

# Maintenance and evolution of the ESPD EDM

*Publications Office – C.3*

## ESPD Meeting OP-GROW with Open User Community (OUC)

9<sup>th</sup> July 2020



Publications Office



an NTT DATA Company

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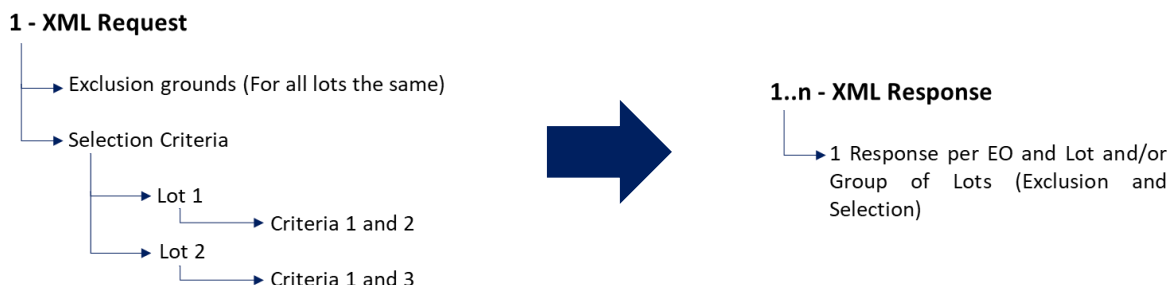
- #249: missing initial "yes/no" answer for all selection criterion @ Section B and C of Part IV - continuation of the discussion.
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# 1. Summary of last meeting on 17 June 2020

- ❖ Meeting minutes: [https://github.com/ESPD/ESPD-EDM/blob/wgm-reports/ESPD\\_Minutes\\_OUC\\_Meetings\\_20200617\\_v1.0.pdf](https://github.com/ESPD/ESPD-EDM/blob/wgm-reports/ESPD_Minutes_OUC_Meetings_20200617_v1.0.pdf)

- ❖ **Lots management:**



- ❖ **GitHub issues – Information:**

- #242: criteria 7 and 8 – inconsistencies with Regulation
- #243: criteria 9, 10, 11, 24 – unnecessary text field
- #260 to #264: ProcedureType
- #265: PropertyDataType in criterion 30
- #267: criteria 37, 38, 39 – cardinality of references
- #270: criterion 36 extended – element code

- ❖ **GitHub issues – Consultation:**

- #202: update criterion 33 – set up of economic operator: remove criterion 33 and include it as sub-criterion of general and specific turnover criteria.

## 2. GitHub Issues – Consultation (#249)

1/3

- ❖ **Issue #249 EO Response:** No initial “yes/no” answer for all selection criterion at Section B and C of Part IV:

CRITERION.SELECTION.ECONOMIC\_FINANCIAL\_STANDING.\*  
CRITERION.SELECTION.TECHNICAL\_PROFESSIONAL\_ABILITY.\*

- ❖ **Summary:** Currently Selection Criteria in Section A have an initial “yes/no” to indicate whether the EO fulfils the Selection Criteria or not. It should be possible to add the yes or no for all selection criteria in sections B and C.

Section A: CRITERION.SELECTION.SUITABILITY.\* contains this first question:

{QUESTION_SUBGROUP		1..n	6cce6b8e-c5	ON*
{QUESTION}	Your Answer true	1	INDICATOR	
{QUESTION_SUBGROUP		0..1	70d5bbcf-05	ONTRUE
{QUESTION}	Registration n [Reasons]	0..1	DESCRIPTION	
QUESTION_SUBGROUP				
{QUESTION_SUBGROUP		0..1	3a4a5421-8	ONFALSE
{QUESTION}	Reasons why [Reasons]	1	DESCRIPTION	
QUESTION_SUBGROUP				
{QUESTION_SUBGROUP		1	7458d42a-e1	ON*
{QUESTION}	Is this information true	1	INDICATOR	
{QUESTION_SUBGROUP		0..1	41dd2e9b-1	ONTRUE
{QUESTION}	Evidence Supp EVIDENCE-IE	1..n	EVIDENCE_IDENTIFIER	
QUESTION_SUBGROUP				
QUESTION_SUBGROUP				

- ❖ **List of criteria:** all selection criteria.

## 2. GitHub Issues – Consultation (#249)

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The overall purpose of the proposed changes under the scope of the issue 249 are the following:

- ❖ Support the supplier on the understanding of the requirements, whether fulfils the selection criteria or not.
- ❖ Support the CA on the simplification and automatisation of data processing.

## 2. GitHub Issues – Consultation (#249)

3/3

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### 1<sup>st</sup> option:

- Question 1: yes / no
- Question 2: in the case of yes, relied upon yes (and name of the Company) / no

#### Implications:

- Keep using Booleans.
  - Add a new sub-question to indicate if the criteria is relied upon or not.
  - Add the identifier of the organisation that is relied upon.
  - Include the evidence to the criterion #60 (CRITERION.OTHER.EO\_DATA.RELIES\_ON\_OTHER\_CAPACITIES), to enhance the automatization of the CA data processing.
- 

### 2<sup>nd</sup> option:

- Question 1: yes / no
- Question 2: in the case of no, but relied upon yes (and name of the Company) / no

#### Implications:

- Same as 1<sup>st</sup> option.
- 

### 3<sup>rd</sup> option:

- Question 1: fulfilled by tenderer / fulfilled by relied upon organisation / no

#### Implications:

- Implies the change of PropertyDataType from Boolean to another PropertyDataType (ad hoc).
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## 2. GitHub Issues – Information (#140)

1/1

❖ **Issue [#140](#):** Lots need for multiple identifiers:

❖ **Summary:**

- The possibility to include multiple identifiers per lot, in order to allow CA and MS to track the identifiers at national level.

❖ **Action:**

- It was proposed to OASIS committee ([UBL-176](#)) the possibility to add an extra ID component to lots (UBL 2.3). The changes was rejected and they proposed to add extensions for this purpose.
- Therefore, the proposed solution is to add an extension to specify another ID using UBL 2.3.

## 2. GitHub Issues – Consultation (#250)

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❖ **Issue [#250](#):** Criterion #59 roles:

❖ **Summary:**

- The issue is focused to discuss the current codes that are included within the EO Role Type, to better represent the concepts involved in the ESPD.

❖ **Proposed solutions:**

- Taking into account that finally ePO Ontology will use the ESPD EO Role Type, ESPD would continue using the current code list.
- Sole Contractor should be changed to Sole Tenderer, to represent better the role of the EO in ESPD's context.
- Group Member is considering Group of EO and Consortium. In the ESPD Regulation, there is no specific nomenclature for the group of economic operators. Therefore, it is a Role for an EO.
  - (2) **Sole Tenderer** - ST
  - (3) Lead Entity - LE
  - (4) Group member - GM
  - (5) Other entity (relied upon) - OERON
  - (6) Other entity (not relied upon) - OENRON



## 2. GitHub Issues – Information (#266)

1/1

❖ **Issue #266:** New criteria in extended 2.1.1 taxonomy.

❖ **Summary:**

- The issue aimed to clarify where the new criteria added in the current version of the ESPD could be included. In the issue the proposal was within the PART II, section A of the ESPD (Economic Operator Information).

### #66 CRITERION.DEFENCE.SELECTION.OTHER

		Name	Description	Value	exar	Cardinality	Property	D	Element	UI	Element	C	Code List	Comment				
66	{CRITERION	Supplement	Regarding procurement procedures regulated by the 2009/81/EC Directive, does the Economic Operator add any supplementary evidence that may be required?															
	{QUESTION_GROUP																	

### #67 CRITERION.UTILITIES.SELECTION.OTHER

		Name	Description	Value	exar	Cardinality	Property	D	Element	UI	Element	C	Code List	Comment				
67	{CRITERION	Supplement	Regarding procurement procedures regulated by the 2004/17/EC Directive, does the Economic Operator add any supplementary evidence that may be required?															
	{QUESTION_GROUP																	

- ❖ **Proposed solution:** ESPD is not Split by Directive, therefore the criteria should be removed from the taxonomy.
- ❖ **Implications:** There are no specific implications since both criteria have not been implemented even though they were added in the last version of the ESPD.

## 4. Next meetings

### ❖ Next meetings:

- Thursday 3<sup>rd</sup> September

### ❖ **Annual Seminar:** Thursday 1<sup>st</sup> October afternoon

