## **Accelerated Procedure diagram**

*Class diagram in package 'epo'*

Accelerated Procedure

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Accelerated Procedure

## **Contract diagram**

*Class diagram in package 'epo'*

Contract

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Contract

## **Criterion diagram**

*Class diagram in package 'epo'*

Criterion

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Criterion

## **Documents diagram**

*Class diagram in package 'epo'*

1. Any Document can be seen as particular expression and manifestation of a Work, as defined in the IFLA Library Reference Model (LRM). Thus a Notice, for example, could be a "Work" expressed in French and received as an XML file (i.e. manifested as an XML). See [IFLA LRM](https://www.ifla.org/files/assets/cataloguing/frbr-lrm/ifla-lrm-august-2017.pdf) ontology for more details.
2. In the scope of the e-Tendering, we can identify many different documents, e.g. at e-Notification and e-Access time, one identify "Procurement Documents", whilst during the e-Submission, the Economic Operator prepares and sends "Tender Documents".
3. Procurement Documents are prepared by the Procuring Entity and are always particular to a Procurement Procedure with the exception of Prior Information Notices.
4. The very first documents in a Procurement Procedure are typically Notices. Three main groups of Notices can be distinguished: Prior Information Notice (and variants of it), Contract Notice and Contract Award Notice. For details on these, please consult the Directives and the rest of the documentation about the ePO.
5. Prior Information Notices (PIN) announce Procurement Projects. Because at PIN publications time these "projects" have not been totally defined, the Procurement Procedures do not exist yet and therefore the PINs normally cannot refer to one or more Procurement Procedures.
6. Contract Notices (CN) announce the initiation of Procurement Procedures. If the CN follows a PIN previously published, the CN should refer to that PIN.
7. Contract Award Notices (CAN) in term announce the resolution about the awarding of the Contract(s). They should always refer to the Contract Notice published in relation to the Procurement Procedure.
8. The administrative and Technical Specifications of a Procurement Procedure are part of the "Call for Competition" documents. Depending on the type of Procurement Procedure, Call for Competitions can be either Call for Tenders (e.g. in the case of Open Procedures) or Call for Proposals (typically in two-phased procedures).
9. In two-phased procedures the need of restricting the candidates to a short list may appear and for these cases Invitations to Tender are send to each one of the candidates, normally as an e-mail. Candidates interested in participate may be required to submit an Expression of Interest. The Invitation to Tender may refer to the Notices previously published in the context of the Procurement Procedure.
10. At tendering time, the Economic Operator submits its own Tender Documents, which normally encompass a Financial Tender and a Technical Tender.



Documents

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Documents

## **Economic Operator diagram**

*Class diagram in package 'epo'*

1. Any Procurement Procedure refers always to one Economic Operator (as Tenders, Winner of the contract, etc.) or to a group of Economic Operators (Economic Operator Group), e.g. Consortia, Joint ventures, Undertaking (Group Type code list).
2. When the Economic Operators are members of a group (Economic Operator Group), they play different roles in the Procurement Procedure, e.g. Consortia, Joint ventures, Undertaking (Group Type code list).
3. One Economic Operator may rely on 3rd parties; e.g. Economic Operator subcontracts other Economic Operators.
4. Economic Operators may be pre-qualified in a national Pre-Qualification System (PQS), which is an “Organization”.
5. When guarantees are required by the Procuring Entity, Economic Operators may have to provide Financial Account (e.g. a bank account data).



Economic Operator

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Economic Operator

## **Evaluation Criterion diagram**

*Class diagram in package 'epo'*

Evaluation Criterion

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Evaluation Criterion

## **Lots diagram**

*Class diagram in package 'epo'*

Lots

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Lots

## **Procurement Procedure diagram**

*Class diagram in package 'epo'*

Procurement Procedure

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Procurement Procedure

## **Procurement Project diagram**

*Class diagram in package 'epo'*

Group of procurement procedures, a procurement procedure, a lot or a group of lots.

Examples: A PIN advertising multiple procurement procedures; a procurement procedure divided in lots that are not grouped; a procurement procedure divided into lots that have been grouped; a procurement procedure without lots.

All subclasses of Procurement Project are disjoint. In the case of Lots, if the procedure is divided into lots that are grouped, it cannot contain individual lots outside of a group of lots.

The properties groups and dividedInto are disjoint.

Procurement Project

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Procurement Project

## **Procurement Terms diagram**

*Class diagram in package 'epo'*

1. Any Procurement Procedure has properties that define the procedure itself on the one hand, but also the "terms" that limit or specify the procurement activity.
2. The Procurement Terms are "conditions or stipulations establish by the Procuring Entity limiting what is proposed to be granted or done by the Economic Operator" (see the ePO Glossary definition):

* Financial Terms: economic conditions and stipulations refer to the procurement. Beware that the information related to the funding of the procurement are not considered terms but general information, see the diagram Procurement Project for more details.
* Subcontract Terms: conditions and stipulations about the works or services that the Economic Operator will be able to rely on 3rd parties.
* Tender Submission Terms: conditions and stipulations about the Tender and how it is required to be submitted.
* Contract Terms: conditions and stipulations that will affect the future contract(s) once awarded.
* Tender Evaluation Terms: conditions and stipulations aimed to evaluate the tenders.
* Notification Terms: conditions and stipulations regarding notification deadlines.
* Procedure Terms: conditions and stipulations determining how the Procuring Entity requires the Economic Operator to execute certain steps of the procedure.



Procurement Terms

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Procurement Terms

## **Procuring Entity diagram**

*Class diagram in package 'epo'*

1. In any Procurement Procedure, there is at least one Procuring Entity;
2. Procuring Entities are “Organizations”, appropriately identified and described (IDs, Names, Addresses, Contact Points, etc.);
3. Depending on its main activity a Procuring Entity may be identified simply as a Contracting Authority or as a Contracting Entity that in turn may be a Contracting Authority, a Public Undertaking or entities with special or exclusive rights which activity is (Procuring Entity Type code list);
4. For some Procurement Procedures, a Procuring Entity can join other Procuring Entities (Joint Procurement);
5. In these cases, the Procuring Entities participating in the join procurement may adopt one role (Procuring Entity Role Type code list);
6. Procuring Entities are in general responsible for the management of purchase, in which case, they also act as “Buyers”;
7. This is not always the case, in some cases the Procuring Entity may buy through another Procuring Entity (Buyer Role Type code list).



Procuring Entity

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Procuring Entity

## **Technique diagram**

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Technique

## **Tender diagram**

*Class diagram in package 'epo'*

1. According to Directive 2014/24/EU, the term Economic Operators can also refer to a sole Economic Operator or to a group of Economic Operators (Economic Operator Group), e.g. Consortium, Joint Venture, other;
2. In a Procurement Procedure, a Tender is submitted (and hence linked to a specific Procurement Procedure) by either one sole Economic Operator, a member of a group (e.g., the lead of an Economic Operator Group) or a Service Provider acting on behalf of one of them (disjoint axioms).
3. One Tender may attach one or more "Tender Documents" (e.g. the Financial Tender, the Technical Tender, Technical annexes and specifications, etc.; see the Diagram "Documents");
4. In Procurement Procedures divided into Lots, one Economic Operator may present one Tender that specifies to which Lots it applies.



Tender

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Tender