Maintenance and evolution of the ESPD EDM
Publications Office – C.3

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

17th June 2020

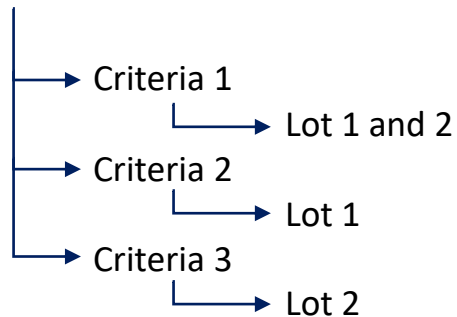**Publications Office**

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Table of contents

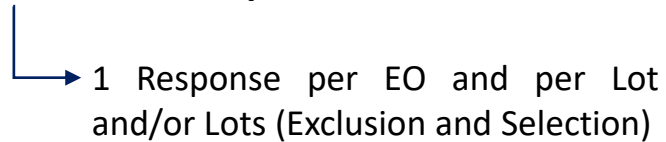# 1. Summary of last meeting on 19 May 2020

- ❖ Meeting minutes: https://github.com/ESPD/ESPD-EDM/blob/wgm-reports/ESPD_Minutes_MS_Meetings_20200519_v1.0.pdf

- ❖ **ESPD-EDM 2.1.1**: explanation of the work done and changes implemented.

- ❖ **Roadmap next ESPD-EDM release**: roadmap for the upcoming months, the objective, and the main task to be analysed.

- ❖ **Code Lists**: harmonisation analysis of the current ESPD code lists with both eForms and eProcurement Ontology.

- ❖ **Evaluation Method Type Discussion**: there is a common agreement on keeping ESPD as simple as possible and not to include weighting in any Selection Criteria.
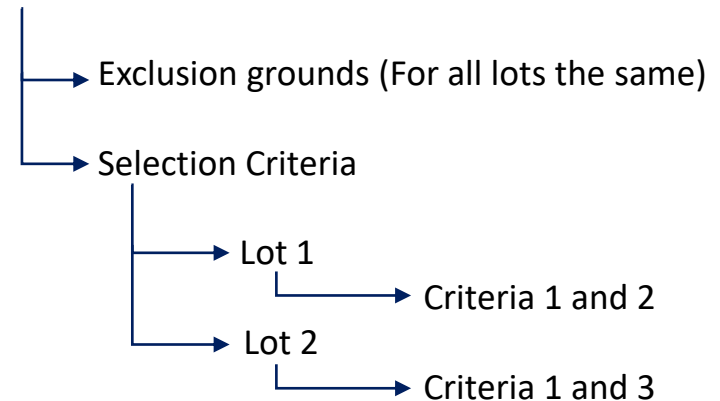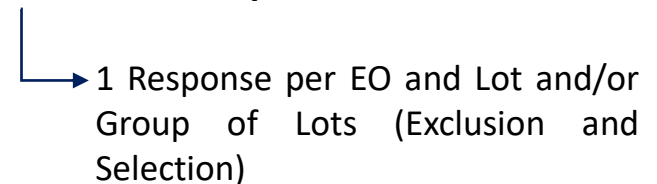
2. Lots Management

1 - XML Request (current ESPD)

- Criteria 1
  - Lot 1 and 2
- Criteria 2
  - Lot 1
- Criteria 3
  - Lot 2

1 - XML Request (alternative solution)

- Exclusion grounds (For all lots the same)
- Selection Criteria
  - Lot 1
    - Criteria 1 and 2
  - Lot 2
    - Criteria 1 and 3

1..n - XML Response

- 1 Response per EO and per Lot and/or Lots (Exclusion and Selection)

1..n - XML Response

- 1 Response per EO and Lot and/or Group of Lots (Exclusion and Selection)

3. GitHub Issues - Information

- ❖ **Issue** **#242** Inconsistencies with Regulation and incorrect nesting @ Criteria #7 and #8.

  #7:
  CRITERION.EXCLUSION.CONTRIBUTIONS.PAYMENT_OF_TAXES

  #8:
  CRITERION.EXCLUSION.CONTRIBUTIONS.PAYMENT_OF_SOCIAL_SECURITY

- ❖ **Summary:** In the criteria mentioned above, the sub question (d) is nested within the sub question (c), meaning that it only appears when the answer to (c) is positive. This is not consistent with the Regulation.

- ❖ **Action**: Include sub question (d) at same level as (a) (b) and (c).

3. GitHub Issues - Information

❖ **Issue [#243](#) Criteria #9, #10, #11 and #24 have an unnecessary question:**
CRITERION.EXCLUSION.SOCIAL.*

❖ **Summary:** The criteria mentioned above has an extra text field that appears when answering positively to the first question, and this should only appear in the second question. (As can be read in the Regulation).

❖ **Action:** Remove the unnecessary question that appears in case of a positive answer.

3. GitHub Issues - Information

❖ **Issues** [#260 - #264](#) Extension of the UBL schema to allow the representation of concepts that would be out of the code list ProcedureType (CONCESSION, DESIGN_CONTEST, NEGOTIATED_ACCELERATED, OPEN_RECUR).

❖ **Summary:** Some of the codes included in the ProcedureType were not type of procedures but legal basis, attributes or subtypes. Moreover, the proposal was to replace the codelist with the Procurement Procedure Type from EU Voc, which does not include some of the codes. Then, the foreseen solution was the extension of the model.

❖ **Solution**:

- Information related to the procedure will come from eForms. Therfore, there is no need to include the extension. The Information about the procedure will be included within the eForms' CN, then ESPD does not need to keep the information. Only would include Exclusion Grounds and the Selection Criteria.

- An extension to UBL would add complexity to the schema.

❖ All the related issues have been closed.

3. GitHub Issues - Information

❖ **Issue [#265](#)** PropertyDataType in Criterion #30:
CRITERION.SELECTION.ECONOMIC_FINANCIAL_STANDING.TURNOVER.AVERAGE_YEARLY.

❖ **Summary:** QUANTITY_INTEGER was added to represent the question "Quantity of years" in the current ESPD, actually there is a code "QUANTITY_YEAR" that allows to represent better the information required.

					Name	Description	Value(	Cardinality	PropertyDataType
30 {CRITERION					Average yeaı	Its average yearly turnover			
	{LEGISLATION}								
	{QUESTION_GROUP							1	
		{QUESTION}			Number of years		[Respc	1	QUANTITY_INTEGER
		{QUESTION}			Average turnover		[Respc	1	AMOUNT
	QUESTION_GROUP}								
	{QUESTION_GROUP							1	
		{QUESTION}			Is this information a		true	1	INDICATOR
		{QUESTION_SUBGROUP						0..1	
			{QUESTION}		Evidence supplied		[Respc	1..n	EVIDENCE_IDENTIFIER
		QUESTION_SUBGROUP}							
	QUESTION_GROUP}								
CRITERION}									

❖ **Action:** Change from QUANTITY_INTEGER to QUANTITY_YEAR to be more specific. It will be harmonised for all the criteria containing the question "Number of years".

3. GitHub Issues - Information

❖ **Issue [#267](#)** Cardinality of references Criteria (#37, #38 and #39) in the extended version:
CRITERION.SELECTION.TECHNICAL_PROFESSIONAL_ABILITY.REFERENCES.*

❖ **Summary:** In the criteria mentioned above, there is a question related to the references that CA asks to the EO, which currently only allows 1 reference. Actually, a CA could ask for more than one reference.

❖ **Action**: Change the cardinality for "Reference" REQUIEREMENT_SUBGROUP from 1 to 1..n.

3. GitHub Issues - Information

❖ **Issue [#270](#)** Element code in criterion #36 is missing:
CRITERION.SELECTION.ECONOMIC_FINANCIAL_STANDING.OTHER_REQUIREMENTS

❖ **Summary:** The element codes are not included within question subgroups of criteria #36. Therefore, the data processing could be done wrongly. Currently, the QUESTION_SUBGROUPs remarked below, do not have element code (ON*, ONTRUE, or ONFALSE).

❖ **Action:** Add the element code ON* to both QUESTION_SUBGROUP to ensure the proper processing of the criterion data.

3. GitHub Issues - Consultation

❖ **Issue [#202](#)** Part IV: Set up of an economic operator (Criterion #33):
CRITERION.SELECTION.ECONOMIC_FINANCIAL_STANDING.TURNOVER.SET_UP

❖ **Summary:** Where the information related to the EO set up shall be placed, as it currently has an specific criterion (#33). However, and for example, a large company, just started to do business in a new domain, so for the turnover for that specific domain, they might have no turnover yet.

❖ **Proposed solutions:**

1. Include the information about the Set up of an EO within the Part II – Section A (EO information).
   Implications: change the criterion type from Selection to Other.

2. Or, remove criterion #33 and include it as sub criterion of general and specific turnover criteria.
   Implications: update the criteria of specific and yearly turnover to include the subcriterion regarding the EO Set up.

3. Or, keep it as it is.
   Implications: N/A

3. GitHub Issues - Consultation

❖ **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:

3. GitHub Issues - Consultation

❖ **Proposed Solution:**
  - To harmonise all selection criteria to have always an initial question.
    > **Implications**: the EO has the possibility to decide to answer the selection criteria or rely on another company.

  - And, to change this initial question to have 3 possible answers: "Yes/No/Partially".
    - **YES**: The EO fulfils this criteria.
    - **NO**: The EO does not fulfil this criteria. This EO relies on another company (criteria #60) to fulfil this criteria.
    - **PARTIALLY**: The EO fulfils this criteria partially. This EO relies on another company (criteria #60) to fulfil the other part of the criteria.

      > **Implications:** The change of data type from indicator to a new data type with 3 possible answers.

  - And, add another question to the selection criteria to reference the company, specified in criteria #60, that would fulfil the criteria.
    > **Implications:** This link between the selection criteria and the company that would fulfil it, would automatize the data processing.

4. Next meetings

❖ **Next meetings:**

- Thursday 9th July.
- Dates to confirm for August and September

❖ **Annual Seminar**: Thursday 1st October afternoon

Questions ?