aggregators and collections, with their metadata, to integrate in the central index:

- ACM_DIGITAL_LIBRARY
- ACM_DIGITAL_LIBRARY_PROCEEDINGS
- AGECON_FREE
- AIP_JOURNALS
- AMERICAN_CHEMICAL_SOCIETY_JOURNALS
- ANNUAL_REVIEWS_COMPLETE
- BIOMED_CENTRAL_JOURNALS_FREE
- BIOMED_CENTRAL_OPEN_ACCESS_FREE
- BIOMED_CENTRAL_SELECTED_FREE
- CLARIVATE - WEB OF SCIENCE (1899-PRESENT)
- CLARIVATE - WEB OF SCIENCE - SCIENCE CITATION INDEX EXPANDED (1899-PRESENT)
- CLARIVATE - WEB OF SCIENCE - SOCIAL SCIENCE CITATION INDEX (1955 – PRESENT)
- CLARIVATE - WEB OF SCIENCE - ARTS & HUMANITIES CITATION INDEX (1975 – PRESENT)
- CLARIVATE - WEB OF SCIENCE - CONFERENCE PROCEEDINGS CITATION INDEX (1990 – PRESENT)
- CLARIVATE - WEB OF SCIENCE - INDEX CHEMICUS (1993 – PRESENT)
- CLARIVATE - WEB OF SCIENCE - CURRENT CHEMICAL REACTIONS (1986 – PRESENT)
- CLARIVATE - CURRENT CONTENTS (1998-PRESENT)
- CLARIVATE - DERWENT INNOVATION INDEX (1963-2012)
- CLARIVATE - KCI (1980 – PRESENT)
- CLARIVATE - MEDLINE (1950-PRESENT)
- CLARIVATE - SCIELO CITATION INDEX (1997 – PRESENT)
- CLARIVATE - JOURNAL CITATION REPORTS (1997 – PRESENT) & ESSENTIAL SCIENCE INDICATORS (10 YEARS ROLLING FILE)
- COIMBRA_UNIVERSITY_PRESS_IMPACTUM_JOURNALS
- COIMBRA_UNIVERSITY_PRESS_POMBALINA_BOOKS
- DOAB_DIRECTORY_OPEN_ACCESS_BOOKS_FREE
- DOAJ_DIRECTORY_OPEN_ACCESS_JOURNALS_FREE
- DOI
- EBSCOHOST_ACADEMIC_SEARCH_COMPLETE
- EBSCOHOST_BUSINESS_SOURCE_COMPLETE
- EBSCOHOST_CINAHL_WITH_HEADINGS
- EBSCOHOST_CINAHL_PLUS_WITH_FULL_TEXT
- EBSCOHOST_eBOOK ACADEMIC COLLECTION
- EBSCOHOST_HEALTH_BUSINESS_FT_ELITE
- EBSCOHOST_MEDLINE_WITH_FULL_TEXT
- EBSCOHOST_PSYCHOLOGY_AND_BEHAVIORAL_SCIENCES



- ELSEVIER_SD_FREEDOM_COLLECTION
- ELSEVIER_SD_FREE_ACCESS_JOURNALS
- EMERALD_A-Z_JOURNALS
- EMERALD_BUSINESS, MANAGEMENT AND STRATEGY EJOURNALCOLLECTION - EBMS
- EMERALD_ACCOUNTING, FINANCE AND ECONOMICS EJOURNAL COLLECTION - EAFE
- EMERALD_HEALTH AND SOCIAL CARE EJOURNAL COLLECTION - EHSC
- EMERALD_ENGINEERING EJOURNAL COLLECTION - EENG
- EMERALD_MARKETING EJOURNAL COLLECTION - EMAR
- EMERALD_HR, LEARNING AND ORGANIZATION STUDIES EJOURNAL COLLECTION - EHRLOS
- EMERALD_EDUCATION EJOURNAL COLLECTION - EEDU
- EMERALD_LIBRARY STUDIES EJOURNAL COLLECTION - ELIB
- EMERALD_PROPERTY MANAGEMENT & BUILT ENVIRONMENT EJOURNAL COLLECTION - EPMBE
- EMERALD_OPERATIONS, LOGISTICS AND QUALITY EJOURNAL COLLECTION - EOLQ
- EMERALD_INFORMATION AND KNOWLEDGE MANAGEMENT EJOURNAL COLLECTION - EIKM
- EMERALD_PUBLIC POLICY AND ENVIRONMENTAL MANAGEMENT EJOURNAL COLLECTION - EPPEM
- EMERALD_TOURISM AND HOSPITALITY MANAGEMENT EJOURNAL COLLECTION - EMTH
- EDUCATION RESOURCE INFORMATION CENTER – ERIC_FULL_TEXT
- ERUDIT_OPEN_ACCESS_JOURNALS_FREE
- HIGHWIRE_PRESS_FREE
- IEEE_XPLORE_ASPP
- IEEE_XPLORE_CONFERENCE_SERIES
- IEEE_XPLORE_JOURNALS
- IEEE_XPLORE_POP_ALL
- INSTITUTE_OF_PHYSICS_JOURNALS
- JSTOR_EARLY_JOURNAL_CONTENT_FREE
- LIBRARY INFORMATION SCIENCE ABSTRACTS - LISA
- NATURE
- NCBI_PUBMED_FREE
- OAPEN_FREE
- PORTICO_ARCHIVE
- PROQUEST_CENTRAL
- PROQUEST_ONE_BUSINESS
- PROQUEST_ONE_EDUCATION
- PROQUEST_ONE_PSYCHOLOGY
- PUBMED_CENTRAL_JOURNALS_FREE
- PUBMED_CENTRAL_OPEN_ACCESS_FREE



- RCAAP
- ROYAL_SOCIETY_OF_CHEMISTRY_ONLINE_JOURNALS
- ROYAL_SOCIETY_OF_CHEMISTRY_ONLINE_JOURNALS_ARCHIVE
- ROYAL_SOCIETY_OF_CHEMISTRY_ONLINE_JOURNALS_FREE
- ROYAL_SOCIETY_OF_CHEMISTRY_DATABASES
- SAGE_COMMUNICATION_MEDIA_STUDIES_COLLECTION
- SAGE_PREMIER_COLLECTION
- SAGE_EDUCATION_COLLECTION
- SAGE_MANAGEMENT_AND_ORGANIZATION_STUDIES_COLLECTION
- SAGE_MATERIALS_SCIENCE_ENGINEERING_COLLECTION
- SAGE_NURSING_PUBLIC_HEALTH_COLLECTIONS SAGE_ORTHOPAEDICS AND SPORTS MEDICINE_COLLECTION
- SAGE_ONCOLOGY_COLLECTION
- SAGE_PHARMACOLOGY_AND_BIOMEDICAL_COLLECTION
- SAGE_POLITICS_INTERNATIONAL_RELATIONS_COLLECTION
- SAGE_PSYCHOLOGY_COLLECTION
- SAGE_SOCIOLOGY_COLLECTION
- SAGE_URBAN_STUDIES_AND_PLANNING_COLLECTION
- SCIELO_FREE
- SIAM_SOCIETY_FOR_INDUSTRIAL_AND_APPLIED_MATHEMATICS_CURRENT
- SPRINGER_LINK_BOOKS_ARCHITECTURE_AND_DESIGN_2005
- SPRINGER_LINK_BOOKS_ARCHITECTURE_AND_DESIGN_2006
- SPRINGER_LINK_BOOKS_ARCHITECTURE_AND_DESIGN_2007
- SPRINGER_LINK_BOOKS_ARCHITECTURE_AND_DESIGN_2008
- SPRINGER_LINK_BOOKS_BEHAVIORAL_SCIENCE_2005
- SPRINGER_LINK_BOOKS_BEHAVIORAL_SCIENCE_2006
- SPRINGER_LINK_BOOKS_BEHAVIORAL_SCIENCE_2007
- SPRINGER_LINK_BOOKS_BEHAVIORAL_SCIENCE_2008
- SPRINGER_LINK_BOOKS_BIOMEDICAL_AND_LIFE_SCIENCES_2006
- SPRINGER_LINK_BOOKS_BIOMEDICAL_AND_LIFE_SCIENCES_2007
- SPRINGER_LINK_BOOKS_BIOMEDICAL_AND_LIFE_SCIENCES_2008
- SPRINGER_LINK_BOOKS_BIOMEDICAL_AND_LIFE_SCIENCES_2009
- SPRINGER_LINK_BOOKS_BUSINESS_AND_ECONOMICS_2005
- SPRINGER_LINK_BOOKS_BUSINESS_AND_ECONOMICS_2006
- SPRINGER_LINK_BOOKS_BUSINESS_AND_ECONOMICS_2007
- SPRINGER_LINK_BOOKS_BUSINESS_AND_ECONOMICS_2008
- SPRINGER_LINK_BOOKS_CHEMISTRY_AND_MATERIAL_SCIENCE_2005
- SPRINGER_LINK_BOOKS_CHEMISTRY_AND_MATERIAL_SCIENCE_2006
- SPRINGER_LINK_BOOKS_CHEMISTRY_AND_MATERIAL_SCIENCE_2007



- SPRINGER_LINK_BOOKS_CHEMISTRY_AND_MATERIAL_SCIENCE_2008
- SPRINGER_LINK_BOOKS_COMPLETE
- SPRINGER_LINK_BOOKS_COMPUTER_SCIENCE_WITHOUT_LECTURE_NOTES_2005
- SPRINGER_LINK_BOOKS_COMPUTER_SCIENCE_WITHOUT_LECTURE_NOTES_2006
- SPRINGER_LINK_BOOKS_COMPUTER_SCIENCE_WITHOUT_LECTURE_NOTES_2007
- SPRINGER_LINK_BOOKS_COMPUTER_SCIENCE_WITHOUT_LECTURE_NOTES_2008
- SPRINGER_LINK_BOOKS_COMPUTER_SCIENCE_WITHOUT_LECTURE_NOTES_2009
- SPRINGER_LINK_BOOKS_EARTH_AND_ENVIRONMENTAL_SCIENCE_2005
- SPRINGER_LINK_BOOKS_EARTH_AND_ENVIRONMENTAL_SCIENCE_2006
- SPRINGER_LINK_BOOKS_EARTH_AND_ENVIRONMENTAL_SCIENCE_2007
- SPRINGER_LINK_BOOKS_EARTH_AND_ENVIRONMENTAL_SCIENCE_2008
- SPRINGER_LINK_BOOKS_EARTH_AND_ENVIRONMENTAL_SCIENCE_2009
- SPRINGER_LINK_BOOKS_ENGINEERING_2005
- SPRINGER_LINK_BOOKS_ENGINEERING_2006
- SPRINGER_LINK_BOOKS_ENGINEERING_2007
- SPRINGER_LINK_BOOKS_ENGINEERING_2008
- SPRINGER_LINK_BOOKS_HUMANITIES_SOCIAL_SCIENCES_AND_LAW_2005
- SPRINGER_LINK_BOOKS_HUMANITIES_SOCIAL_SCIENCES_AND_LAW_2006
- SPRINGER_LINK_BOOKS_HUMANITIES_SOCIAL_SCIENCES_AND_LAW_2007
- SPRINGER_LINK_BOOKS_HUMANITIES_SOCIAL_SCIENCES_AND_LAW_2008
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_COMPUTER_SCIENCE_2005
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_COMPUTER_SCIENCE_2006
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_COMPUTER_SCIENCE_2007
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_COMPUTER_SCIENCE_2008
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_COMPUTER_SCIENCE_2009
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_MATHEMATICS_2005
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_MATHEMATICS_2006
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_MATHEMATICS_2007
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_MATHEMATICS_2008
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_PHYSICS_2005
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_PHYSICS_2006
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_PHYSICS_2007
- SPRINGER_LINK_BOOKS_LECTURE_NOTES_IN_PHYSICS_2008
- SPRINGER_LINK_BOOKS_MATHEMATICS_AND_STATISTICS_WITHOUT_LECTURE_NOTES_2005
- SPRINGER_LINK_BOOKS_MATHEMATICS_AND_STATISTICS_WITHOUT_LECTURE_NOTES_2006
- SPRINGER_LINK_BOOKS_MATHEMATICS_AND_STATISTICS_WITHOUT_LECTURE_NOTES_2007



- SPRINGER_LINK_BOOKS_MATHEMATICS_AND_STATISTICS_WITHOUT_LECTURE_NOTES_2008
- SPRINGER_LINK_BOOKS_MEDICINE_2005
- SPRINGER_LINK_BOOKS_MEDICINE_2006
- SPRINGER_LINK_BOOKS_MEDICINE_2007
- SPRINGER_LINK_BOOKS_MEDICINE_2008
- SPRINGER_LINK_BOOKS_NONSERIES_PRE2005
- SPRINGER_LINK_BOOKS_PHYSICS_AND_ASTRONOMY_WITHOUT_LECTURE_NOTES_2005
- SPRINGER_LINK_BOOKS_PHYSICS_AND_ASTRONOMY_WITHOUT_LECTURE_NOTES_2006
- SPRINGER_LINK_BOOKS_PHYSICS_AND_ASTRONOMY_WITHOUT_LECTURE_NOTES_2007
- SPRINGER_LINK_BOOKS_PHYSICS_AND_ASTRONOMY_WITHOUT_LECTURE_NOTES_2008
- SPRINGER_LINK_BOOKS_PROFESSIONAL_AND_APPLIED_COMPUTING_2005
- SPRINGER_LINK_BOOKS_PROFESSIONAL_AND_APPLIED_COMPUTING_2006
- SPRINGER_LINK_BOOKS_PROFESSIONAL_AND_APPLIED_COMPUTING_2007
- SPRINGER_LINK_BOOKS_PROFESSIONAL_AND_APPLIED_COMPUTING_2008
- SPRINGER_LINK_JOURNALS_STANDARD
- SPRINGER_LINK_ONLINE_JOURNALS_ARCHIVE_COMPLETE
- TAYLOR_FRANCIS_ONLINE_COMPLETE
- WILEY_ONLINE_LIBRARY_FULL COLLECTION
- WILEY_ONLINE_OPEN ACCESS & FREE TITLES



ANNEX D

List of current b-on members (66 members):

<i>Institution code</i>	<i>Institution name</i>
00100	Universidade dos Açores
00200	Universidade do Algarve
00300	Universidade de Aveiro
00400	Universidade da Beira Interior
00500	Universidade de Coimbra
00600	Universidade de Évora
00700	Universidade de Lisboa
00900	Universidade Nova de Lisboa
01000	Universidade do Minho
01100	Universidade do Porto
01200	Universidade de Trás-os-Montes e Alto Douro
01300	ISCTE-IUL - Instituto Universitário de Lisboa
01400	Universidade da Madeira
01500	Universidade Aberta
01600	Universidade Católica Portuguesa
01800	Universidade Fernando Pessoa
01900	CESPU - Cooperativa De Ensino Superior Politécnico e Universitário, C.R.L.
02000	Egas Moniz - Cooperativa de Ensino Superior, C.R.L.
02100	Universidade Autónoma de Lisboa
02400	Fundação Minerva - Cultura - Ensino e Investigação Científica (Universidade Lusíada)
02500	Universidade Portucalense Infante D. Henrique
02600	ENSILIS - Educação e Formação, Unipessoal, Lda.
02700	Instituto Universitário Militar (IUM)
02800	Universidade Lusófona de Humanidades e Tecnologias
10200	Escola Superior de Enfermagem do Porto
10400	Escola Superior de Hotelaria e Turismo do Estoril (ESHTE)
10700	Maiêutica – Cooperativa de Ensino Superior, C.R.L.
10800	Instituto Politécnico de Beja
10900	Instituto Politécnico de Bragança
11000	Instituto Politécnico de Castelo Branco
11100	Instituto Politécnico de Coimbra
11200	Instituto Politécnico de Leiria
11300	Instituto Politécnico de Lisboa
11400	Instituto Politécnico de Portalegre
11500	Instituto Politécnico de Santarém
11600	Instituto Politécnico de Setúbal



11700	Instituto Politécnico de Viseu
11800	Instituto Politécnico do Cávado e do Ave
11900	Instituto Politécnico do Porto
12000	ISPA - Instituto Universitário de Ciências Psicológicas, Sociais e da Vida
12100	Instituto Politécnico de Viana do Castelo
12200	Escola Superior de Enfermagem de Lisboa
12300	Instituto Politécnico da Guarda
12400	Instituto Politécnico de Tomar
12500	Escola Superior Náutica Infante D. Henrique
12600	Escola Superior de Enfermagem de Coimbra
20400	Laboratório Nacional de Energia e Geologia, I.P.
20500	Laboratório Nacional de Engenharia Civil, I.P.
20700	Instituto Nacional de Saúde Dr. Ricardo Jorge
20800	Gulbenkian Institute for Molecular Medicine
21200	INESC TEC - Instituto de Engenharia de Sistemas e Computadores, Tecnologia e Ciência
21500	Instituto Nacional de Medicina Legal e Ciências Forenses, I.P.
21700	INL - International Iberian Nanotechnology Laboratory
21900	Instituto Português do Mar e da Atmosfera, I.P.
30300	INFARMED - Autoridade Nacional do Medicamento e Produtos de Saúde, I.P.
31400	Banco de Portugal
31500	Instituto Português do Sangue e da Transplantação, I.P.
40400	SCML-Santa Casa da Misericórdia de Lisboa
40500	Fundação D. Anna de Sommer Champalimaud e Dr. Carlos Montez Champalimaud
40600	ARDITI - Agência Regional para o Desenvolvimento da Investigação, Tecnologia e Inovação
50100	Unidade Local de Saúde de Amadora/Sintra, E.P.E.
50400	Unidade Local de Saúde de Santo António, E.P.E.
50700	Unidade Local de Saúde de Coimbra, E.P.E.
51000	Unidade Local de Saúde de São José, E.P.E.
51200	Unidade Local de Saúde de Viseu Dão-Lafões, E.P.E.
51300	Unidade Local de Saúde do Estuário do Tejo, E.P.E.





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