

Call for Proposals

This call for proposals is jointly commissioned by DFFU, the Danish Research Library Association, and LIBER, the Association of European Research Libraries (hereafter Commissioners), to find a competent consultant agency (hereafter Consultant) for conducting a study titled:

Public-Private Partnerships and Collaborations in the Context of Library Technology: A Landscape Analysis in Denmark 2023

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1. Context and objectives

Description of Commissioners

The Danish Research Library Association DFFU (Danske Fag-, Forsknings- og Uddannelsesbiblioteker) is a joint organisation for research-, academic- and educational-libraries in Denmark and their employees. The association promotes initiatives for the benefit of the academic and research libraries and the collective library system. It is a forum for consideration and discussions on library issues and politics.

LIBER (Ligue des Bibliothèques Européennes de Recherche) is the voice of Europe's research library community. Its mission is to provide an information infrastructure enabling world-class research at LIBER Institutions. The organisation promotes and advocates for European libraries in all European and national fora where the voice of LIBER needs to be heard.

Background

Library operations build on diverse technologies and technological products, ranging from library management systems, indexing and discovery tools to digital repositories and archives as well as publication platforms. In Denmark, the most used library systems platform is the commercial ExLibris product Primo/Alma and all universities and educational libraries use the commercial CRIS/RIMS named Pure from Elsevier. With research data management (RDM), the first steps towards a national solution based on the open source solution Dataverse from Harvard University are under construction. However, the assumption is that Danish research, academic and educational libraries primarily use commercial solutions for library operations.

At the same time, libraries' existing services and practices are challenged by the rapid emergence of digital innovations and increasing automation. These changes in the technological landscape may also offer new opportunities and roles for libraries. Therefore the Commissioners' strategic goal is to help their member libraries better address this new era by taking a proactive part in the transformation and building state-of-the-art services for their patrons. Instrumental for achieving this goal can be successful and sustainable public-private partnerships and collaborations with library technology providers.

For these reasons, the Commissioners are launching this study, which an external consultant agency will execute.

Objectives

The main objective of the tendered study is to map the landscape to understand better where library technology (see Appendix 3 for definition) is developed, acquired, implemented, and used. The focus should be on partnerships (see Appendix 3 for definition) and collaborations that libraries build with commercial and non-commercial suppliers of

library technology. An understanding of the formal and informal aspects of current public-private partnerships and collaborations can be used to inform future directions for the members of DFFU and LIBER.

Based on an overview of current solutions and relations in one European country, Denmark, the study should analyse the aspects that can influence the libraries' role in this landscape in the future. Special attention should be paid to emerging and innovative technologies, such as machine learning (ML), image or natural language processing and other implementations of Artificial Intelligence (AI), as well as robotics, virtual reality / augmented reality (VR/AR), in the context of research libraries and their services. The results from Denmark are expected to be transferable to other European countries.

The study should address the following questions:

1. What systems and technologies are used in Danish libraries?

The objective is to build an overview of currently used technologies in target libraries. This information aims to inspire library technology and competence development at the local, national, and European levels. The purpose is not to emphasise any specific technology or build a comprehensive analysis of available technology but to show how libraries and technology providers can work together to identify, develop, and implement new and innovative technologies that benefit the community.

2. What are the characteristics of the current partnerships and collaborations?

The objective is to analyse partnerships and collaborations between Danish libraries and technology companies from 2019 until today, focusing on those that involve new and innovative technologies. The study should identify success stories, collect lessons learned from failures, and detect opportunities for improvement. It should also look at the contractual boundaries and enablers of these partnerships and collaborations to see how the role of the library is defined. If detected, the relation's intensity may reveal important aspects of the potentiality to change.

3. Who are the key actors and stakeholders in the field?

The objective is to identify key stakeholders and their roles, such as library leadership, university representatives, technology vendors, researchers, students and other user groups, and gather data on their needs and priorities related to new and innovative technologies.

4. What is the impact of partnerships and collaborations on libraries and their services?

The objective is to investigate the benefits and potential disadvantages for the individual library or the library community in partnership or collaboration.

5. What are the future challenges and opportunities for research libraries?

The objective is to recognise the phenomena that stand out as sources of revolutionary transformation locally and internationally. The purpose is to gain knowledge for building future competencies and strategies.

Scope

The scope of the study covers 43 Danish libraries: eight universities, seven university colleges and a selection of smaller research and educational libraries. (See Appendix 1: Target libraries in Denmark.) However, the analysis should focus on the libraries that have partnerships.

The study is estimated to take approximately 30 work days, and the results should be delivered by the end of 2023.

Exclusions:

- The study must not address analogue technologies in the library landscape, such as catalogue cards.
- The study must not address technology used for administrative operations in libraries, such as office systems, HR systems, finances, etc.
- The study must not target public libraries.

2. Description of the Assignment

Basic requirements

To contribute to the previously described objectives, the Consultant will conduct a study and deliver the results that meet the requirements of this document. The assignment details can be further defined in a project plan that must be approved by the Commissioners' and Consultant's representatives.

Basic requirements of the assignment:

- **Target population:** The study's scope covers 43 Danish libraries listed in Appendix 1. The Commissioners will provide the necessary information to contact these libraries, while the Consultant is responsible for planning the most efficient and relevant methods to reach these libraries and their representatives.
- **Language:** The Consultant must be able to communicate with the target libraries and their informants in some Scandinavian language.
- **Schedule:** The results of the study should be delivered before the end of the year 2023. However, the commission's closure (e.g., the distribution of results to Commissioners' communities) can extend to 2024. A preliminary schedule of the study is in Appendix 2.

- **Format of deliverables:** The Commissioners encourage the Commissioner to deliver the results in the most comprehensible and interesting format possible. For example, the interim and final reports can be in the format of a slide presentation.
- **Project management:** The Consultant is responsible for the project management tasks, including creating and updating the execution plan, organising the project meetings, and reporting and delivering project outcomes (see also section Deliverables).
- **Communication:** The Consultant provides the communication channels that ensure efficient and timely communication between its project team and the Advisory Board of the Commissioner.

Note that this study is subject to the limits and precautions related to the responsible conduct of research, such as personal data protection and copyright, the General Data Protection Regulation (GDPR) and other legal obligations in the European Union.

Deliverables

1. A landscape study

The Consultant will conduct a once-off, possibly reproducible study that builds an overview of the current situation in Danish research libraries and detects the trends towards the future.

The Consultant is responsible for the design and execution of the study, including

- the choice of methods (e.g., survey and interviews) and core indicators,
- responsible conduct of research,
- data collection and analysis,
- anonymisation and other responsible management of data,
- Interim and end reporting to the Commissioner,
- delivery of results.

The Commissioner provides the Consultant with the necessary information, for example, for contacting the target libraries.

Special attention should be paid to all topics listed in the section Additional Requirements of this document as they provide an essential basis for the study and information with which to build and address relevant issues.

2. Recommendations

Based on the analysis of collected data, the Consultant will compose a list of recommendations that reflects the results of the study and guides research libraries towards sustainable partnerships and collaborations in the future. The Consultant is requested to create the recommendations in collaboration with the Commissioners' Advisory Committee.

The recommendations should address the following themes:

1. A relevant role for libraries in future partnerships and collaborations with technology providers.

The aim is to identify preferable modes of partnership and collaboration rather than recommend individual technology providers or contract types.

2. Indicators of successful and sustainable partnerships and collaborations.

The aim is to develop a set of criteria for evaluating potential partnerships and collaborations, considering factors such as compatibility, resources, and goals, as well as the potential for leveraging new and innovative technologies and the transformative potential for the community.

The recommendations may include anecdotal data, case examples and good practices detected on the field.

Schedule

The Consultant's assignment will begin with a written agreement and end with Commissioner's acceptance. The Consultant is requested to organise regular meetings and provide interim reports/updates on the progress of the study to the Commissioners. Furthermore, the Consultant is requested to disseminate results already during the project (e.g. blog post, partial results) according to the agreed execution plan. A preliminary schedule is available in Appendix 2.

Additional Requirements

The expected deliverables will:

- Consist of a complete report of results in English;
- Include an executive summary in English;
- Apply a Creative Commons Attribution (CC-BY) licence for all deliverables, data and analysis;
- Provide a handover of all the datasets collected with an explanation of the statistical instruments used (preferably an open source notebook, e.g. Jupyter or R Quarto / Markdown);
- Ensure the reproducibility of data processing for possible updates by Commissioners, who have full access to the data, processing, and analyses conducted.

Complementary approaches or suggestions for innovative approaches are welcome.

3. Proposal submission and selection process

Submitting the proposal

Candidates are encouraged to compose their proposals in a format and style that reflects the intended reports and deliverables.

The proposal should combine the following:

- Rewriting the objectives of the study as the candidate would have understood it;
- A description of proposed **deliverables** compatible with the requirements specified;
- A description of work **methodology**, including an explanation of quantitative and qualitative elements;
- A more detailed **timeline** for carrying out the study, compatible with the requirements specified;
- A detailed **financial proposal in Euros**, at a fixed price, and all taxes and charges included;
- A description of relevant experience of similar projects and a list of recent **references** justifying the candidate's expertise concerning the field and subject of this study;
- A statement of alignment with the General Data Protection Regulation and other legal obligations, national or international.

The candidates are free to provide any other document they deem necessary. Applications must be written in English.

Proposals submission process:

- The proposal document and its appendices have to be deposited via email to the address: **sekretariat@dfdf.dk**
- It will be possible for the candidates to ask questions directly in the same email.
- Answers will be given in a separate Q&A session online, where candidates may also hear more details about the project.

Activity	Date
Send Request for Proposals	9.–10.3.2023
Deadline for asking questions	Monday 20.3.2023
Online Q&A session	Wednesday 22.3.2023
Deadline for submitting proposals (offer)	Tuesday 11.4.2023
Review of proposals	12.–26.4.2023
Communication of the decision	By 5.5.2023
Meeting with chosen Consultant/ Commencement date of the agreement	By the end of May 2023

Execution plan	June 2023
Execution of the study	June 2023 - February/March 2024
Dissemination of study results	December 2023 - March 2024

Candidate evaluation and selection

The winner of the Call for Proposals will be chosen based on the evaluation of the proposal document and its appendices in response to the above specifications.

All proposal documents are of value when the winner of the call is selected. If necessary, some details and specifications may be adapted by mutual agreement.

Evaluation criteria

The successful proposal will be selected based on the following criteria:

- **Methodology:** The proposal should outline a clear and well-designed methodology for conducting the study, including data collection and analysis methods, as well as any limitations. (Weighting: 30%)
- **Experience:** The proposal should demonstrate the *proposer's* relevant experience and expertise, including their knowledge of the library and technology fields. (Weighting: 20%)
- **Relevance:** The proposal should demonstrate how the proposed research aligns with the study's objectives and the larger context of partnerships and collaborations between libraries and technology companies, and new and innovative technologies. (Weighting: 20%)
- **Feasibility:** The proposal should provide a realistic and detailed plan for completing the study within the given timeframe and budget, including a plan for data collection, analysis, and presentation of findings. (Weighting: 30%)

4. Confidentiality

All phases, materials, outcomes and modes of working in this project should be as open as possible. This commitment and necessary deviations to it will be included in the contract to be signed by both parties. However, it is up to DFFU and LIBER to determine whether and, if so, how they wish to disseminate all or part of the contents of the study.

5. Other conditions

1. The candidate cannot derive any rights to reimbursement of quotation costs or obtaining the order from this Request for Proposals.



2. DFFU and LIBER may (temporarily) suspend and/or revoke this Request for Proposals. In such a situation, candidates or their stakeholders are not entitled to reimbursement of the costs incurred for this Request for Proposals.
3. By submitting a Proposal, a candidate declares that they meet all the requirements set out in this Request for Proposals and that they agree to the terms and conditions set.
4. General conditions of sale, sector conditions or other conditions of the candidate are expressly excluded and do not apply to this agreement.

DFFU and LIBER reserve the right to change the proposed schedule. If DFFU and LIBER proceed to change the intended schedule, this will be communicated to all parties concerned. Tenderers cannot derive any rights from this intended schedule. The dates mentioned in this (or the amended) schedule for the submission of questions and the submission of proposals are regarded as deadlines.

Appendix 1: Target libraries in Denmark

Arbejderbevægelsens Bibliotek og Arkiv
Arkitektskolen i Århus
Biblioteket for Arkitektur, Design, Konservering og Scenekunst
CBS Bibliotek
Cphbusiness City
Danish Meat Research Institute, Teknologisk Institut
Danmarks Statistiks Bibliotek
Designmuseum Danmark Bibliotek
Det Danske Filmmuseum Bibliotek
Det Jydske Musikkonservatorium
Det Kongelige Bibliotek
Det Kongelige Danske Musikkonservatorium
DIIS Library
DTU Bibliotek
Erhvervsakademi Århus, Biblioteket
Fagbiblioteket, Hospitalsenhed Midt, Viborg
Folketingets Bibliotek
Forsvarsakademiets Videntcenter
Forsvarsministeriets Materiel- og Indkøbsstyrelse
Glostrup Hospital, Medicinsk Bibliotek
Hillerød Hospital, Sundhedsvidenskabeligt Bibliotek
IBA Erhvervsakademi Kolding, Biblioteket
KEA Biblioteket
Kriminalforsorgens Uddannelsescenter
Københavns Professionshøjskole, Biblioteket
Medicinsk Bibliotek, Sydvestjysk Sygehus
Medicinsk Bibliotek, Aalborg Universitetshospital
Musikhistorisk Museum & Carl Claudius' Samling
NIAS Library and Information Centre
NOTA
Nunatta Atuagaategarfia
Professionshøjskole Absalon, Biblioteket
Professionshøjskolen University College Nordjylland, Biblioteket
Professionshøjskolen University College Syd, Biblioteket
Region Sjællands Fagbibliotek, VID
Rigshospitalet, Medicinsk Bibliotek
SIMAC. Open Learning Centre
Sundhedsstyrelsens Bibliotek
Syddansk Universitetsbibliotek
UCL Erhvervsakademi og Professionshøjskole, Biblioteket
VIA Bibliotekerne
VIVE Bibliotek
Aalborg Universitetsbibliotek

Appendix 2: Preliminary plan of project phases and timing

Phase 1: Initiation (Done)

Goals: Allocate the project resources; Define the project organisation for DFFU-LIBER collaboration.

Actors: DFFU & LIBER

Time: Q2–Q4/2022

Phase 2: Planning

Goals: Define the overall project plan (excl. the execution plan); Launch the Call for Proposals; Preliminary engagement of target libraries in Denmark.

Actors: DFFU & LIBER

Time: Q2/2022–Q2/2023

Phase 3: Execution

Goals: Compose the execution plan; Conduct the study; Compose the recommendations document.

Actors: **Consultant**, in the supervision of the Advisory Committee consisting of representatives of DFFU and LIBER

Time: Plan Q2/2023

Landscape study Q2–Q4/2023

Recommendations Q4/2023–Q1/2024

Phase 4: Closure

Goals: Report by the external partner; Distribution of results to the stakeholder communities of DFFU & LIBER; Evaluation of the project.

Actors: External research agency, DFFU & LIBER

Time: Q4/2023–Q1/2024

Appendix 3: Some definitions

Library technology

The term refers to digital technologies developed for and/or used in libraries to manage their core operations and provide services for their patrons. For example, libraries use various systems for managing library catalogues, metadata, human and other resources, material acquisition, or research data. Also, they need multiple systems to provide discovery services, electronic materials, reference services, education, etc., for their patrons.

Partnership

The term refers to a contractual relationship between a library and a library technology provider, who can be a private-sector vendor or a public authority providing similar services. The contract may be an outcome of a procurement process or based on other types of contacts and negotiations.