eForms implementation

Part III : eForms IDs

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Agenda

1. General overview
2. Regulation and other Identifiers
3. Why dropping « *XYZ Lot ID* »?
4. Schemes
5. Values
6. Conclusion

General Overview
Identifiers (1/2)

- <u>Purpose</u>
  - **Univocally** *(i.e. without ambiguity)* **identify some objects** *(e.g. Procedure, Organisation, Lot, Tender …)*
    - to easily refer to these objects *(with the use of the Identifier only)*
    - to easily retrieve related information *(e.g. get all notices related to a same procedure, get all conditions related to a given lot)*

- <u>Constraints</u>
  - **Following some predefined rules**
    - Commonly shared (e.g. schemes for Lot ID / BT-137)
    - Locally defined (e.g. Lot internal ID / BT-22)

General Overview

Identifiers (2/2)

- <u>Usage</u>
  - **In the XML instance**
    - Associated with a schemeName when it exists, is known and required.

- <u>Applicable controls</u>
  - Unicity within the notice, within the notices collection
  - Format compliance to a predefined scheme

Regulation & other Identifiers

a) Regulation Annex

IDs in the notice

- Procedure Identifier (BT-04)
- Notice Identifier (BT-701)
- Notice Version (BT-757)
- Organisation Identifier (BT-501)
- Purpose Lot Identifier (BT-137)
- Internal Identifier (BT-22)
- Tender Identifier (BT-3201)
- Contract Identifier (BT-150)

References to IDs in the notice

- Unpublished Identifier (BT-195)
- Previous Planning Lot Identifier (BT-1371)
- Group Identifier (BT-330)
- Organisation Notice Section Identifier (BT-13720)
- Group Framework Estimated Maximum Value Lot Identifier (BT-557)
- Place Performance Lot Identifier (BT-1372)
- Duration Lot Identifier (BT-1373)
- Funds Lot Identifier (BT-1374)
- Group Lot Identifier (BT-1375)
- Second Stage Lot Identifier (BT-1376)
- Rewards Lot Identifier (BT-1377)
- Selection Lot Identifier (BT-1378)
- Requirements Lot Identifier (BT-1379)
- Terms Lot Identifier (BT-13717)
- Award Criteria Lot Identifier (BT-13710)
- Techniques Lot Identifier (BT-13711)
- Communication Lot Identifier (BT-13712)
- Documents Lot Identifier (BT-13718)
- Submission Lot Identifier (BT-13719)
- Group Framework Value Lot Identifier (BT-556)
- Result Lot Identifier (BT-13713)
- Tender Lot Identifier (BT-13714)
- Contract Tender Identifier (BT-3202)
- Strategic Procurement Notice Section Identifier (BT-13721)
- Buyer Review Lot Identifier (BT-13722)
- Additional Information Lot Identifier (BT-13715)

References to IDs outside the notice

- Contract EU Funds Identifier (BT-5011)
- Previous Planning Identifier (BT-125)
- Previous Planning Part Identifier (BT-1251)
- Direct Award Justification Previous Procedure Identifier (BT-1252)
- Modification Previous Notice Section Identifier (BT-1501)
- Change Previous Notice Section Identifier (BT-13716)
- Change Notice Version Identifier (BT-758)

Regulation & other Identifiers

b) UBL extra IDs

Element	Purpose
Identifier	
UBL Version	UBL version on which the schema has been developed
Customization ID	Version of the customization
Reference	
Framework Notice ID	Notice that established the FA used in the current notice
Document reference IDs	UBL required ID, opportunity for referring to Legislation documents
Notice reference ID	Refer a notice not having a Procedure ID (e.g. TEDXML notices)

Regulation & other Identifiers

c) Dropped IDs

- Previous Planning Lot Identifier (BT-1371)
- Organisation Notice Section Identifier (BT-13720)
- Group Framework Estimated Maximum Value Lot Identifier (BT-557)
- Place Performance Lot Identifier (BT-1372)
- Duration Lot Identifier (BT-1373)
- Funds Lot Identifier (BT-1374)
- Second Stage Lot Identifier (BT-1376)
- Rewards Lot Identifier (BT-1377)
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- Tender Lot Identifier (BT-13714)
- Contract Tender Identifier (BT-3202)
- Strategic Procurement Notice Section Identifier (BT-13721)
- Buyer Review Lot Identifier (BT-13722)
- Additional Information Lot Identifier (BT-13715)

Lot

Identifier (BT-137)

Tendering Terms

- Selection Criteria; Second Stage Invite Criteria; Variants; EU funds; Recurrence; Security Clearance; Financial terms; Financial Guarantee; Procurement documents; Reserved participation; Execution Requirements; Tenderer Requirements; Award Criteria; Awarding Consequences; Jury; Prizes; Processing Parties; Tender Validity; Appeal Terms

Tendering Process

- Statistics;
- Relaunch; Tools; Deadlines; Successive Reductions; GPA; Successive Reduction; Dispatch Dates; Electronic Submission; Previous Planning; Candidates limits; Opening Events; Auction; FA

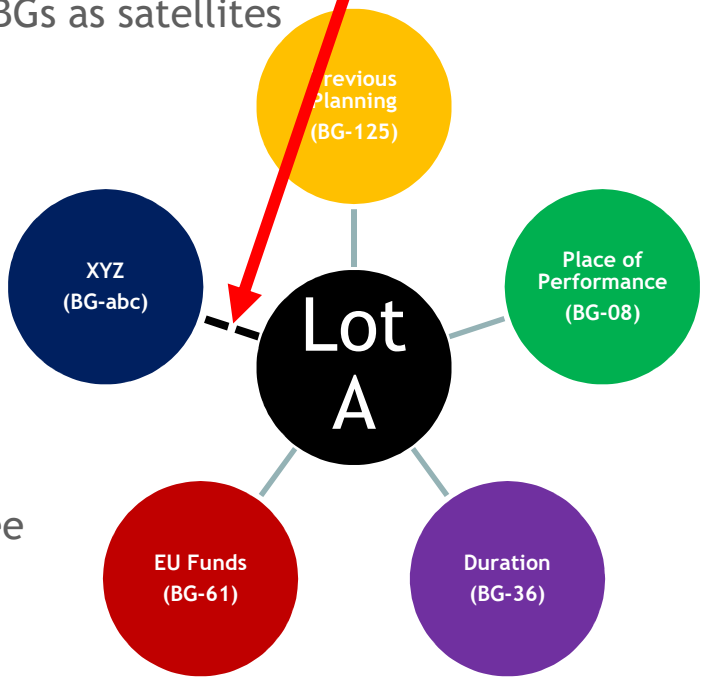
Procurement Project

- IDs; Title; Description; Nature; Procurement Type (Green, Innovative ...); Strategic Procurement; Accessibility; Quantity; Values; Commodities classifications; Place of performance; Planned Period; Options & Renewal.

Why dropping « *XYZ Lot ID* »?

Lot example

Spreadsheet model ~ extended star model with Lots at the center and BGs as satellites



UBL model ~ tree

Schemes

Univocal interpretation and validation

- Different identifiers could be used for a given object
- Most of the time a specific scheme exists, allowing for:
  - Interpretation
  - Pattern control (when it exists and is known)

The scheme name is specified using the « schemeName » attribute of the identifier

Values

Field	Who	Format	How
Procedure Identifier (BT-04)	OP	Up-to 8 digits, no leading zeros	via webservice
Notice Identifier (BT-701)	OP	Up-to 8 digits, no leading zeros	via webservice
Notice Version (BT-757)	Authoring systems/Authors	Up-to 2 digits, no leading zeros, starts at 1	
Organisation Identifier (BT-501)	Authors		
Purpose Lot Identifier (BT-137)	Authoring systems/Authors	LOT-XXXX PAR-XXXX GLO-XXXX	
Internal Identifier (BT-22)	Authors	No limitation but length	
Tender Identifier (BT-3201)	Authors	No limitation but length	
Contract Identifier (BT-150)	Authors	No limitation but length	

Conclusion

- <u>**Numerous Identifiers defined:**</u>
  - For identification (*definition of the ID*), or
  - For reference to internal or external objects (*use of existing ID values*)

- **The need for "IDs" to refer to objects is model dependent** (*i.e. data structure*)

- For IDs, **format and/or values assignment must follow some commonly agreed rules**

- <u>**Questions:**</u>
  - to TED-EVENTS@publications.europa.eu, specifying the subject "Questions for eSenders seminar - eForms Implementation - Part III : eForms IDs".

Thank you