

Maintenance and evolution of the ESPD EDM

Publications Office – C.3

ESPD Meeting OP-GROW with MS

19th May 2020



Publications Office



an NTT DATA Company

Table of contents

1. Introduction
2. ESPD-EDM 2.1.1
3. Roadmap ESPD-EDM
4. Code List – Work Done
5. Evaluation Method Type Discussion
6. Lots Management discussion

1. Introduction

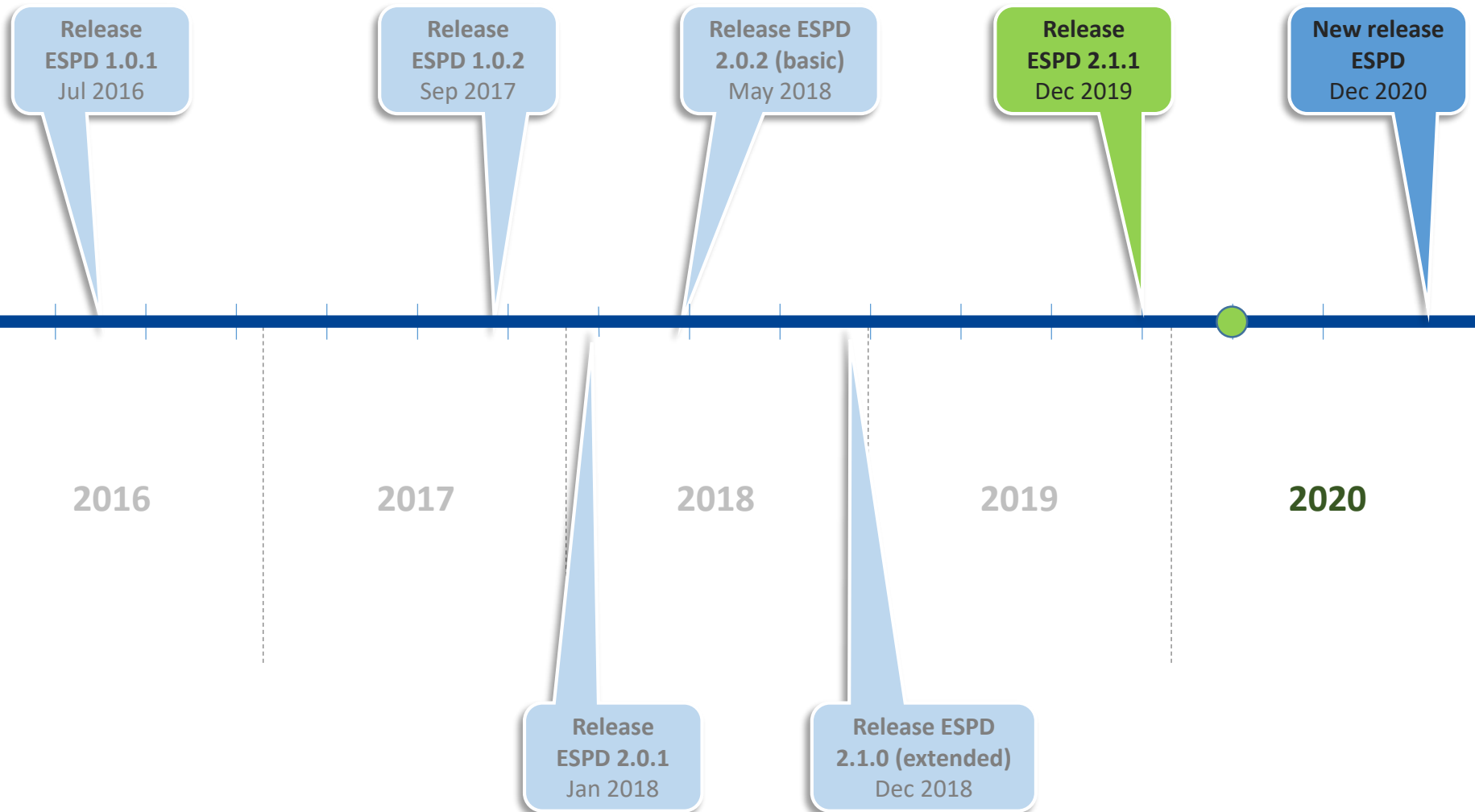


Table of contents

1. Introduction
2. **ESPD-EDM 2.1.1**
3. Roadmap ESPD-EDM
4. Code List – Work Done
5. Evaluation Method Type Discussion
6. Lots Management discussion

2. ESPD-EDM 2.1.1

- ❖ **New version [ESPD-EDM v21.1](#) available since December 2019.**
- ❖ **Main updates (https://espd.github.io/ESPD-EDM/v2.1.1/release_notes.html):**
 - Revision of the nomenclature: from Regulated and Self-contained ESPD criteria taxonomy to Basic and Extended.
 - Update of the technical Code Lists, in order to enhance the flexibility to the response of the criteria.
 - Update of the Criteria Taxonomy:
 - New criteria for using other criteria for the specific needs of procedures regulated by Directive 2014/25/EU and Directives 2009/81/EC.
 - New criterion “Is the economic operator a Micro, a Small or Medium-sized Enterprise?” to allow to give the yes/no answer included in the Directive.
 - Update of the [Interoperability TestBed](#): National grounds are no longer mandatory.
 - Update of the [online documentation](#) according to the latest changes.
 - Creation of the [wiki on GitHub](#) to introduce the main information needed to start understanding and developing ESPD.

Table of contents

1. Introduction
2. ESPD-EDM 2.1.1
- 3. Roadmap ESPD-EDM**
4. Code List – Work Done
5. Evaluation Method Type Discussion
6. Lots Management discussion

2. Roadmap ESPD-EDM

❖ **Objective:** Align ESPD-EDM, as much as possible, with eForms.
If backwards compatibility cannot be maintained, a new major version will be introduced (ESPD-EDM 3.0.0).

❖ **Tasks** to be analysed:

- **Data flow:** clear vision on the data flow between ESPD, eCertis, eForms, TOOP.
- Upgrade to **UBL 2.3** and alignment with **eForms**.
- Merge both, **ESPD Basic and Extended** models.
- **eCertis, TOOP and Core Criterion and Core Evidence Vocabulary (CCCEV)** alignment.
- ESPD-EDM simplification.
- **ESPD code lists alignment** with code lists used by **eForms** (published in EU Vocabularies).
- Online documentation simplification.
- **GitHub issues:** analysis and implementation on the need per each of the issues.

Table of contents

1. Introduction
2. ESPD-EDM 2.1.1
3. Roadmap ESPD-EDM
4. **Code List – Work Done**
5. Evaluation Method Type Discussion
6. Lots Management discussion

4. Code List – Work Done

❖ Objective:

- Harmonisation of the current ESPD code lists with both, eForms and eProcurement Ontology using EU Vocabularies.

4. Code List – Analysis results so far

Code List ESPD 2.1.1	Identified Replacement Code List	Comments
ProcedureType	Procurement Procedure Type (EU Voc)	Only codes related to current procedure types.
BidType	BidType (EU Voc)	
ConfidentialityLevel	ConfidentialityLevelType (ePO Ontology)	Restricted to use only the codes needed in ESPD.
CriteriaTaxonomy	New table in EU Voc	
EOIndustryClassification Code	Economic Operator Size (EU Voc)	
EORoleType	TBD	ESPD should use Sole Tenderer (ST) code instead of Sole Contractor (SC).
EULanguageCode	Language (EU Voc)	Change from ISO-639-1 (2 digits) to ISO-639-2 (3 digits).
EvaluationMethodType	TBD	
DocRefContentType	New table in EU Voc	
ProjectType	Contract Nature (EU Voc)	Only codes related to procedure types.
ServiceProjectSubType	TBD	
CurrencyCode	Currency (EU Voc)	
CountryCodeIdentifier	Country (EU Voc)	Change from alpha-2 (2 digits) to alpha-3 (3 digits).

Table of contents

1. Introduction
2. ESPD-EDM 2.1.1
3. Roadmap ESPD-EDM
4. Code List – Work Done
- 5. Evaluation Method Type Discussion**
6. Lots Management discussion

5. Evaluation Method Type Discussion

❖ Current ESPD 2.1.1

- Only allows the weighting when ESPD request is extended, and multi-staged procedures: First stage equals to PASSFAIL, even if the criteria have weight assigned.
- Only for technical and professional ability selection criteria.
- Values of the code list:

Code	Name
PASSFAIL	Pass or Fail
WEIGHTED	The Criterion is weighted

❖ Main questions

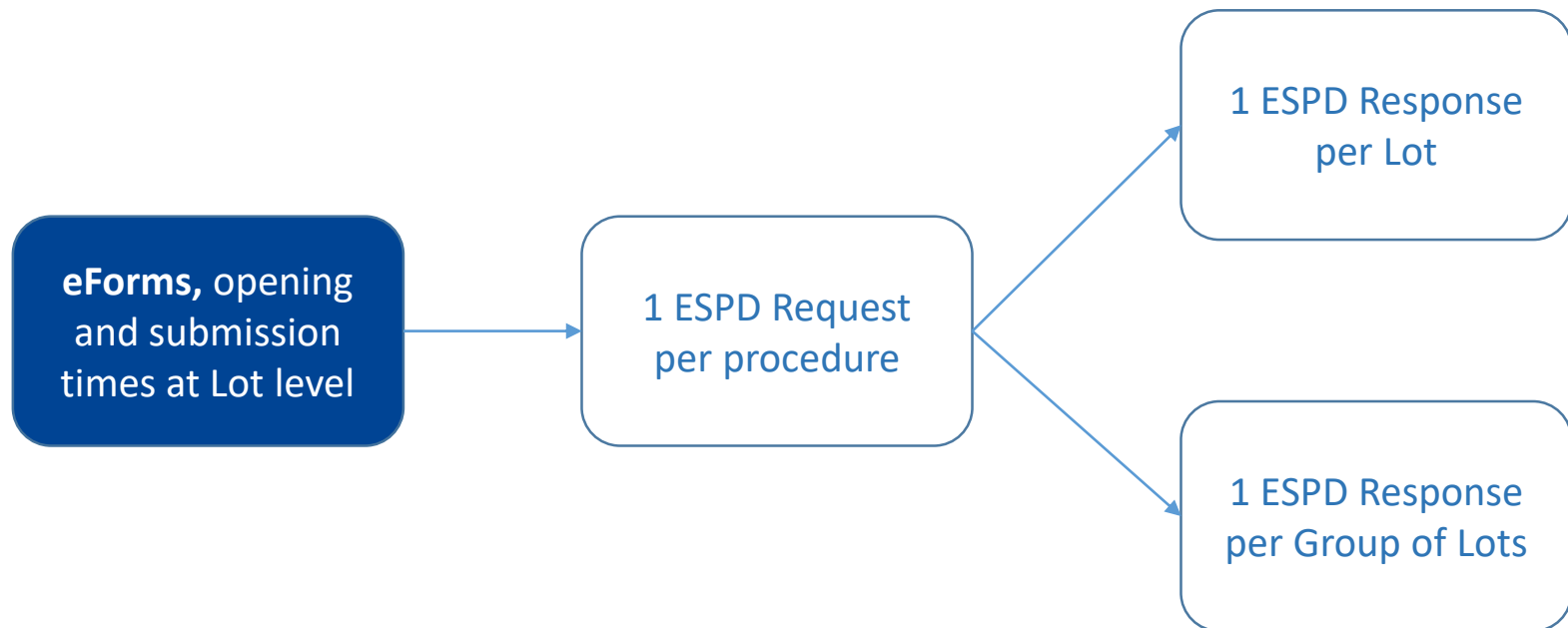
- Does it make sense to have this codelist?
- If so, should the selection criteria include weights and how?

Table of contents

1. Introduction
2. ESPD-EDM 2.1.1
3. Roadmap ESPD-EDM
4. Code List – Work Done
5. Evaluation Method Type Discussion
6. **Lots Management discussion**

6. Lots Management discussion

- ❖ The new suggested approach follows the eForms alignment as before mentioned:



6. Lots Management discussion



ESPD Request sample_Lots.xml

```
<cac:ProcurementProjectLot>
  <cbc:ID schemeName="Lot">LOT-0001</cbc:ID>
</cac:ProcurementProjectLot>
<cac:ProcurementProjectLot>
  <cbc:ID schemeName="Lot">LOT-0002</cbc:ID>
</cac:ProcurementProjectLot>
<cac:ProcurementProjectLot>
  <cbc:ID schemeName="LotsGroup">GLO-0001</cbc:ID>
  <cac:TenderingTerms>
  <cac:LotDistribution>
    <cbc:MaximumLotsAwardedNumeric>1</cbc:MaximumLotsAwardedNumeric>
    <cbc:MaximumLotsSubmittedNumeric>3</cbc:MaximumLotsSubmittedNumeric>
  <cac:LotsGroup>
    <!-- Definition of Group of Lots 1 -->
    <cbc:LotLotsGroupID schemeName="LotsGroup">GLO-0001</cbc:LotLotsGroupID>
    <cac:ProcurementProjectLot>
      <cbc:ID schemeName="Lot">LOT-0001</cbc:ID>
    </cac:ProcurementProjectLot>
    <cac:ProcurementProjectLot>
      <cbc:ID schemeName="Lot">LOT-0002</cbc:ID>
    </cac:ProcurementProjectLot>
  </cac:LotsGroup>
  </cac:LotDistribution>
  </cac:TenderingTerms>
</cac:ProcurementProjectLot>
```

Questions

