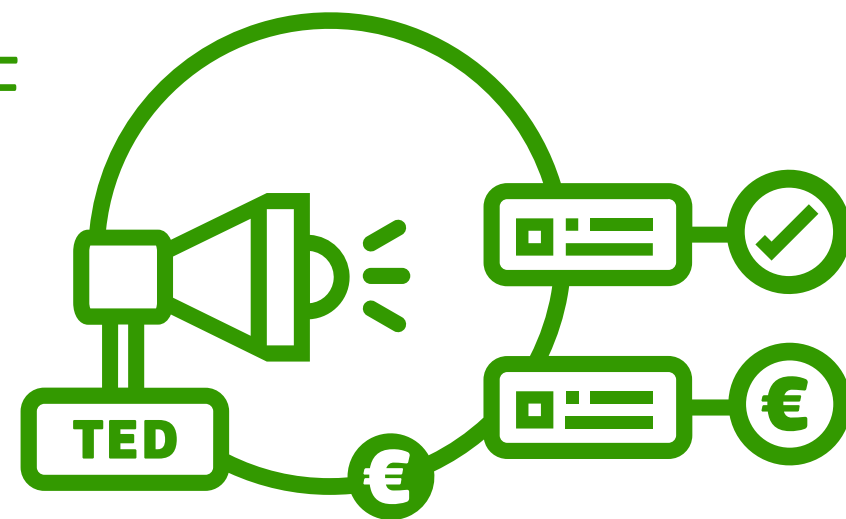


MAINTENANCE AND EVOLUTION OF THE ESPD EDM

Publications Office – C.3

ESPD OPEN USER COMMUNITY (OUC) MEETING

1st October 2024

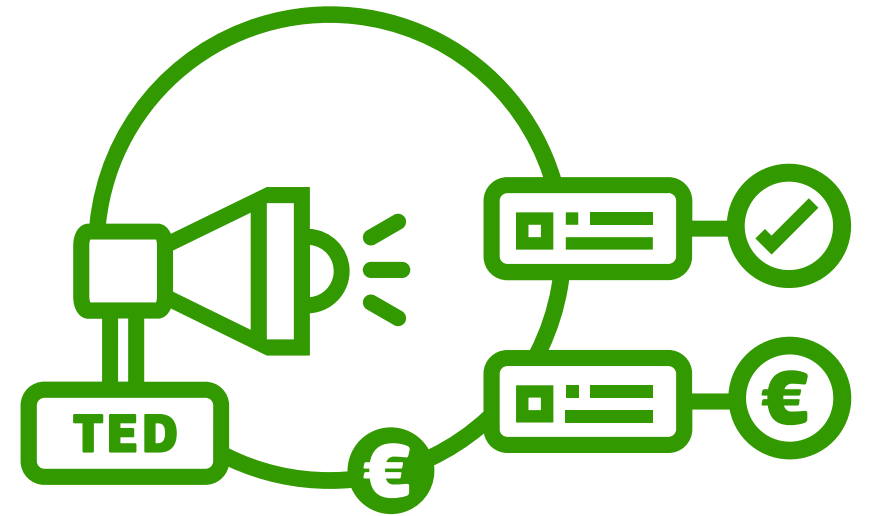




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of the European Union

Due to the Data Protection Regulation, your name will not be published in the list of attendees of the meeting if you have an objection.

Objections can be sent during this meeting to OPESPD@publications.europa.eu

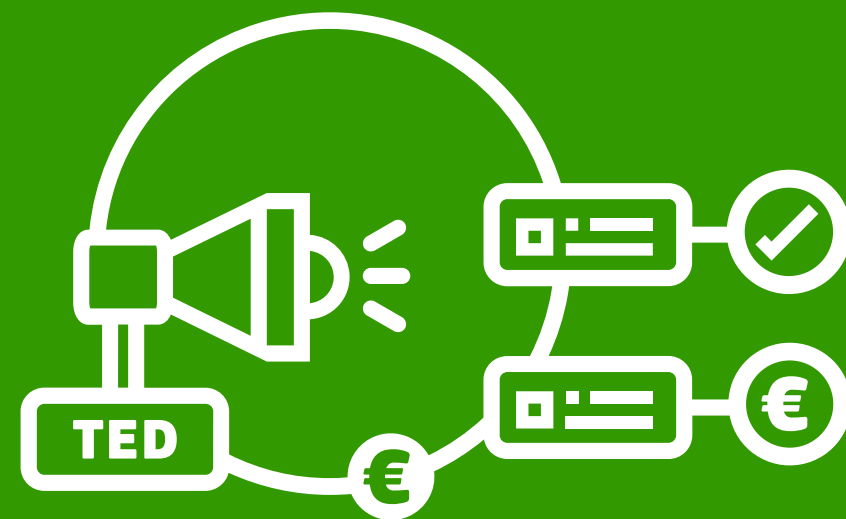




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 - Developer's tools in espd-tools branch
4. ESPD Demo – Interactive creation of examples v4
5. GitHub issues – closed
6. Next meetings



1. Summary OUC meeting on 27 June 2024

- Visualisation of criteria – interactive tool proposal
 - Exclusion Grounds*
 - Selection Criteria*
 - Interactive Form*
- Creation of examples – create your own xml examples
 - Request*
 - Response*
- Documentation – new design proposal
- eCertis planning – integration of eCertis, ESPD & eForms

<https://docs.ted.europa.eu/espd-wgm/monthly.html>

Open User Community
Documents

Upcoming Meeting Dates

Regular Meetings

Annual Seminars

Regular Meetings

2024

§ 2024-06-27

- 35th OUC Presentation
- 35th OUC Report

2024-04-24

- 34th OUC Presentation
- 34th OUC Report

2024-02-29

- 33rd OUC Presentation
- 33rd OUC Report

2. Documentation – a new UX Design

➤ Previous Design

ESPD EDM

- Home
- Business Handbook
- ▶ Technical Handbook
 - ESPD-EDM Conceptual Model HTML
- Release Notes
- Open User Community Documents

ESPD Exchange Data Model (ESPD-EDM)

v3.3.0

Resources

- [ESPD BUSINESS HANDBOOK](#)
- [ESPD TECHNICAL HANDBOOK](#) (last updated on 2024-02-15)
- [ESPD-EDM CONCEPTUAL MODEL HTML](#)
- [Release Notes](#)

2. Documentation – aligned with other TED Projects

➤ Current Design

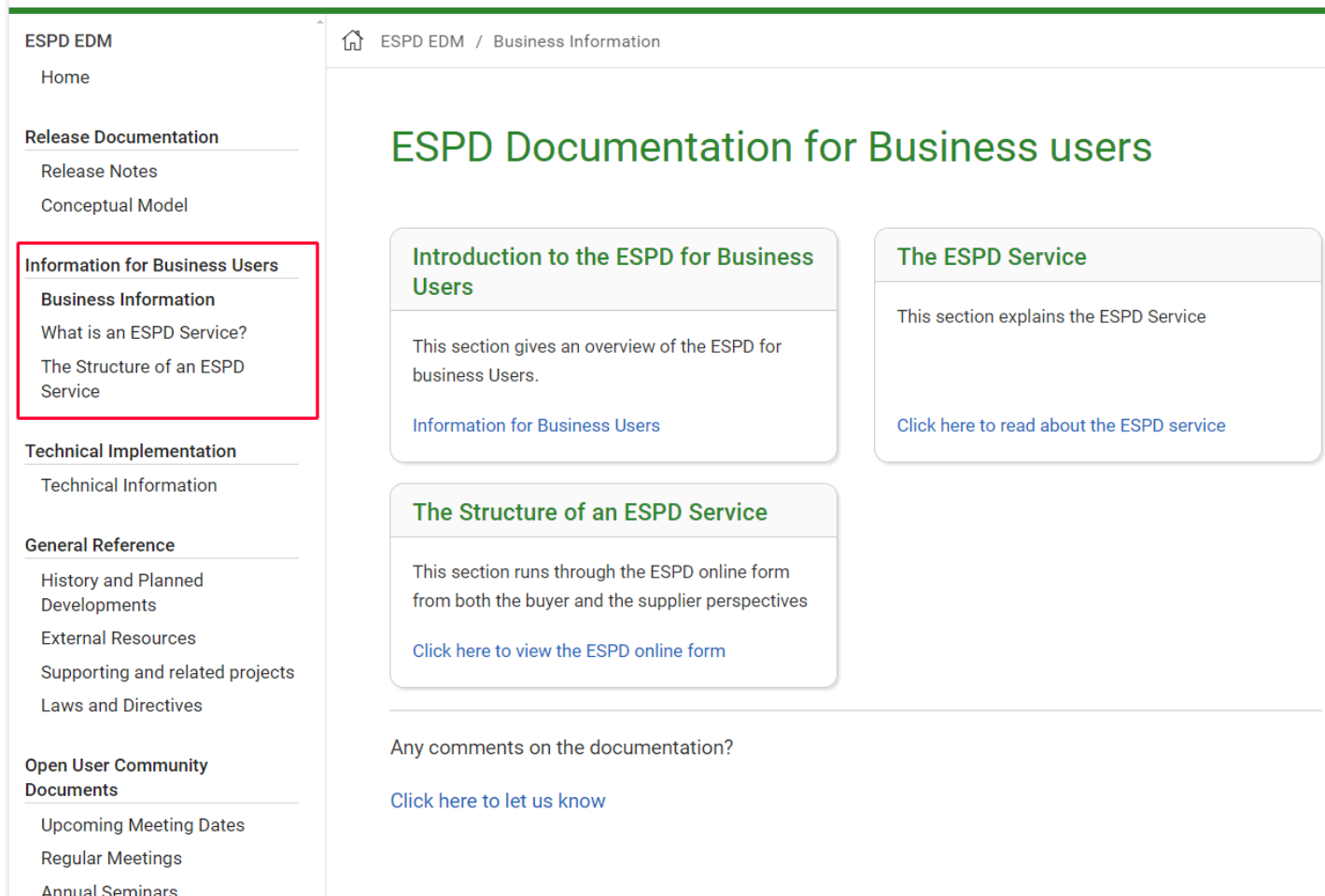
Key Points:

1. Home: ESPD Home
2. Release documentation: the releases - choose your release on the bottom left (Green Arrow)
3. Information for Business users
4. Technical Information
5. General Reference
6. Open User Community: meeting and seminar reports and documents

The screenshot shows the ESPD EDM website interface. On the left is a navigation menu with six main sections, each numbered with a red number: 1. ESPD EDM Home, 2. Release Documentation (containing Release Notes and Conceptual Model), 3. Information for Business Users (containing Business Information, What is an ESPD Service?, and The Structure of an ESPD Service), 4. Technical Implementation (containing Technical Information), 5. General Reference (containing History and Planned Developments, External Resources, Supporting and related projects, and Laws and Directives), and 6. Open User Community Documents (containing Upcoming Meeting Dates, Regular Meetings, and Annual Seminars). The main content area is titled 'ESPD Exchange Data Model (ESPD-EDM)' and contains introductory text about the ESPD and the ESPD-EDM. A 'Contents' sidebar on the right lists the same six sections. A green arrow points to the bottom left of the page, specifically to the 'Open User Community Documents' section in the navigation menu.

<https://docs.ted.europa.eu/espd-home/index.html>

2. Documentation – information for Business Users



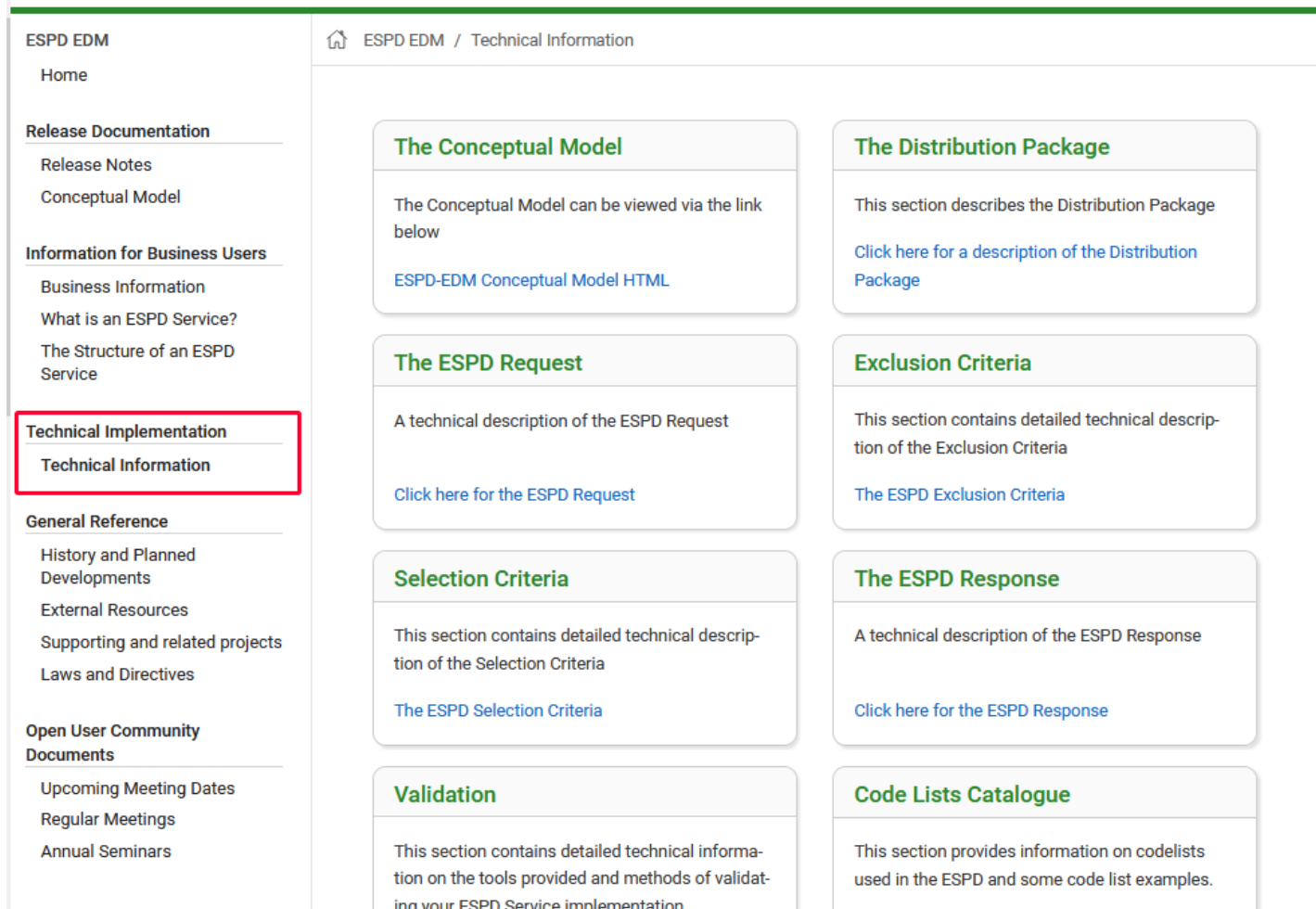
The screenshot shows the 'ESPD EDM / Business Information' page. The left sidebar contains a navigation menu with the following sections: 'Home', 'Release Documentation' (with sub-items 'Release Notes' and 'Conceptual Model'), 'Information for Business Users' (highlighted with a red box and containing 'Business Information' with sub-items 'What is an ESPD Service?' and 'The Structure of an ESPD Service'), 'Technical Implementation' (with sub-item 'Technical Information'), 'General Reference' (with sub-items 'History and Planned Developments', 'External Resources', 'Supporting and related projects', and 'Laws and Directives'), and 'Open User Community Documents' (with sub-items 'Upcoming Meeting Dates', 'Regular Meetings', and 'Annual Seminars'). The main content area is titled 'ESPD Documentation for Business users' and features three cards: 'Introduction to the ESPD for Business Users' (overview of ESPD for business users, with a link 'Information for Business Users'), 'The ESPD Service' (explains the ESPD Service, with a link 'Click here to read about the ESPD service'), and 'The Structure of an ESPD Service' (runs through the ESPD online form from both buyer and supplier perspectives, with a link 'Click here to view the ESPD online form'). At the bottom of the main area, there is a section for 'Any comments on the documentation?' with a link 'Click here to let us know'.

Key Points:

- Topics organised separately:
- An Introduction to the ESPD: background, legislation, roadmap
- What an ESPD Service is
- The structure of an example ESPD Service

<https://docs.ted.europa.eu/espd-home/index.html>

2. Documentation – information for Technical Users



The screenshot shows the 'ESPD EDM / Technical Information' page. The left sidebar contains a navigation menu with the following sections: 'Home', 'Release Documentation' (with sub-items 'Release Notes' and 'Conceptual Model'), 'Information for Business Users' (with sub-items 'Business Information', 'What is an ESPD Service?', and 'The Structure of an ESPD Service'), 'Technical Implementation' (with 'Technical Information' highlighted by a red box), 'General Reference' (with sub-items 'History and Planned Developments', 'External Resources', 'Supporting and related projects', and 'Laws and Directives'), and 'Open User Community Documents' (with sub-items 'Upcoming Meeting Dates', 'Regular Meetings', and 'Annual Seminars'). The main content area displays eight technical topics in a grid: 'The Conceptual Model' (with a link to 'ESPD-EDM Conceptual Model HTML'), 'The Distribution Package' (with a link to 'Click here for a description of the Distribution Package'), 'The ESPD Request' (with a link to 'Click here for the ESPD Request'), 'Exclusion Criteria' (with a link to 'The ESPD Exclusion Criteria'), 'Selection Criteria' (with a link to 'The ESPD Selection Criteria'), 'The ESPD Response' (with a link to 'Click here for the ESPD Response'), 'Validation' (describing tools and methods), and 'Code Lists Catalogue' (providing information on codelists).

Key Points:

- Topics are displayed discretely in order of usage - navigation is flexible and topics easily identifiable.
- Documentation includes the former annexes

<https://docs.ted.europa.eu/espd-home/index.html>

2. Documentation – OUC Meetings and Seminars

ESPD EDM

Home

Release Documentation

Release Notes

Conceptual Model

Information for Business Users

Business Information

What is an ESPD Service?

The Structure of an ESPD Service

Technical Implementation

Technical Information

General Reference

History and Planned Developments

External Resources

Supporting and related projects

Laws and Directives

Open User Community Documents

Upcoming Meeting Dates

Regular Meetings

Annual Seminars

ESPD EDM / Upcoming Meeting Dates

ESPD-EDM Open User Community Documents

This section contains the OUC Meeting Reports and Annual Seminar documents. All the documentation can be accessed by expanding the different options in the navigation menu on the left.

Next OUC meeting:

October 1st, 2024, 10.00-11.30

Next Annual Seminar:

December 3rd-4th, 2024, hybrid full day TED event

ESPD Open User Community Annual Seminar Documents

The cumulative annual reports are a collation of minutes from all the ePO related meetings in a year. Reports from the years 2019 to 2023 are currently available.

[Click here to access the annual seminar documents](#)

ESPD Open User Community Regular Meeting Documents

These reports contain the minutes from the general meetings, and outline project progress, changes implements since the last meeting, and future development plans for the next period.

[Click here to access the regular meeting documents](#)

Key Points:

- Scheduled meetings on the front page
- The OUC Annual Seminars
- The OUC Regular Meetings
- Information design makes it easier to navigate; the RH menu reorganised and more efficient

<https://docs.ted.europa.eu/espd-home/index.html>

2. Documentation – feedback on the Documentation

➤ GitHub template for comments on documentation

Report an error Collects errors detected in the documentation	Get started
Send a general comment Collects general comments about the documentation.	Get started
Suggest an improvement Collects suggestions on how we could improve the documentation	Get started

Don't see your issue here? [Open a blank issue.](#)

[Edit templates](#)

<https://docs.ted.europa.eu/espd-home/index.html>

2. Documentation – let's have a look online

The ESPD Docs

3. V4 available on-line

Feature	Change
UUIDS	XML Path like IDs replacing dynamic UUIDs in ESPD data structure elements
Lot management	Finetuning granularity of lot management to different requirements (applicable to group of lots)
Evidence group	Misplacement fixed
General data structure updates	<ul style="list-style-type: none">- Descriptive requirement added to Part IV (Selection criteria) – #388- Other economic or financial requirements Part B(6) – #388- Possibility to exclude Pre-qualification system section where it does not apply – #389
Code lists	<ul style="list-style-type: none">- General updates
Validation / Schematron	General updates – v4 available in Testbed
Conceptual model	Alignment with ePO model
GitHub folders	New folders and reorganisation
Online documentation	Updated – new structure
See details	https://github.com/OP-TED/ESPD-EDM/releases

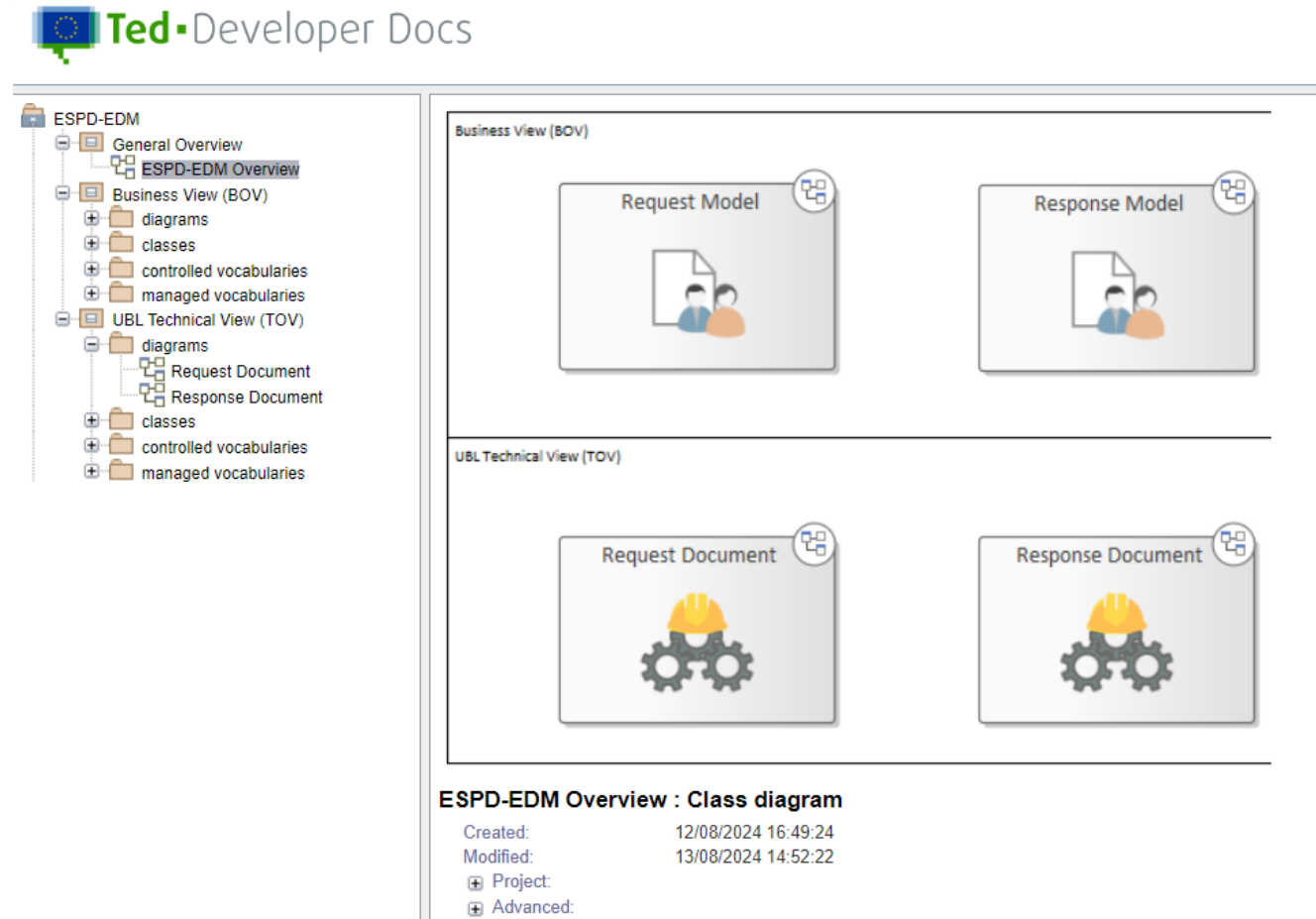
3. V4 available on-line

1. Alignment with ePO

- ✓ Classes and concepts

2. Organising the structure

- ✓ New User Experience
- ✓ Grouping of similar elements



https://docs.ted.europa.eu/ESPD-EDM/latest/_attachments/ESPD_CM_html/index.html

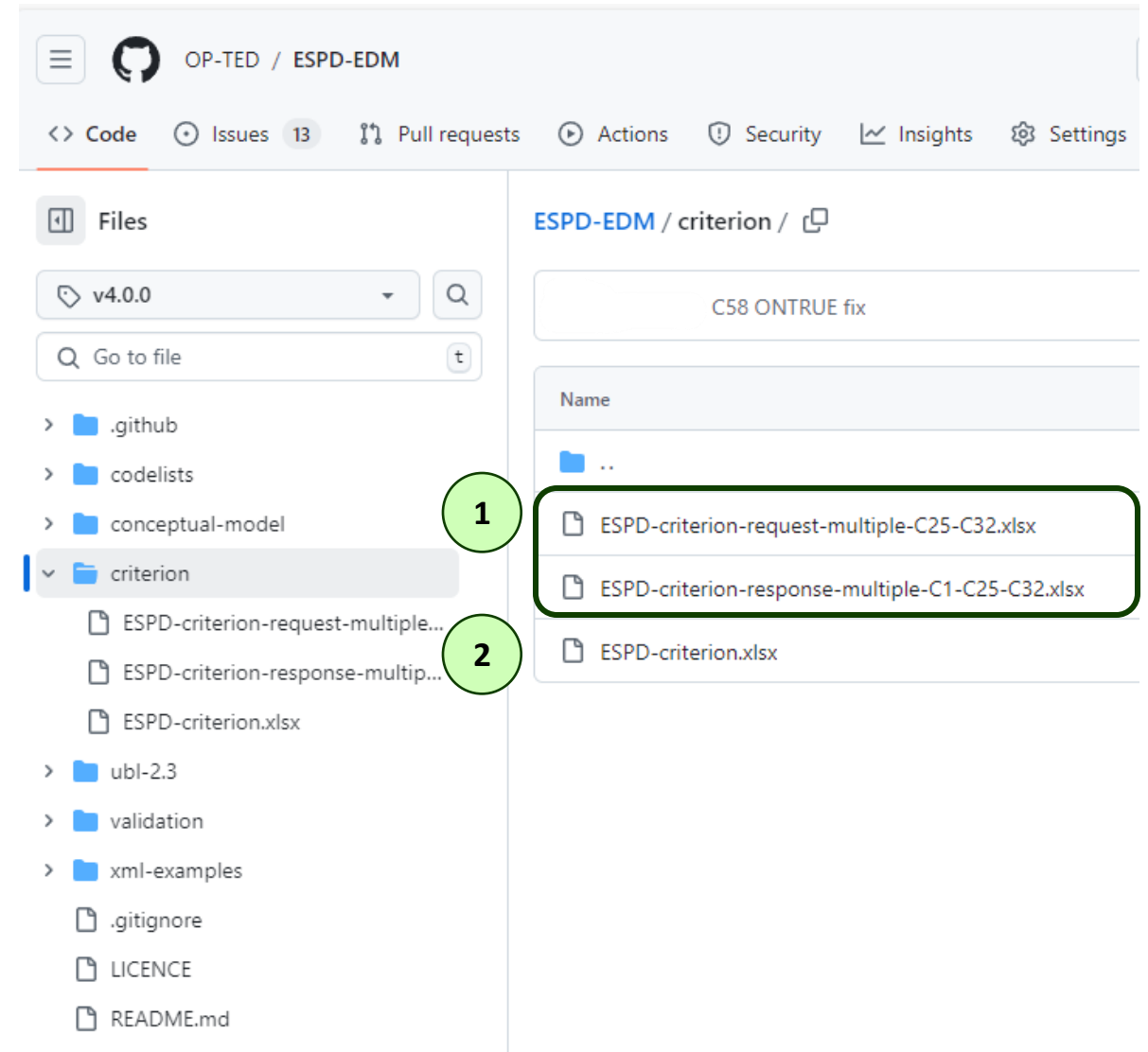
3. V4 available on-line

1. New Criterion Examples

- ✓ Request
- ✓ Response

2. Criterion

- ✓ new structure
- ✓ XML path-like IDs

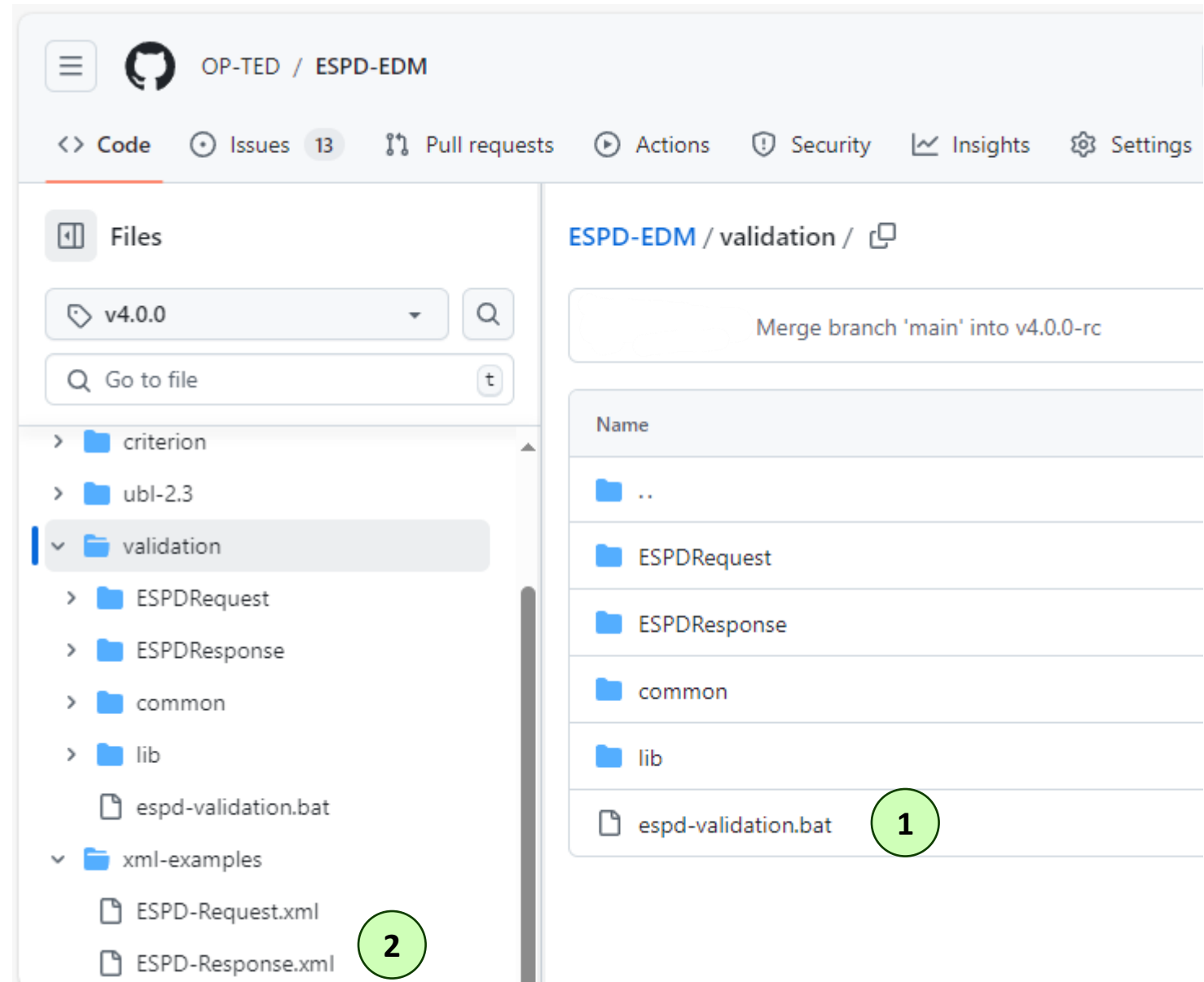


<https://github.com/OP-TED/ESPD-EDM/tree/v4.0.0/criterion>

3. V4 available on-line

➤ XML Validation tools

1. espd-validation.bat
2. ESPD-Request.xml
ESPD-Response.xml



<https://github.com/OP-TED/ESPD-EDM/tree/v4.0.0/validation>

3. V4 available on-line

➤ ESPD-EDM – espd-tools branch

1. Tools to process and transform Excel files (Criterion and Code Lists) to UBL and genericcode.
2. Transform Criterion Excel files to Web format.
3. Validate Criterion Excel v4.0.0
4. XSLT, VBA tools

<https://github.com/OP-TED/ESPD-EDM/tree/espd-tools>

➤ espd-validation-schematron

1. Schematron Business rules for ESPD validation
2. Useful tool for ESPD Service implementers

<https://github.com/OP-TED/espd-validation-schematron>

4. ESPD Demo - Interactive creation of examples v4

- Interactive creation of ESPD Request and ESPD Response
- Specific examples for CA and EO
- Playground before adoption and implementation
- Reference for testing and feedback

<https://docs.ted.europa.eu/espd-demo/>

The screenshot displays the 'ESPD Demo' web application. At the top, there is a header with the European Union flag and the text 'ESPD Demo'. Below the header is a navigation bar with links: 'Export', 'Code Lists', 'UUID', 'View', and 'Examples'. The main content area is titled 'ESPD Examples Generator' and includes a description: 'Select desired ESPD version and generate ESPD Request examples as Contracting Authority and ESPD Response examples Economic Operator.' Below this description are three buttons: 'Previous', '[Step: 0 / 4] ▶ Start', and 'Next'. The 'Start' button is highlighted. Under the 'Start' button, there is a section titled 'A. Select initial parameters'. This section contains three dropdown menus: 'ESPD version' (with 'v3.3.0' selected and 'v3.3.0' and 'v4.0.0' visible in the dropdown list), 'Select your role' (with 'European Union' selected), and 'Country' (with 'European Union' selected). Below each dropdown menu is a small text label: 'Select your role' and 'Select your country'.

5. ESPD - closed GitHub issues

Issue	Title of the issue	Scope
#420	Financial ratio type translations (bis?)	clarification
#419	ESPD Response v4.0.0-rc - UBL 2.3 structure	4.0.0
#418	Will the xsd files updated with version 2.4 for the new upcoming v.4.0.0 or will the version 2.3 be kept?	clarification
#416	Schematron rule (BR-TC-17-02) is incorrect	4.0.0
#415	General and Specific Turnover	clarification
#414	UBL-UnqualifiedDataTypes-2.2.xsd in ubl-2.3 directory	4.0.0
#412	ESPD Response requirements (ePO)	4.0.0
#411	cac:ResidenceAddress link to at-voc::country missing	4.0.0
#410	power of Attorney (definition ePO)	4.0.0
#409	typos in the UBL terms	4.0.0
#408	UBL term: cbc:CopyIndicator. A contradiction between the two definitions	4.0.0
#407	Provide a usecase for UBL term:PreviousVersionID	documentation

5. ESPD - closed GitHub issues

Issue	Title of the issue	Scope
#406	UBL terms: IssueDate and IssueTime. Should it be "issued" or "dispatched"?	clarification
#405	ExclusionGround are linked to the ProcurementProjectLot (ePO)	clarification
#404	ProcurementProjectLot Identifier duplication	4.0.0
#403	TemplateEvidence in the Request: survey issue	clarification
#402	Foreseen implementation of General Yearly Turnover Selection Criteria in ESPD-EDM version 3.3.0	4.0.0
#389	Pre qualification systems and classification of EOs	4.0.0
#388	Other economic or financial requirements	4.0.0
#382	Incomplete ESPD example artifacts description in criterion 23 (misinterpr) #interproc	4.0.0
#381	Subcontractors not relied upon have to provide information about Selection Criteria	clarification
#362	SC-References: performance of works / deliveries / services of the specified type	3.3.0
#353	Questions regarding lots and group of lots concepts #interproc	3.3.0

6. Next meetings

➤ Annual Seminar 2024

- ✓ 3 to 4 December
- ✓ Online
- ✓ Luxembourg
- ✓ Topics
- TED event
- interested?
- interested?
- proposals?

➤ OUC meetings 2025

- ✓ 27 March, 10.00-11.30

➤ Bilateral meetings

- ✓ Ongoing / ad hoc

THANK YOU FOR YOUR PRESENCE

ANY QUESTIONS?

Please send your questions to

OPESPD@publications.europa.eu

