

Guide

**Defining Open Contracting Data Standard
Functional Requirements for Electronic
Government Procurement Systems**



September 2021

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List of Abbreviations

API	Application programming interface
CSV	Comma-separated values
e-GP	Electronic Government Procurement
I-JSON	Internet JSON
JSON	JavaScript Object Notation
OC	Open Contracting
OCDS	Open Contracting Data Standard
ocid	Open Contracting Identifier
OCP	Open Contracting Partnership
OGP	Open Government Partnership
URL	Uniform Resource Locator
UTF	Unicode Transformation Format
XLS	Microsoft Excel file format

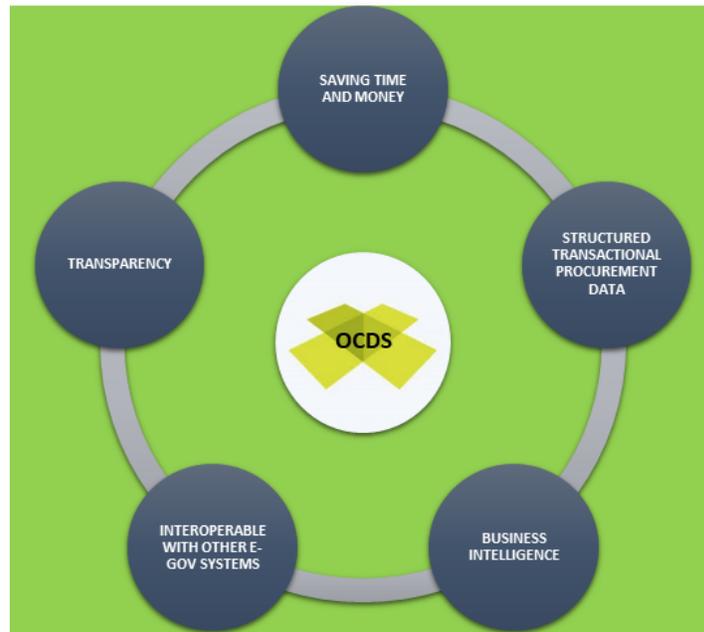
1. Benefits of Open Contracting in e-GP

The World Bank e-Procurement Toolkit¹ defines Electronic Government Procurement (e-GP) as:

the collaborative use of information and communications technologies by government agencies, the bidding community, regulatory and oversight agencies, other supporting service providers, and civil society in conducting ethical procurement activities in the government procurement process cycle for the procurement of goods, works, and services and the management of contracts, thereby ensuring good governance and value for money in public procurement and contributing to the socioeconomic development of a country.²

Implementation of the Open Contracting Data Standard is an essential enhancement to an e-GP system. The OCDS is a data standard that has been designed to facilitate publication and analysis of data and documents related to all stages of a contracting process. By including the OCDS in e-GP by design, or upgrading an existing system to account for OCDS, an e-GP system will become more transparent and also facilitate business intelligence, analysis, data sharing, and monitoring that will assist policy makers and procurement practitioners to improve value for money, integrity, fairness and performance of public contracts.

Figure 1 - Benefits of Open Contracting



¹World Bank e-Procurement Toolkit Accelerating E-procurement Solutions: E-procurement Preparation www.eprocurementtoolkit.org

² See Shakya, R. K. (2015). Good Governance in Public Procurement: An Evaluation of the Role of e-Procurement System. (141) www.academia.edu/15810750/Good_governance_in_public_procurement_An_evaluation_of_the_role_of_an_e-procurement_system

2. About this document

2.1 Who is this document for?

This document has been prepared by the Open Contracting Partnership to provide advice concerning the Opening Contracting Data Standard (OCDS) for those involved in designing and implementing e-GP projects and in particular:

- Governments, sub-national governments and public sector organisations wishing to include Open Contracting and the OCDS functional requirements in new e-GP systems being planned or procured or to upgrade their existing e-GP systems to include Open Contracting and the OCDS.
- Other key e-GP stakeholders e.g.:
 - Multilateral and bilateral development organisations providing support to their clients in acquiring e-GP systems;
 - Technical consultants advising their clients on the development of technical requirements for the tender document for new e-GP systems;
 - e-GP system vendors wishing to consider configuring their systems to provide Open Contracting and OCDS.

It enables a new e-GP system to be implemented open by design and can help governments deliver commitments under their Open Government Partnership Action Plans³.

2.2 OCDS options for different e-GP implementations

This document provides advice covering the various scenarios from developing a new bespoke e-GP systems such as that developed in Ukraine in 2015, buying a commercial off the shelf (COTS) systems e.g. Zambia, to upgrading existing systems to include OCDS capabilities e.g. Paraguay.

Existing e-GP systems may be able to provide data that can be converted to OCDS using a combination of the following depending on the circumstances:

Table 1 - Tools for existing e-GP systems

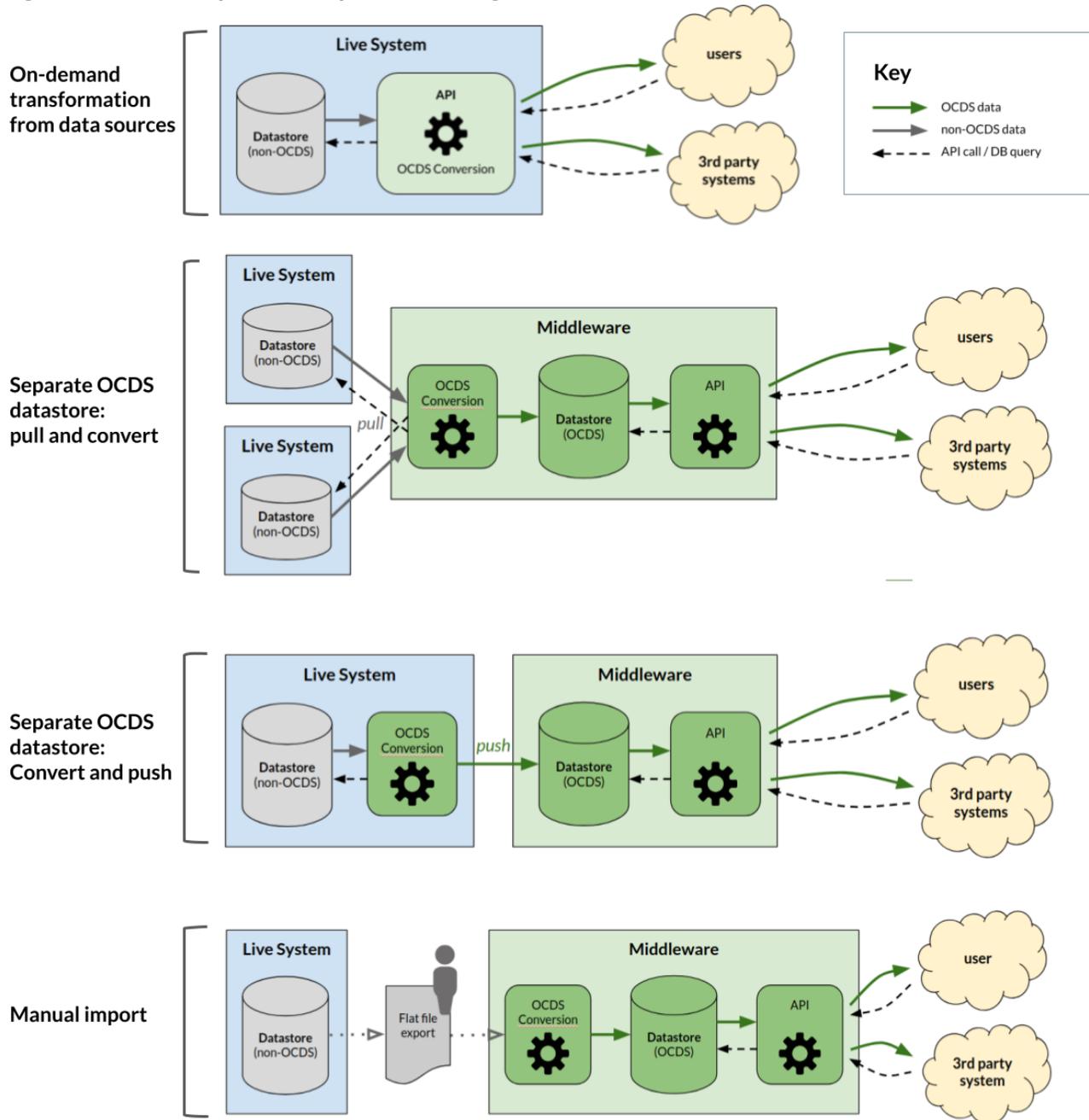
Application Programming Interface (API)	In general, an API is a set of clearly defined methods of communication among components. In Figure 2, the API provides methods for third-party users or systems to access OCDS data.
Datastore	In Figure 2, this is the database that stores a copy of the data and documents extracted from the e-GP system and converted to OCDS format, ready to be accessed via the API.
Middleware	In Figure 2, this is the software and database that sits between the e-GP system and the third-party systems that access OCDS data via the API. Implementing a middleware is a strategy to limit the number of changes needed to the e-GP system itself.

³Open Government Partnership <https://www.opengovpartnership.org>
<http://standard.open-contracting.org>
data@open-contracting.org

3rd Party System	In Figure 2, these are other systems, independent of the e-GP system, that access OCDS data via the API. Such systems might include Open Contracting Data Portals.
Flat file export	In Figure 2, this is a manual export of the data from the e-GP database to a flat format (e.g. CSV) which can then be imported into a middleware system for conversion to OCDS format.

Figure 2 outlines 4 possible scenarios for e-GP systems to publish OCDS data.

Figure 2 - Technical options for Open Contracting



2.3 Purpose of this document

This document can be used to develop functional requirements for Open Contracting and the OCDS when purchasing a new e-GP system and/or an Open Contracting Data Portal or upgrading the functionality of an existing e-GP system.

The e-GP OCDS template provided in Section 3 has been prepared for inclusion in tender documents for new e-GP systems and comprises the following:

Table 2 - Structure of the template

Section of e-GP OCDS template	Purpose
Section A. Request for bidders track record and their proposed methodology for implementing Open Contracting and OCDS	<ul style="list-style-type: none"> a. Establishes what experience the e-GP bidder has with OCDS and explains how they would approach implementing e-GP with OCDS. b. Gives the purchaser of the e-GP system information to evaluate both experience and approach, possibly allocating technical points for both.
Section B. General functional requirements - Open Contracting and OCDS	<ul style="list-style-type: none"> a. Explains in general terms the requirements and concepts of OC and OCDS. b. Provides e-GP vendors with links to a wide range of online resources explaining OC and OCDS. c. Provides general functional requirements for OCDS data format, OCDS data quality and OCDS data access methods.
Section C. Detailed functional requirements: Part 1 C1 Open Contracting and OCDS and Part C2 Open Contracting Data Portal	<ul style="list-style-type: none"> a. Provides a detailed draft list of functional OC and OCDS requirements that the e-GP system should fulfill. b. Provides a detailed draft list of functional OC and OCDS requirements that the Open Contracting Data Portal should fulfill (and which may be an integral part of the e-GP system or procured under a separate contract from a third party supplier). c. The purchaser of the e-GP system should review the draft list and edit as necessary and can consider allocating technical points for each of the functional requirements. If any of the OCDS requirements are to be fulfilled by an Open Contracting Data Portal, the lists should be edited accordingly. d. The purchaser can request bidders to indicate in their bids whether the e-GP system offered meets or does not meet each of the functional requirements to assist the purchaser with evaluation.

2.4 How to use the e-GP OCDS template

Specifying the requirements for OCDS publication from an e-GP system requires significant collaborative effort over several months from a team that includes people with both policy and technology experience. The team responsible for preparing the technical specifications of the e-GP system ought to include the following roles, though one individual might play several roles:

- A project manager who will oversee the project timeline and deliverables
- A procurement expert who is familiar with procurement legislation and procedures.
- A policy champion who can help navigate the policy decisions of publishing and using OCDS data
- A user champion who will represent the needs of data users throughout the project.

The team can:

- Make a copy of the draft functional requirements in Section 3, review and use to consult e-GP project stakeholders to validate them, taking particular account of the legal framework and procurement and other legislation impacting on public procurement and any commitments under any Open Government partnership National Action Plan;
- Include functional requirements for an Open Contracting Data Portal if required to be supplied as part of the contract for the e-GP system, including moving any relevant OCDS data requirements from Sections B and C.1 to Section C.2.
- Modify the draft functional requirements as necessary to suit the local conditions and needs of the country concerned and the design of the public procurement system;
- Insert them in the appropriate place in the invitation to tender document for the new e-GP system;
- Indicate if these functional requirements are an Important, Desirable or a Mandatory Functional Requirement;
- If procuring an e-GP system on a quality and cost basis rather than lowest cost, decide what points for evaluation should be allocated to each of the OCDS functional requirements.

Please note:

Boxed text in bold italics is guidance for the organisation preparing the tender for the e-GP system (the Purchaser), and should be removed from the final version of the functional requirements.

3. Template for e-GP OCDS functional requirements

Note to the Purchaser (delete from final document) - The following text in Sections A, B and C can be inserted into the tender document for the e-GP system once the draft functional requirements for OCDS and Open Contracting have been reviewed and revised as necessary.

Section A. Bidders track record and proposed methodology for implementing OCDS

Note to the Purchaser (delete from final document) - The following proposed text requires bidders to provide information on their previous experience if any in implementing the OCDS and also requires them to explain how they would implement OCDS if they were awarded the contract. If evaluating on a quality and cost basis, decide how many points to allocate for a. and b. for the technical evaluation.

The Bidder is required to submit with their offer:

- a. Details of any previous experience in implementing the Open Contracting Data Standard (OCDS).
- b. An explanation of how they would approach implementing the e-GP system to include OCDS publication as described in the Technical Requirements Section B and C and include a draft Open Contracting Data Standard Implementation Plan. This plan must document the Bidder's proposed approach to implementing OCDS in the e-GP system and include a draft list of OCDS fields and documents that will be published. A mapping from the OCDS concepts listed in Technical Requirements Section C to OCDS fields is provided in the OCDS Publication Plan Template: <https://www.open-contracting.org/resources/ocds-publication-plan-template>.
- c. Some sample data from their e-GP system in native format e.g. XML and the same data in OCDS and written confirmation that this OCDS output (or better) will be available in the purchased solution.

Section B. General functional requirements: Open Contracting and OCDS

Note to the Purchaser (delete from final document) - The first section of the following text provides the Bidder with sufficient information to understand the principles of Open Contracting and be able to access additional information from the OCP website.

Sections B1, B2 and B3 set out general functional requirements for data format, data quality and data access respectively, and should be edited by the Purchaser prior to inserting into the tender document for the e-GP system. If any of these functions should be carried out by an Open Data Contracting Portal, the relevant sections should be edited accordingly. If evaluating bids on a quality and cost basis, decide how many points to allocate for each section for the technical evaluation.

Also consider indicating which requirements are mandatory.

Open Contracting Data Standard

The e-GP system must be configured to fulfil the requirements for Open Contracting and the OCDS specified elsewhere within this document and bidders are required to familiarise themselves with the information provided in Section 4 concerning Open Contracting and OCDS.

The OCDS enables disclosure of data and documents at all stages of the contracting process by defining a common data model. It is openly licensed and was created to support organizations to increase contracting transparency, and allow deeper analysis of contracting data by a wide range of users.

OCDS provides:

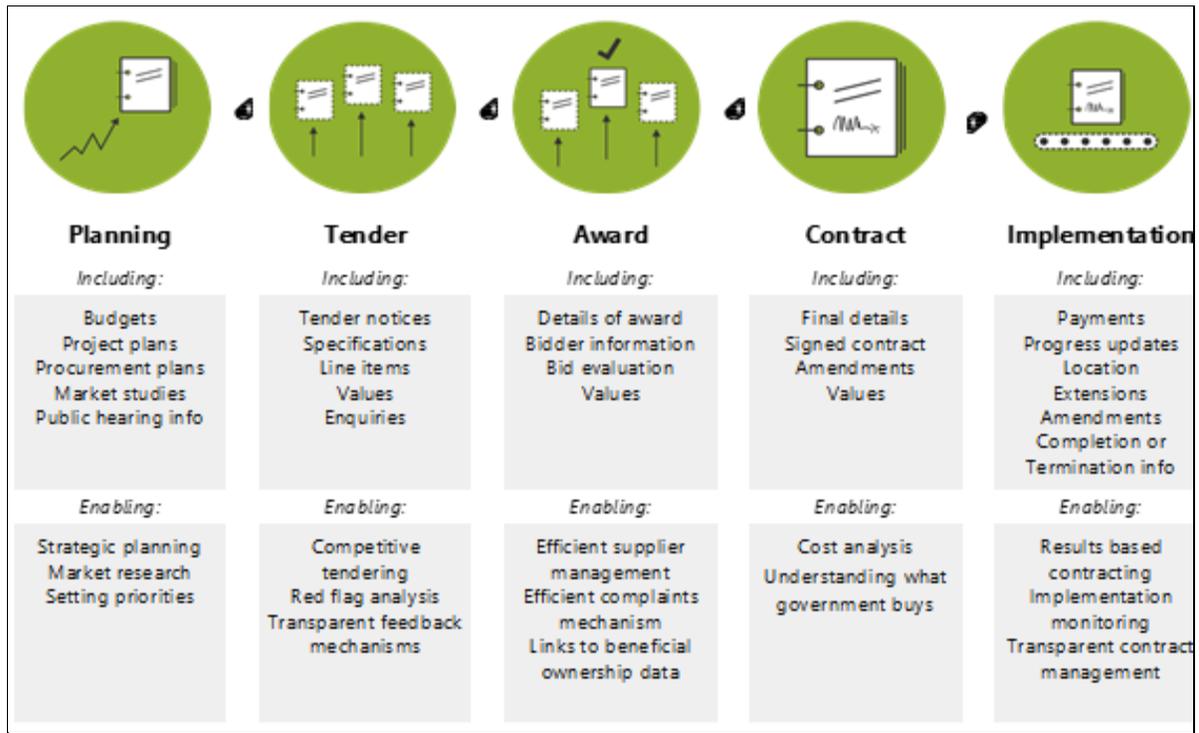
- A set of recommended fields to disclose;
- A common structured data model;
- An approach to regular publication of information on all contracting processes.

At the heart of OCDS is the idea that it should be possible to follow a contracting process from planning and tender, through to award and implementation. The data made available at each stage described in Figure 3 should be usable by, and useful to, key stakeholders, including businesses, citizens and government itself.

At the same time, open contracting is informed by global principles⁴ and is an iterative approach (understanding that improvements may start small with offline information sharing and citizen monitoring, civil society collaboration with government, and then innovation).

⁴ <http://www.open-contracting.org/get-started/global-principles/>

Figure 3 - 5 stages of Open Contracting



Part B.1 OCDS Data Format General Requirements

Note to the Purchaser (delete from final document) - OCDS data can be published in different formats. It is a best practice to provide data in multiple formats, so that as many users as possible can use the data without first having to transform it to their preferred format. In OCDS terms, this means publishing both structured JSON data and tabular CSV or spreadsheet data. This section includes requirements to publish data in both JSON and tabular formats.

For more information on data formats in OCDS, see

<https://standard.open-contracting.org/latest/en/guidance/build/#establish-your-publication-formats-and-access-methods>

REF	DESCRIPTION OF REQUIREMENT
OCDSDF 1	The e-GP system must publish OCDS data in JSON format.
OCDSDF 2	The OCDS data published by the e-GP system must conform to the latest version of the OCDS schema, available at: https://standard.open-contracting.org/latest/en/schema/
OCDSDF 3	The OCDS JSON data published by the e-GP system must be packaged according to the packaging schemas at: https://standard.open-contracting.org/latest/en/schema/release_package/ and https://standard.open-contracting.org/latest/en/schema/record_package/

OCDSDF 4	The OCDS JSON data published by the e-GP system must follow the I-JSON (Internet JSON) specification from RFC7493 (https://tools.ietf.org/html/rfc7493), which requires UTF-8 encoding (https://en.wikipedia.org/wiki/UTF-8).
OCDSDF 5	The e-GP system must publish OCDS data in CSV and/or Excel formats, as agreed with the Purchaser. CSV and Excel format OCDS data published by the e-GP system must follow the OCDS serialisation guidance: https://standard.open-contracting.org/latest/en/guidance/build/serialization/#csv

Part B.2 OCDS Data Quality General Requirements

Note to the Purchaser (delete from final document) - All OCDS publications must meet the basic quality criteria. The following section expresses the criteria as requirements.

For more information on data quality in OCDS, see
https://standard.open-contracting.org/latest/en/getting_started/quality.

REF	DESCRIPTION OF REQUIREMENT
OCDS DQ 1	The OCDS data published by the e-GP system must be registered: the data must use a registered ocid prefix. For more information, see: https://standard.open-contracting.org/latest/en/schema/identifiers/#contracting-process-identifier-ocid
OCDS DQ 2	The OCDS data published by the e-GP system must be discoverable: it must be possible to discover the data by navigating a website whose homepage is indexed by popular web search engines.
OCDS DQ 3	The OCDS data published by the e-GP system must be retrievable: it must be possible to automate the download of all the data, either using an HTML page listing bulk download URLs, or using only machine-readable data as input.
OCDS DQ 4	The OCDS data published by the e-GP system must be reviewable: the OCDS Data Review Tool must be able to report results on the data.
OCDS DQ 5	The OCDS data published by the e-GP system must be appropriate: concepts must be published in semantic accordance with the rules of the OCDS (or registered extensions) rather than using a non-OCDS field or code.

Part B.3 OCDS Data Access Methods General Requirements

Note to the Purchaser (delete from final document) - OCDS data can be accessed using different methods. Where resources allow, it is best practice to provide multiple access methods for your data, so that both humans and machines can access it easily. This section includes requirements to publish bulk downloads, individual release and record downloads, and an API.

For more information on access methods in OCDS, see <https://standard.open-contracting.org/latest/en/guidance/build/#establish-your-publication-formats-and-access-methods>

REF	DESCRIPTION OF REQUIREMENT
OCSDSA 1	The e-GP system must publish bulk downloads of all OCDS data. For more information, see: https://standard.open-contracting.org/latest/en/guidance/build/hosting/#bulk-downloads
OCSDSA 2	The e-GP system must provide a URL at which each OCDS release or record can be accessed. For more information, see: https://standard.open-contracting.org/latest/en/guidance/build/hosting/#individual-releases-and-records
OCSDSA 3	<p>The e-GP system must provide API access in a format acceptable to the Purchaser, enabling interactive access to the data in section OCDS 2. The API should include as a minimum a method to access the total number of releases and records, and search methods to access packaged OCDS data using the following parameters:</p> <ol style="list-style-type: none"> a. Open Contracting ID (ocid); b. Procuring Entity; c. Buyer; d. Supplier; e. Value range; f. Classifications for the items; g. Stage of procurement according to OCDS i.e. Planning, Tender, Award, Contract or Implementation; h. Method of procurement i. Release date range <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note to the Purchaser (delete from final document): Add any additional data access requirements here.</p> </div>

For more information, bidders should please visit:

- a. Open Contracting Partnership website www.open-contracting.org
- b. Open Contracting Data Standard: Documentation <https://standard.open-contracting.org>
- c. World Bank e-Procurement Toolkit - Accelerating E-procurement Solutions - Open Contracting Standard Implementation Methodology - www.eprocurementtoolkit.org/sites/default/files/2016-11/OCDS_Implementation_Methodology_0.pdf
- d. Assessing OCDS data quality https://standard.open-contracting.org/latest/en/getting_started/quality/
- e. Data files, APIs and discovery <https://standard.open-contracting.org/latest/en/guidance/build/hosting/>
- f. OCDS Schema Reference <https://standard.open-contracting.org/latest/en/schema/>
- g. Field Level Mapping Template for OCDS 1.1 www.open-contracting.org/resources/ocds-field-level-mapping-template/
- h. Open Contracting Data Standard Implementation Guidance <https://standard.open-contracting.org/latest/en/guidance/>
- i. OCDS Publication Tools and Resources <https://standard.open-contracting.org/latest/en/guidance/build/#build-your-data-pipeline>
- j. Sample OCDS data <https://github.com/open-contracting/sample-data/tree/main/fictional-example/1.1>
- k. OCDS Extensions: structured data beyond the common core of sections and building blocks for describing contracting processes in OCDS <https://standard.open-contracting.org/latest/en/guidance/map/extensions/>

Section C. Detailed functional requirements

Note to the Purchaser (delete from final document) - the following proposed text for the detailed functional requirements should be edited by the Purchaser prior to inserting into the tender document for the e-GP system. The Purchaser should remove any concepts that are not authorized for disclosure or that do not have a parallel in their legal context. Purchasers may add or remove other concepts based on priority.

If evaluating bids on a quality and cost basis, decide how many points to allocate for each OCDS and OCPD item for the technical evaluation.

Delete Part C2. Open Contracting Data Portal (OCPD items) if it is to be purchased separately from the e-GP system i.e. not to be supplied by the supplier of the e-GP system.

Also consider indicating that the requirements are mandatory.

Part C.1: Open Contracting and Open Contracting Data Standard

REF	DESCRIPTION OF REQUIREMENT																	
OCDS 1	The Purchaser retains all rights to publish or distribute the data and documents captured by the e-GP system under an Open Database Licence, or equivalent, to be granted by the Bidder. This licence must also cover publication to third party open contracting portals and prevent any restrictions on the free use of any data or documents published by the Purchaser. For more information, see: https://standard.open-contracting.org/latest/en/guidance/publish/#license-your-data																	
OCDS 2	The e-GP system must capture and publish structured procurement data for the key procurement concepts described in OCDS 2.1 to 2.7.																	
OCDS 2.1	The e-GP system must assign a unique identifier, the ocid, to each contracting process. For each contracting process, the e-GP system must always publish its data under the ocid assigned to it. For example, data from the tender, award and contract stages of the same contracting process must be published under the same ocid.																	
OCDS 2.2	<p>For each party, the e-GP system must capture and publish the following:</p> <table border="1" style="margin-left: 20px;"> <tr><td>Name</td></tr> <tr><td>Organization identifier(s)</td></tr> <tr><td>Role(s) in the contracting process</td></tr> <tr><td>Address</td></tr> <tr><td>Contact point</td></tr> </table> <p>Organization identifiers must be structured according to the guidance at: https://standard.open-contracting.org/latest/en/schema/identifiers/#organization-ids</p> <p>Data for the following parties must be captured and published at the following stages:</p> <table border="1" style="margin-left: 20px;"> <thead> <tr> <th>Stage</th> <th>Party</th> </tr> </thead> <tbody> <tr> <td>Planning</td> <td>Procuring entity Buyer</td> </tr> <tr> <td>Tender</td> <td>Procuring entity Buyer</td> </tr> <tr> <td>Award</td> <td>Procuring entity Buyer Tenderers Suppliers</td> </tr> <tr> <td>Contract</td> <td>Procuring entity Buyer</td> </tr> <tr> <td>Implementation</td> <td>Procuring entity Buyer Payer and payee for spending transactions against the</td> </tr> </tbody> </table>	Name	Organization identifier(s)	Role(s) in the contracting process	Address	Contact point	Stage	Party	Planning	Procuring entity Buyer	Tender	Procuring entity Buyer	Award	Procuring entity Buyer Tenderers Suppliers	Contract	Procuring entity Buyer	Implementation	Procuring entity Buyer Payer and payee for spending transactions against the
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Award	Procuring entity Buyer Tenderers Suppliers																	
Contract	Procuring entity Buyer																	
Implementation	Procuring entity Buyer Payer and payee for spending transactions against the																	

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	contract																										
<p>OCDS 2.3</p>	<p>At the planning stage, the e-GP system must capture and publish:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Open Contracting ID (ocid)</td></tr> <tr><td>Procurement rationale</td></tr> <tr><td>List of milestones in the planning stage</td></tr> <tr><td>Budget reserved for the contracting process</td></tr> <tr><td>Budget project the contracting process forms part of</td></tr> <tr><td>Link to further information on the budget for the contracting process</td></tr> <tr><td>Documents relating to the planning process</td></tr> <tr><td>Tender identifier</td></tr> <tr><td>Description of the tender</td></tr> <tr><td>Status of the tender</td></tr> <tr><td>Items to be procured</td></tr> <tr><td>Classifications for the items to be procured</td></tr> <tr><td>Estimated tender value</td></tr> <tr><td>Procurement method</td></tr> <tr><td>Rationale for the procurement method</td></tr> <tr><td>Category of the object of the procurement</td></tr> <tr><td>Award criteria</td></tr> <tr><td>Submission method for bids</td></tr> <tr><td>Tender period</td></tr> <tr><td>Enquiry period</td></tr> <tr><td>Eligibility criteria for the tender</td></tr> <tr><td>Evaluation and award period</td></tr> <tr><td>Estimated contract period</td></tr> <tr><td>List of other key milestones for the tender stage</td></tr> <tr><td>Documents and attachments related to the tender</td></tr> <tr><td>Project information, using the Projects extension https://extensions.open-contracting.org/en/extensions/project/</td></tr> </table>	Open Contracting ID (ocid)	Procurement rationale	List of milestones in the planning stage	Budget reserved for the contracting process	Budget project the contracting process forms part of	Link to further information on the budget for the contracting process	Documents relating to the planning process	Tender identifier	Description of the tender	Status of the tender	Items to be procured	Classifications for the items to be procured	Estimated tender value	Procurement method	Rationale for the procurement method	Category of the object of the procurement	Award criteria	Submission method for bids	Tender period	Enquiry period	Eligibility criteria for the tender	Evaluation and award period	Estimated contract period	List of other key milestones for the tender stage	Documents and attachments related to the tender	Project information, using the Projects extension https://extensions.open-contracting.org/en/extensions/project/
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Project information, using the Projects extension https://extensions.open-contracting.org/en/extensions/project/																											

	<p>Note to the Purchaser (delete from final document): Add any additional documents or other information required here.</p> <p>The requirement for project information is important if the Purchaser plans to disclose data about infrastructure projects, using the Open Contracting for Infrastructure Data Standards Toolkit (OC4IDS): https://standard.open-contracting.org/infrastructure</p>																						
<p>OCDS 2.4</p>	<p>At the tender stage, the e-GP system must capture and publish:</p> <table border="1" data-bbox="373 546 1367 1617"> <tr><td>Open Contracting ID (ocid)</td></tr> <tr><td>Tender identifier</td></tr> <tr><td>Description of the tender</td></tr> <tr><td>Status of the tender</td></tr> <tr><td>Items to be procured</td></tr> <tr><td>Classifications for the items to be procured</td></tr> <tr><td>Estimated tender value</td></tr> <tr><td>Procurement method</td></tr> <tr><td>Rationale for the procurement method</td></tr> <tr><td>Category of the object of the procurement</td></tr> <tr><td>Award criteria</td></tr> <tr><td>Submission method for bids</td></tr> <tr><td>Tender period</td></tr> <tr><td>Enquiry period</td></tr> <tr><td>Whether enquiries were received</td></tr> <tr><td>Eligibility criteria for the tender</td></tr> <tr><td>Evaluation and award period</td></tr> <tr><td>Estimated contract period</td></tr> <tr><td>List of other key milestones for the tender stage</td></tr> <tr><td>Documents and attachments related to the tender</td></tr> <tr><td>Amendments to the tender</td></tr> <tr><td>The location where activity related to this tender will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/</td></tr> </table> <p>Note to the Purchaser (delete from final document): Add any additional documents or other information required here.</p>	Open Contracting ID (ocid)	Tender identifier	Description of the tender	Status of the tender	Items to be procured	Classifications for the items to be procured	Estimated tender value	Procurement method	Rationale for the procurement method	Category of the object of the procurement	Award criteria	Submission method for bids	Tender period	Enquiry period	Whether enquiries were received	Eligibility criteria for the tender	Evaluation and award period	Estimated contract period	List of other key milestones for the tender stage	Documents and attachments related to the tender	Amendments to the tender	The location where activity related to this tender will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/
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<p>OCDS 2.5</p>	<p>At the awards stage, the e-GP system must capture and publish:</p> <table border="1" data-bbox="373 1837 1367 1885"> <tr><td>Open Contracting ID (ocid)</td></tr> </table>	Open Contracting ID (ocid)																					
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	<table border="1"> <tr><td>Bidder identifiers and bid prices for winning bidder/s & losing bidders.</td></tr> <tr><td>Award identifier</td></tr> <tr><td>Description of award</td></tr> <tr><td>Award status</td></tr> <tr><td>Award date</td></tr> <tr><td>Award value</td></tr> <tr><td>Items awarded</td></tr> <tr><td>Classifications for the items awarded</td></tr> <tr><td>Period of the contract</td></tr> <tr><td>Documents and attachments related to the award</td></tr> <tr><td>Amendments to the award of the contract</td></tr> <tr><td>The location where activity related to this award will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/</td></tr> </table> <p>Note to the Purchaser (delete from final document): Add any additional documents or other information required here.</p>	Bidder identifiers and bid prices for winning bidder/s & losing bidders.	Award identifier	Description of award	Award status	Award date	Award value	Items awarded	Classifications for the items awarded	Period of the contract	Documents and attachments related to the award	Amendments to the award of the contract	The location where activity related to this award will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/		
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The location where activity related to this award will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/															
<p>OCDS 2.6</p>	<p>At the contract stage, the e-GP system must capture and publish:</p> <table border="1"> <tr><td>Open Contracting ID (ocid)</td></tr> <tr><td>Contract identifier</td></tr> <tr><td>Identifier for the award which resulted in the contract</td></tr> <tr><td>Description of contract</td></tr> <tr><td>Contract status</td></tr> <tr><td>Contract period</td></tr> <tr><td>Contract value</td></tr> <tr><td>Contracted items</td></tr> <tr><td>Classifications for the items in the contract</td></tr> <tr><td>Date the contract was signed</td></tr> <tr><td>List of other key milestones for the contract</td></tr> <tr><td>Documents and attachments related to the contract</td></tr> <tr><td>List of key milestones for contract implementation</td></tr> <tr><td>The location where activity related to this contract will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/</td></tr> </table> <p>Note to the Purchaser (delete from final document):</p>	Open Contracting ID (ocid)	Contract identifier	Identifier for the award which resulted in the contract	Description of contract	Contract status	Contract period	Contract value	Contracted items	Classifications for the items in the contract	Date the contract was signed	List of other key milestones for the contract	Documents and attachments related to the contract	List of key milestones for contract implementation	The location where activity related to this contract will take place, using the Location extension https://extensions.open-contracting.org/en/extensions/location/
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	<p><i>Add any additional documents or other information required here.</i></p>											
<p>OCDS 2.7</p>	<p>At the implementation stage, the e-GP system must capture and publish:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Open Contracting ID (ocid)</td></tr> <tr><td>Date and value of spending transactions against the contract</td></tr> <tr><td>Payer and payee for spending transactions against the contract</td></tr> <tr><td>Links to further information on spending transactions against the contract</td></tr> <tr><td>List of key milestones for contract implementation</td></tr> <tr><td>Status of contract implementation milestones</td></tr> <tr><td>Documents and reports that are part of the implementation phase</td></tr> <tr><td>Rationale for amendments to the contract</td></tr> <tr><td>Amendments to the contract period</td></tr> <tr><td>Amendments to the contract value</td></tr> <tr><td>Amendments to contract items or terms</td></tr> </table> <div style="border: 2px solid black; padding: 5px; margin-top: 10px;"> <p>Note to the Purchaser (delete from final document): <i>Add any additional documents or other information required here.</i></p> </div>	Open Contracting ID (ocid)	Date and value of spending transactions against the contract	Payer and payee for spending transactions against the contract	Links to further information on spending transactions against the contract	List of key milestones for contract implementation	Status of contract implementation milestones	Documents and reports that are part of the implementation phase	Rationale for amendments to the contract	Amendments to the contract period	Amendments to the contract value	Amendments to contract items or terms
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<p>OCDS 3</p>	<p>The e-GP system must publish data according to the OCDS releases and records model: https://standard.open-contracting.org/latest/en/getting_started/releases_and_records/</p> <p>Whenever the e-GP system updates the public information about a procurement process (for example, whenever it creates or updates a public notice), it must generate a corresponding OCDS release and update the relevant OCDS record.</p>											
<p>OCDS 4</p>	<p>If the e-GP system captures structured procurement data that cannot be mapped to a field in the OCDS schema or an OCDS extension, and if this data can be published, then it should be included in the OCDS data, and the Bidder should create an OCDS extension to document the new fields, as described at: https://standard.open-contracting.org/latest/en/guidance/map/#extensions</p>											
<p>OCDS 5</p>	<p>The e-GP system must be able to accommodate changes to the OCDS schema and future versions of OCDS over the lifetime of the use of the e-GP system.</p> <p>The Bidder should provide the option to upgrade the e-GP system to the latest version of OCDS within 12 months of the release of a new major or minor version of OCDS.</p>											
<p>OCDS 6</p>	<p>The e-GP system must publish any documents associated with contracting processes at persistent URLs, referenced in the OCDS data. Links to documents and attachments must not require users to register or complete a CAPTCHA.</p> <p>As a minimum the following documents should be published:</p> <ol style="list-style-type: none"> a. Notice of planned procurement b. Procurement plan c. Tender notice 											

	<ul style="list-style-type: none"> d. Bidding documents e. Technical specifications f. Evaluation criteria g. Award notice h. Contract notice i. Signed contract j. Completion certificate <p>The OCDS describes the documents recommended for disclosure at each stage of the contracting process at: https://standard.open-contracting.org/latest/en/schema/codelists/#document-type</p> <div style="border: 1px solid black; padding: 5px;"> <p>Note to the Purchaser (delete from final document): <i>add any additional documents or other information required here</i></p> </div>
OCDS 7	<p>The e-GP system must provide a data guide for users in the form of a publication policy. The policy ought to be made available as a public web page, with links to the policy added to OCDS release packages and record packages and any OCDS web portal. For more information, see: https://standard.open-contracting.org/latest/en/guidance/publish/#finalize-your-publication-policy</p>
OCDS 8	<p>The Bidder must document the mapping from the internal data representation in the e-GP system to OCDS fields and codes. The Bidder can use the OCDS 1.1 Field-Level Mapping Template to document the mapping, or equivalent, available at: https://www.open-contracting.org/resources/ocds-field-level-mapping-template/</p>

Part C.2. Open Contracting Data Portal

Note to the Purchaser (delete from final document) - The requirement for the Bidder to supply an Open Contracting Data Portal as part of the contract for the e-GP system is to be determined by the Purchaser and OCDP references and requirements should be deleted if an Open Contracting Data Portal is not to be included in the subsequent contract for the e-GP System e.g. if the Purchaser prefers for third parties to supply an Open Contracting Data Portal based on data and documents captured and published by the e-GP system.

REF	DESCRIPTION OF REQUIREMENT
OCDP 1	<p>The Open Contracting Data Portal must, as a minimum, publish the following Open Contracting and procurement performance reports:</p> <ul style="list-style-type: none"> a. Average number of bidding document purchases and number of bid submissions; b. Average number of bids per tender; c. Number and percentage of open tendering/total number of tenders; d. Time between notification of contract award and contract signature; e. Number of amendments or extensions to contract duration (per contracting process); f. Number of days to complete a procurement process (per contracting process); g. Award statistics for a firm; h. Award statistics by entity; i. Award statistics by amount; j. Ranking by supplier country (by top-level classifications for the items to be procured, per contracting process); k. Ranking by winning bidders/suppliers (by top-level classifications for the items to be procured, per contracting process); l. Awards by geographic region of delivery location; m. Locations e.g. city, town or village of all suppliers (by contract value and number of contracts); n. Locations of suppliers for particular municipalities, in other words, whether most of the contracts are awarded to companies in their locality, which may be of interest in terms of local business development; <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note to the Purchaser (delete from final document): This section should be edited depending on the Purchaser's needs and taking into account the fields included in OCDS 2. Indicators that can be calculated from OCDS data are described at: https://www.open-contracting.org/resources/indicators-to-diagnose-the-performance-of-a-procurement-market/ Note that Items l, m and n are only possible to calculate if location information is captured at tender, award and/or contract stages.</p> </div>
OCDP 2	<p>The portal should provide business intelligence features such as visualization of OCDS data using graphical tools based on best practices on Open Contracting implemented in other countries. For examples, please see Section 4.3.</p>

4. Introduction to Open Contracting

4.1 Open Contracting

Every third dollar spent by governments is with a private company to deliver vital goods, works and services to citizens.

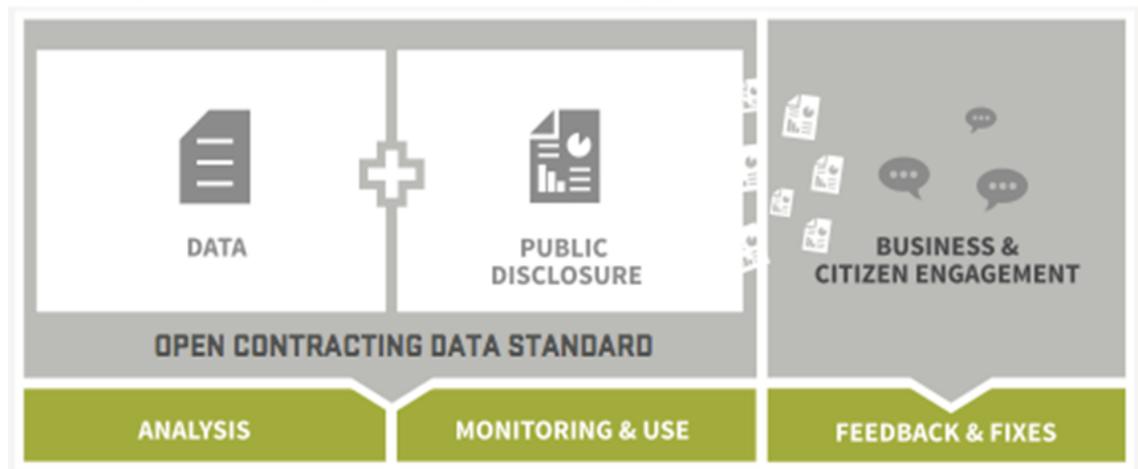
This spending - some US\$9.5 trillion and 15% of global GDP every year - is the bricks and mortar of public benefit, turning taxpayer money into the schools, roads and hospitals that citizens care about.

Openness, accountability and innovation are central to creating and maintaining trust in this huge market. Inefficiency, waste and fraud are major risks.

Research, global business surveys and country reforms show that better data and oversight are good for public integrity, value for money and competition. A World Bank survey of 34,000 companies in 88 countries showed that competition was higher and kickbacks were fewer and smaller in places where transparent procurement, independent complaint & external auditing are in place.

Open contracting is about publishing and using open, accessible and timely information on government contracting to engage citizens and businesses in identifying and fixing problems.

Figure 4 - Open Contracting - Data, Disclosure and Engagement



It can drive systemic change by embedding joined-up information, user engagement and feedback along the entire chain of public contracting. It can help track information from planning to tendering to the award and implementation of public contracts.

Publishing and using structured and standardized information about public contracting is more than just about transparency and it can help stakeholders to:

- deliver better value for money for governments;
- create fairer competition and a level playing field for business, especially smaller firms;
- drive higher-quality goods, works, and services for citizens;
- prevent fraud and corruption;
- promote smarter analysis and better solutions for public problems.

This public access to open contracting data builds trust and ensures that the trillions of dollars spent by governments results in better services, goods, and infrastructure projects

4.2 Open Contracting Data Standard

The OCDS enables disclosure of data and documents at all stages of the contracting process by defining a common data model. It is openly licensed and was created to support organizations to increase contracting transparency, and allow deeper analysis of contracting data by a wide range of users.

OCDS provides:

- A set of recommended fields to disclose;
- A common model for exporting structured data;
- An approach to regular publication of updates and summary data about contracting processes.

OCDS can be used to make sure that e-GP systems collect the information required for disclosure at each stage of the contracting process.

Using OCDS for disclosure in an e-GP system can help to improve the quality and quantity of joined up procurement data available to governments. This data can be used for planning, performance monitoring, auditing and supervision and can help drive improvements in efficiency and transparency as shown in Figure 3.

Open contracting is a journey and publishing OCDS data from an e-GP system is only one step on that journey. Collaboration and engagement with those who use the information should underpin every open contracting initiative. The requirements in this document are generic and should be adopted to meet the needs of data users in your country, whether they are government officials, private companies, civil society organizations, citizens or journalists. Guidance on the process of implementing open contracting, from setting goals and priorities to measuring impact, is available on the OCP website: www.open-contracting.org/implement

4.3 Open Contracting Data Portal

An Open Contracting Data Portal is a publicly accessible website that presents analysis of open contracting data in an easy to understand format and enables citizens, businesses and civil society to access, analyse and use information concerning public contracts.

It can be an integral part of an e-GP system, supplied by the e-GP vendor, or may be a separate third party developed system that uses OCDS data and documents captured and published by an e-GP system.

Features of the portal can include:

- Search tools and filters;
- Download of open contracting data and documents e.g. copies of contracts;

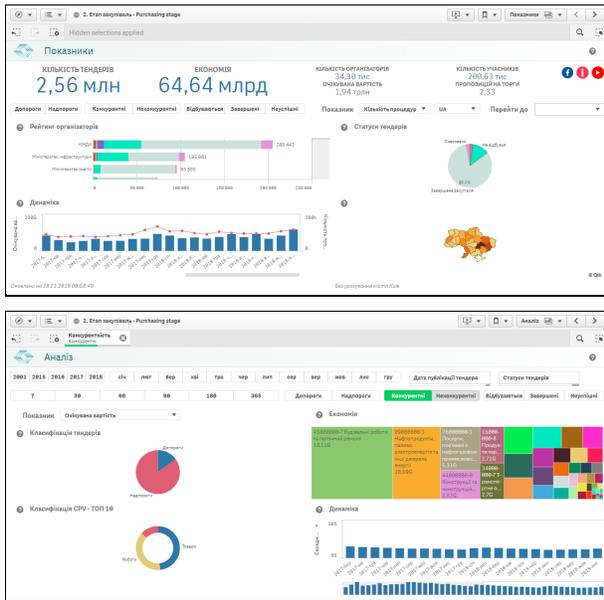
- Business intelligence features such as calculation of indicators based on OCDS data, visualisation of OCDS data using graphical tools, maps plotting the location of procuring entities and suppliers etc, number of contracts awarded to a supplier by a procuring entity.

Examples of Open Contracting Data Portals

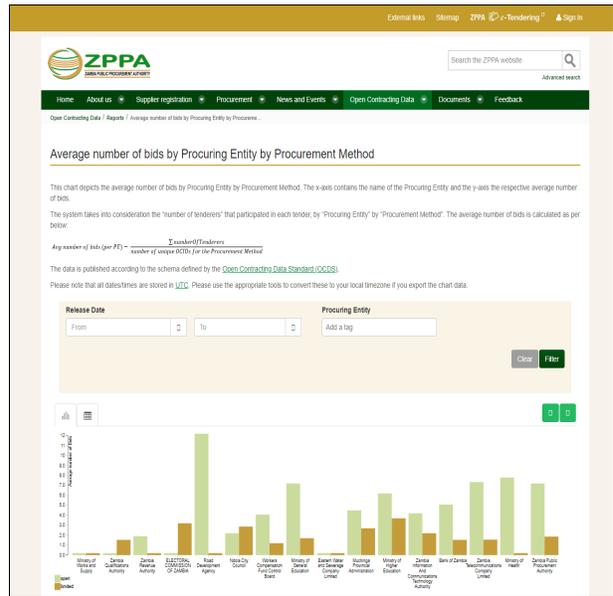
Good examples of Open Contracting Data Portals are provided in Figure 5. For other examples of Open Contracting Procurement Portals, visit: <https://www.open-contracting.org/worldwide>

Figure 5 - Sample Open Contracting Portals

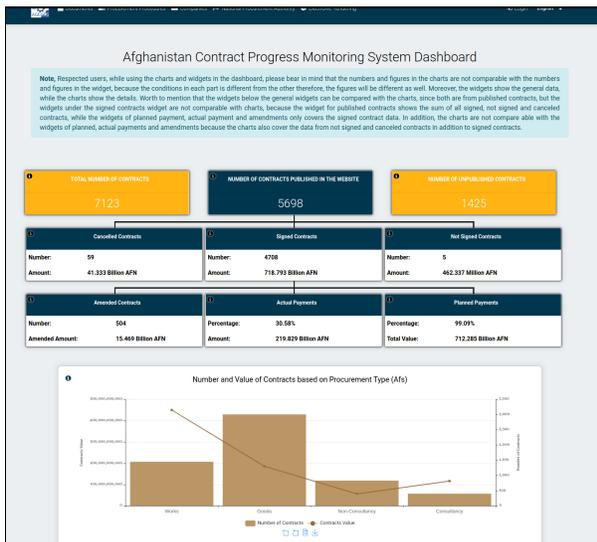
Ukraine: Prozorro
<http://bi.prozorro.org>



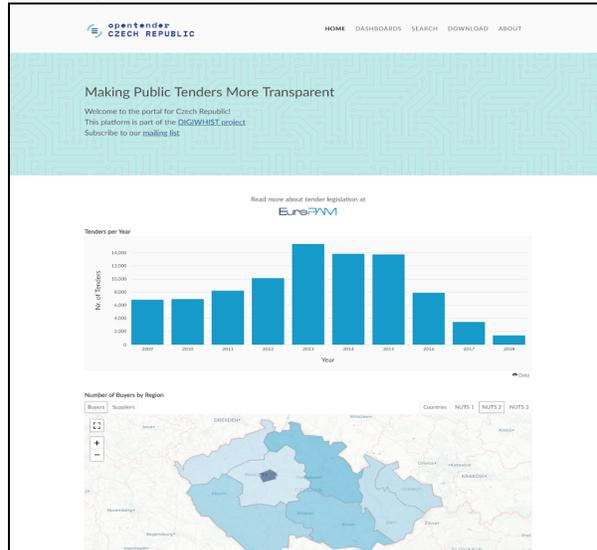
Zambia
<https://www.zppa.org.zm/ocds-data>



Afghanistan
<https://ageops.net/>



Digiwhist: EU Open Tender and Scrapers
<https://opentender.eu>



5. How to obtain further information and help

5.1 Open Contracting Partnership

This document has been prepared by the Open Contracting Partnership and further information and advice can be obtained concerning Open Contracting, the Open Contracting Data Standard and the e-GP OCDS template from:

Open Contracting Partnership,
641 S Street NW, 20001 Washington, D.C., USA
Email: engage@open-contracting.org
www.open-contracting.org

OCDS Documentation

Full documentation of OCDS is available at: <https://standard.open-contracting.org>

OCDS Helpdesk

The Open Contracting Partnership funds a free global Helpdesk to provide support to publishers and users of OCDS data. <https://standard.open-contracting.org/latest/en/support/#ocds-helpdesk>

You can contact the helpdesk at data@open-contracting.org.

Open Contracting impact stories

More than 30 countries, from Argentina to Zambia, are pursuing open contracting reforms. It takes hard work, political will, technical skills and sustained engagement.

Here we tell stories from around the world that show how open contracting is changing lives — from value for money to value for many. www.open-contracting.org/impact-stories/

Open Contracting Community

The Open Contracting community is also a good source of input and support. You can ask questions, discuss ideas for using the standard, and share news on your projects on the mailing list at: standard-discuss@open-contracting.org

Report on Mythbusting Confidentiality In Public Contracting

There is growing evidence that transparency and openness around public contracting can help improve the competitiveness, integrity and efficiency of the contracting process. This commitment to disclosure is not simply “transparency for transparency’s sake” but contains usable, actionable information that governments themselves would benefit from and that businesses and civic actors can also use if open channels for feedback exist.

Not everyone agrees. Concern around the confidentiality of information in the contracts themselves is arguably one of the greatest barriers to more openness. Apprehension over what is and is not confidential creates inertia. It hinders experimentation in how best to engage business and civil society in the contracting process and how to share information about the process in more user-friendly and accessible ways.

This report seeks to unpack and, where possible, unpick those concerns.

www.open-contracting.org/wp-content/uploads/2018/07/OCP18-Mythbusting.pdf

5.2 Other resources about e-GP and Open Contracting

World Bank

The World Bank has produced an online e-Procurement Toolkit for Accelerating E-procurement Solutions which includes a comprehensive range of e-GP guides to assist governments planning or implementing e-GP projects and these can be found at www.eprocurementtoolkit.org. It covers:

1. E-Procurement Preparation;
2. Open Contracting Standard Implementation Methodology;
3. Public Procurement Indicators;
4. Guidelines for Conducting Market Analysis for e-Procurement Systems;
5. Template for developing functional requirements for an e-Procurement system.

The Toolkit offers additional advice and template requirements for procuring e-GP systems, and its [Open Contracting Data Standard Implementation Methodology](#) has guidance relevant to OCDS in e-GP systems from section 3.2.3 on page 27 onwards. (Note: Its earlier sections are based on OCDS 1.0.0.)

Open Learning Campus: E-Procurement eLearning (Self-Paced)

<https://olc.worldbank.org/content/e-procurement-learning-self-paced>

GovTech Procurement Practice Note: Recommendations to World Bank teams and client countries on how to assess and prepare for the application of GovTech systems (technology to support government operations, service delivery, and transparency).

<https://openknowledge.worldbank.org/handle/10986/35067>

European Bank For Reconstruction and Development

Are you ready for eProcurement? Guide to Electronic Procurement Reform - 2015

www.ebrd.com/documents/legal-reform/guide-to-e-procurement-reform.pdf

Asian Development Bank

e-Government Procurement Handbook - 2013

www.adb.org/documents/e-government-procurement-handbook

E-Procurement – Guidance Note on Procurement Business Guide - 2018
www.adb.org/documents/eprocurement

ADB e-GP Web Portal <https://e-gp.adb.org/>

Inter-American Government Procurement Network

<http://ricg.org/compras-electronicas/contenido/451/es/>

European Commission

https://ec.europa.eu/growth/single-market/public-procurement/e-procurement_en

Open Government Partnership (OGP)

The OGP brings together government reformers and civil society leaders to create action plans that make governments more inclusive, responsive and accountable. www.opengovpartnership.org

Guidance on writing RFPs

Harvard

Kennedy School of Government Guidebook: Crafting a Results-Driven Request for Proposals (RFP)
<https://govlab.hks.harvard.edu/guidebook-crafting-results-driven-request-proposals-rfp>

World Commerce & Contracting

Contract Design Pattern Library: an ongoing collection of contract design patterns – effective, repeatable solutions to commonly occurring usability and understandability problems in contracts.
<https://contract-design.worldcc.com>