Implementing OCDS

Process, tools and resources
More than 30 national and sub-national governments use OCDS to publish contracting data.
Implementing OCDS
Key resource: OCDS documentation

Used for:

- Introductory materials
- Schema reference documentation
- Implementation guidance

standard.open-contracting.org
Key resource: Implementation section of OCP website

Used for guidance, tools and resources for each stage of the implementation process.

[Image of the OCP website with a diagram titled "The Open Contracting Journey"]

Open contracting is guided by a set of global principles for improving disclosure, data and engagement across the entire chain of public procurement, from planning through to delivery.

Collaboration and engagement with those who use the information should underpin every open contracting intervention.

Here you will find the information, resources, tools and case studies you will need to publish standardized open data about public contracting processes — and how to put this

[Website link: open-contracting.org/implement]
The design stage is about setting your project up for success:

- Set goals and priorities
- Build a team
- Identify and engage with stakeholders
- Make a commitment
The OCDS approach

- Understand the problem: what are you trying to achieve?
- Publish early, and iterate: improving disclosure step-by-step
- Create feedback loops with data users
- Learn from and adopt innovative practices from your peers
Case studies

UK
Pilot with central procurement authority and a major infrastructure project, then adopt as a government standard

Canada
Pilot by converting existing open datasets, then expand scope to cover all data currently collected

Ukraine
Pilot with below threshold procurements, then expand to all procurements
Helpdesk support and resources: Design

Helpdesk support:
- Technical induction calls
- Input into commitments
- Scoping notes

Resources:
- Guide to defining use cases
- Standard discussion group
- Best practices in making a commitment
Implementing OCDS

Step 2: Map

The mapping stage is about understanding the pieces of the puzzle, and finding alignment between data supply, demand and use.

- Systems
- Fields
- Needs
Mapping your systems to OCDS needs a range of different expertise:

- **Technical expertise** to understand the data structures in OCDS and the source data and identify what can be mapped on a technical level.

- **Policy expertise** to understand the definitions in OCDS, identify appropriate mappings to local terminology and identify where policy changes might be needed to fill gaps in the source data.

- **Project management expertise** to understand how the results of the mapping affect the implementation and to identify short and long term goals.
Identifying *where* and *how* contracting data from each stage is stored.
Resource: Technical assessment template

Used to:

- Identify the systems that contain data on different stages of the contracting process
- Map out common identifiers that can be used to bring data together
Field-level mapping

Mapping between **individual fields and codes** in a source systems and OCDS
Resource: Field-level mapping template

Used to document a mapping between each field in existing systems and the OCDS schema.

The template can also be used to map user needs to fields in OCDS.
Provides guidance on using the field-level mapping template, including a worked example.
Gaps

A field level mapping may highlight:

Gaps in data collection
Where OCDS recommends collecting and publishing additional data which is important for users.

Opportunities to collect, or advocate for the disclosure of, additional information which is useful for procurement monitoring.

Gaps in OCDS
Where you collect data but there isn’t a field in OCDS in which to publish the data.

Publish using extensions to the OCDS schema, don’t throw data away.
Extensions

In your mapping you **must** identify the fields and codes in OCDS that are **sufficient** to disclose your information.

If **none are adequate**, you should add an additional field or code to disclose this information.

**Extensions** provide a way to document these additional fields and codes.

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**Bid statistics and details** *(Recommended)*

Allowing bid statistics, and detailed bid information to be represented.

Maintained by [Open Contracting Data Standard Extensions](https://www.open-contracting.org/data-standard/extensions/)

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[Open Contracting Data Standard](https://www.open-contracting.org/data-standard/)
Resource: Extensions explorer

Browse existing extensions using the extensions explorer.

extensions.open-contracting.org
Publication plan

Documenting a publication plan helps to:

● Present a summary of your OCDS mapping to key stakeholders

● Confirm shared understanding of key decisions and publication priorities across an open contracting project team

● Set out the goals that you will measure data publication against

● Explain the technical architecture and development timescales
Resource: Publication plan template

Used to document a publication plan to share with key stakeholders.

OCDS Publication Plan Template

2018 BY OPEN CONTRACTING PARTNERSHIP

A publication plan is a useful resource when you need to:

- Present a summary of your OCDS mapping to key stakeholders;
- Confirm shared understanding of key decisions and decisions

[open-contracting.org/resources/]
Helpdesk support: Mapping stage

- **Provide training calls** on how to map systems, data & user needs, developing publication plans

- **Answer questions** about the OCDS documentation or schema

- **Document issues** on Github if there is doubt about possible extensions or if the partner proposes a change to the standard

- **Review** technical assessments, field-level mappings and publication plans
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Step 3: Build

The build stage is about putting plans into action by developing:

- Data
- Extensions
- Systems
Tool: Data review tool

Used to:

- Check draft data against the OCDS schema
- Get feedback on data quality and changes required for compliance with OCDS
- Get summary statistics and explore data in a visualization

[standard.open-contracting.org/review/](standard.open-contracting.org/review/)
Tool: Extension creator

Used to create and document extensions to the OCDS schema.
Resource: Routes to an OCDS API

This blog provides an overview of the different types of architecture used in OCDS publication systems.
Helpdesk support: Build stage

- Answer questions and signpost resources and tools.
- Provide feedback on draft data
- Review vendor ToRs for developments to systems for OCDS publication
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Step 4: Publish

The publish stage is about making your data accessible to users, considering:

- Licenses
- Formats
- Publication patterns
- Publication policy
Licensing

Open licenses are essential to prevent restrictions on reuse

- Public Domain Dedication

- Attribution Only
Guidance for users

\[ \text{data} + \text{context} = \text{information} \]

- Who is the data provider?
- How is the data generated?
- Exclusions/redactions
- Extensions/codelists
- Future development plans
Resource: publication policy template

Used to document a publication policy, including:

- the purpose of publication
- how the data is generated
- the data’s scope and format
- how the data can be reused
- how the publisher can be contacted

Each OCDS file you publish should link to a publication policy document that explains to users how the data was created, how they should interpret it, how often it is updated, and how to get in touch if they have questions.

A publication policy can also address issues of privacy and confidentiality.

open-contracting.org/resources/
Helpdesk support: publishing

- Answer questions and signpost resources and tools
- Give detailed feedback on the quality of published data
- Provide guidance on data formats, publication patterns and licensing
- Review publication policies
Remember, publishing OCDS data is just the foundation.

Interfaces, tools and services are required for most uses of the data.
Portals, dashboards and BI tools

Not all users have the skills to work with data directly.

Publishing good data is just one part of opening up public contracting.

Reach more people by providing analysis tools built on top of OCDS data.
Paraguay provides visualizations to help users understand the relationship between the different stages of the contracting process.

contrataciones.gov.py/datos/visualizaciones/etapas-licitacion
Examples

zindex.cz benchmarks Czech procuring entities against a range of performance indicators.
The City of Mexico provides a portal which allows users to explore the data and documents available at each stage of the contracting process contratosabiertos.cdmx.gob.mx/contratos
Examples

Prozorro (Ukraine) provide a comprehensive set of public tools to help users monitor and engage with the public contracting, including...

ProZorro is a hybrid electronic open source government e-procurement system created as the result of a partnership between business, government and the civil society.

ProZorro is a fully online public procurement platform and a collaboration environment that ensures open access to public procurement (tenders) in Ukraine. Fully implemented in 2016 as a hybrid (both centralized public and decentralized private marketplaces) system it has since been globally recognized as one of the most innovative public procurement systems delivering government services in a stakeholder-focused, transparent, effective, fair and low-cost way.

Open Contracting Data Standard
Examples

...detailed dashboards with key performance indicators for each stage of the contracting process...

KPIs (announcements from 2018)

- Amount of Plan Subsections: 52,88 bn
- No. of Plan Subsections: 5,21 mln
- % Announced*: 99%
- % with Signed Contracts*: 98%
- No. of Organisers with Plans: 34,72 k
- % Excluded: 2%
- % in the Month of Announcement or After**: 87%
- % after Announcement**: 7%
- % with Changes**: 17%

* % by quantity includes all non-zero plan subsections of all procurement procedures (except procedure “Without procedure”).
** % by quantity includes all non-zero plan subsections. Last Proc Subsection Change Date 20.02.2018
Examples

...public risk indicator analysis...
Examples

...and a public complaints and monitoring tool with guidance on how to monitor public procurement.
We keep track of software tools that can be used to create, use, visualize or analyze OCDS data in the **OCDS tools directory**.

We focus on **re-usable tools** and **open-source code** that can be taken as a starting point for new projects.

We also have a separate list of tools that can serve as **inspiration** when creating new open contracting projects or platforms.

[www.open-contracting.org/resources/open-contracting-tools-directory/](http://www.open-contracting.org/resources/open-contracting-tools-directory/)
Evaluation goes beyond feedback on the data to look at how it is used and to measure and understand impact:

- User feedback
- Baselines and impact data
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Step 7: Learn & Share

- Measure and reflect
- Share stories
- Share code and tools
- Share feedback