

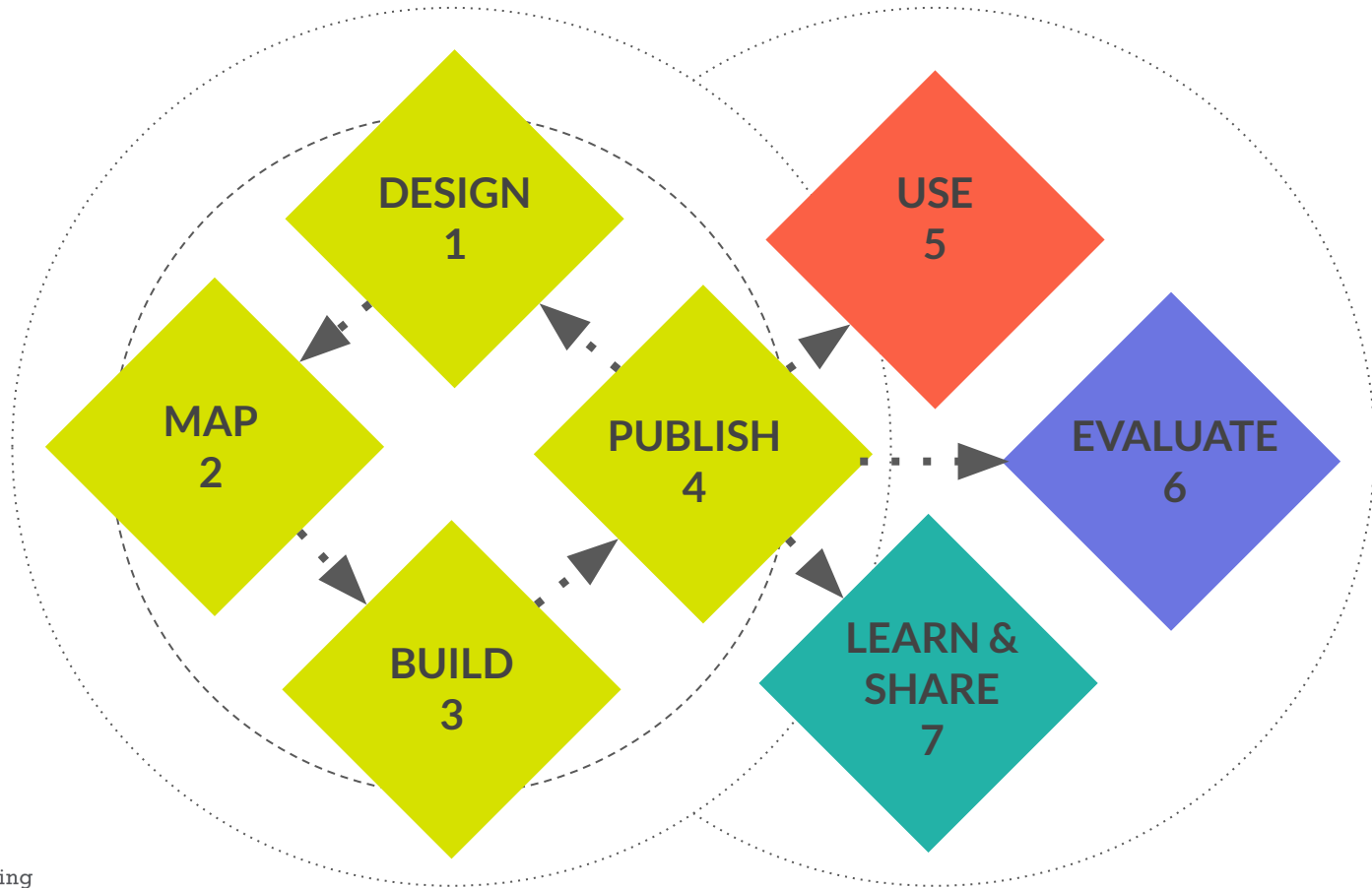
Implementing OCDS

Process, tools and resources

A world map with a light gray background. Several countries are highlighted in a medium blue color. These include Canada, the United States, Mexico, Argentina, Chile, Australia, and various countries in Europe, Africa, and Asia. The text is overlaid on the map.

More than 30 national and sub-national governments use OCDS to publish contracting data.

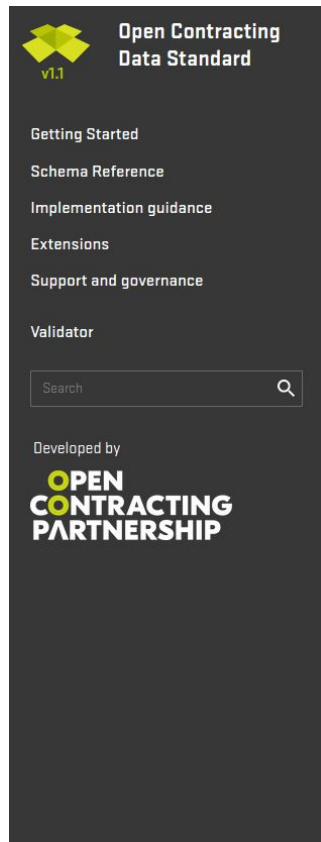
Implementing OCDS



Key resource: OCDS documentation

Used for:

- Introductory materials
- Schema reference documentation
- Implementation guidance



The screenshot shows the top navigation menu of the OCDS v1.1 documentation. It includes links for 'Getting Started', 'Schema Reference', 'Implementation guidance', 'Extensions', and 'Support and governance'. Below these is a 'Validator' section with a search input field. At the bottom, it states 'Developed by' followed by the 'OPEN CONTRACTING PARTNERSHIP' logo.

[Docs](#) » [Open Contracting Data Standard: Documentation](#)

[View page source](#)

Open Contracting Data Standard: Documentation

Governments around the world spend an estimated US\$9.5 trillion through contracts every year. Yet, contracting information is often unavailable for public scrutiny.

The Open Contracting Data Standard (OCDS) enables disclosure of data and documents at all stages of the contracting process by defining a common data model. It was created to support organizations to increase contracting transparency, and allow deeper analysis of contracting data by a wide range of users.

The OCDS approach:

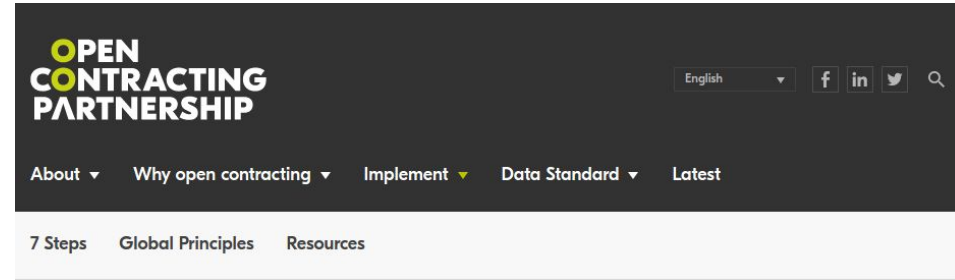
- Publish early, and iterate: improving disclosure step-by-step
- Simple and extensible JSON structure
- Publish data for each step of the contracting process
- Create summary records for an overall contracting process
- Re-usable objects: organizations, tender information, line-items, amounts, milestones, documents etc.
- Recommended data and documents at basic, intermediate & advanced levels
- Common open data publication patterns
- Guidance on improving data collection and data quality
- A growing community of users and range of open source tools

Note

This is the 1.1 release of OCDS, published on 31st May 2017.

Key resource: Implementation section of OCP website

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

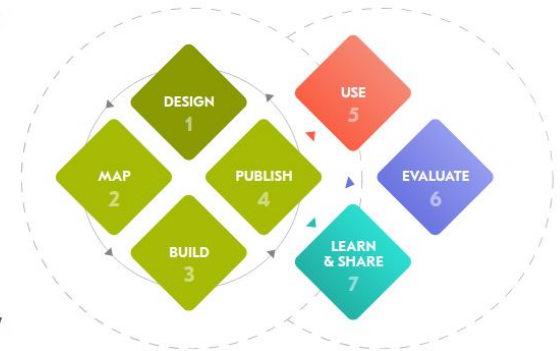


The Open Contracting Journey

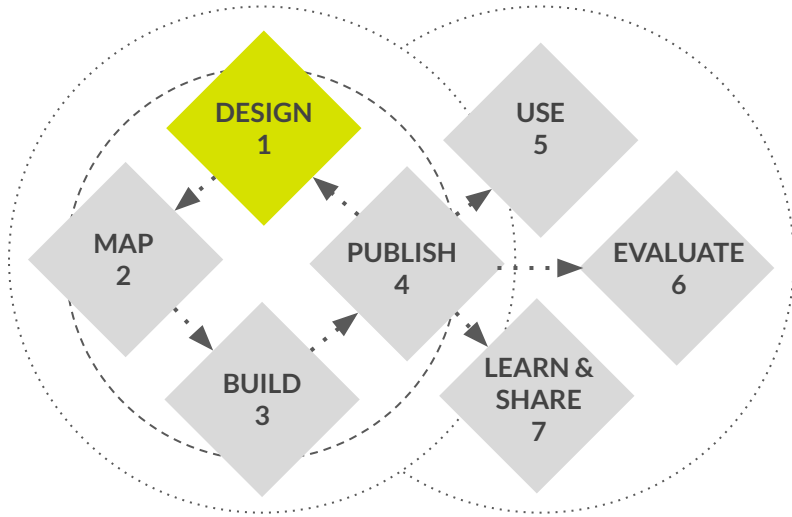
Open contracting is guided by a set of [global principles](#) for improving disclosure, data and engagement across the entire chain of public procurement, from planning through to delivery.

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



Step 1: Design



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

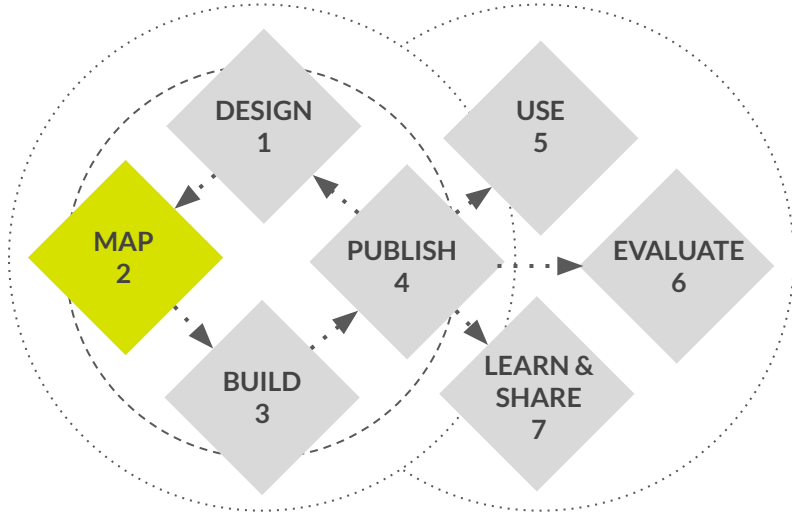
Helpdesk support:

- Technical induction calls
- Input into commitments
- Scoping notes

Resources:

- [Guide to defining use cases](#)
- [Standard discussion group](#)
- [Best practices in making a commitment](#)

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

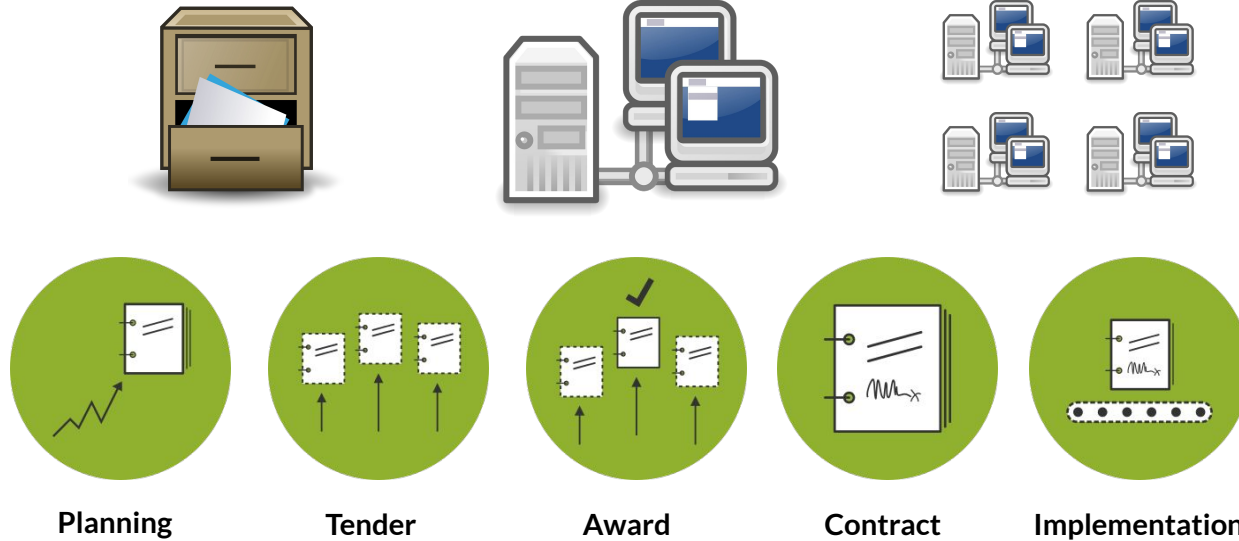
Mapping

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.

System mapping

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



OCDS Technical Assessment Template

2016 BY OPEN CONTRACTING PARTNERSHIP

[View](#)

The Technical Assessment Template is designed to help publishers to identify the systems that contain information on different stages of the contracting process, and to map out common identifiers that can be used to bring data together.

Contact the helpdesk for support with using the template or

open-contracting.org/resources/

Field-level mapping

Mapping between individual fields and codes in a source systems and OCDS

The screenshot shows a 'New Supplier' form with the following fields and labels:

- Company Name (red text)
- Agency Name
- First Name (red text)
- Last Name (red text)
- Gender (radio buttons for M and F)
- Email (with an envelope icon)
- Phone Number (with a phone icon)

A note at the top of the form states: "Fields in red are required". A "Submit" button is located at the bottom right of the form.

Title	Description	Type	Format	Required
id		[string, integer]		Required
Tender ID	An identifier for this tender process. This may be the same as the ocid, or may be drawn from an internally held identifier for this tender.			
title		[string, null]		
Tender title	A title for this tender. This will often be used by applications as a headline to attract interest, and to help analysts understand the nature of this procurement.			
description		[string, null]		
Tender description	A summary description of the tender. This should complement structured information provided using the items array. Descriptions should be short and easy to read. Avoid using ALL CAPS.			

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.



OCDS 1.1 Field Level Mapping Template

2016 BY OPEN CONTRACTING PARTNERSHIP

[View](#)

A key step in any OCDS implementation is to map data fields from existing systems to the OCDS schema.

This OCDS 1.1 Field Level Mapping template is designed to make the process as easy as possible and to ensure that the appropriate data is captured for each stage. Be sure to

open-contracting.org/resources/

Resource: Field-level mapping template guidance

Provides guidance on using the field-level mapping template, including a **worked example**.



2018

OCDS 1.1 Codelist Mapping Template

OCDS 1.1 Mapping Template Guidance

2017 BY OPEN CONTRACTING PARTNERSHIP

View

This guide details a worked example of using the OCDS 1.1 Field Level Mapping Template.

2017

OCDS 1.0 Contact the OCDS Helpdesk for support with using the

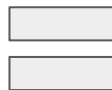
open-contracting.org/resources/

Gaps

A field level mapping may highlight:

Gaps in data collection

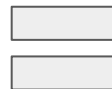
Where OCDS recommends collecting and publishing additional data which is important for users



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.

Bid statistics and details Recommended

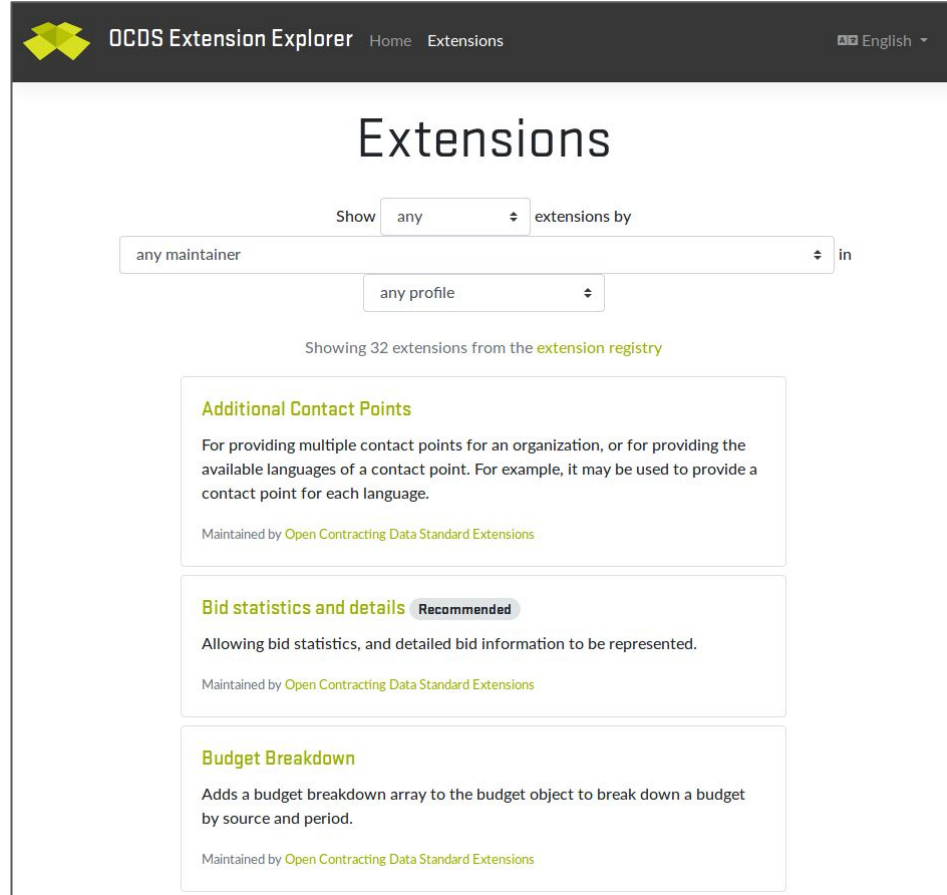
Allowing bid statistics, and detailed bid information to be represented.

Maintained by [Open Contracting Data Standard Extensions](#)

Resource: Extensions explorer

Browse existing extensions using the extensions explorer.

extensions.open-contracting.org



The screenshot shows the OCDS Extension Explorer interface. At the top, there is a navigation bar with the OCDS logo, the text "OCDS Extension Explorer", and links for "Home" and "Extensions". On the right side of the navigation bar, there is a language selector set to "English". The main heading is "Extensions". Below the heading, there are search filters: "Show any" (with a dropdown arrow), "extensions by" (with a dropdown arrow), and "any maintainer" (with a dropdown arrow). Below these filters, there is a search input field containing "any profile" and a dropdown arrow. Below the search filters, it says "Showing 32 extensions from the extension registry". The first extension listed is "Additional Contact Points", which is described as "For providing multiple contact points for an organization, or for providing the available languages of a contact point. For example, it may be used to provide a contact point for each language." and is maintained by "Open Contracting Data Standard Extensions". The second extension is "Bid statistics and details", which is marked as "Recommended" and described as "Allowing bid statistics, and detailed bid information to be represented." and is also maintained by "Open Contracting Data Standard Extensions". The third extension is "Budget Breakdown", described as "Adds a budget breakdown array to the budget object to break down a budget by source and period." and is also maintained by "Open Contracting Data Standard Extensions".

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

[View](#)

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

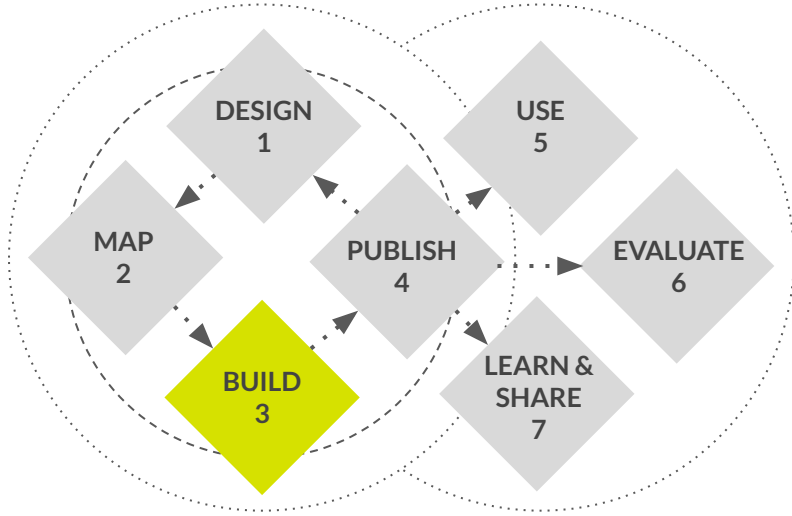
- Present a summary of your OCDS mapping to key stakeholders;
- Confirm shared understanding of key decisions and

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

Step 3: Build



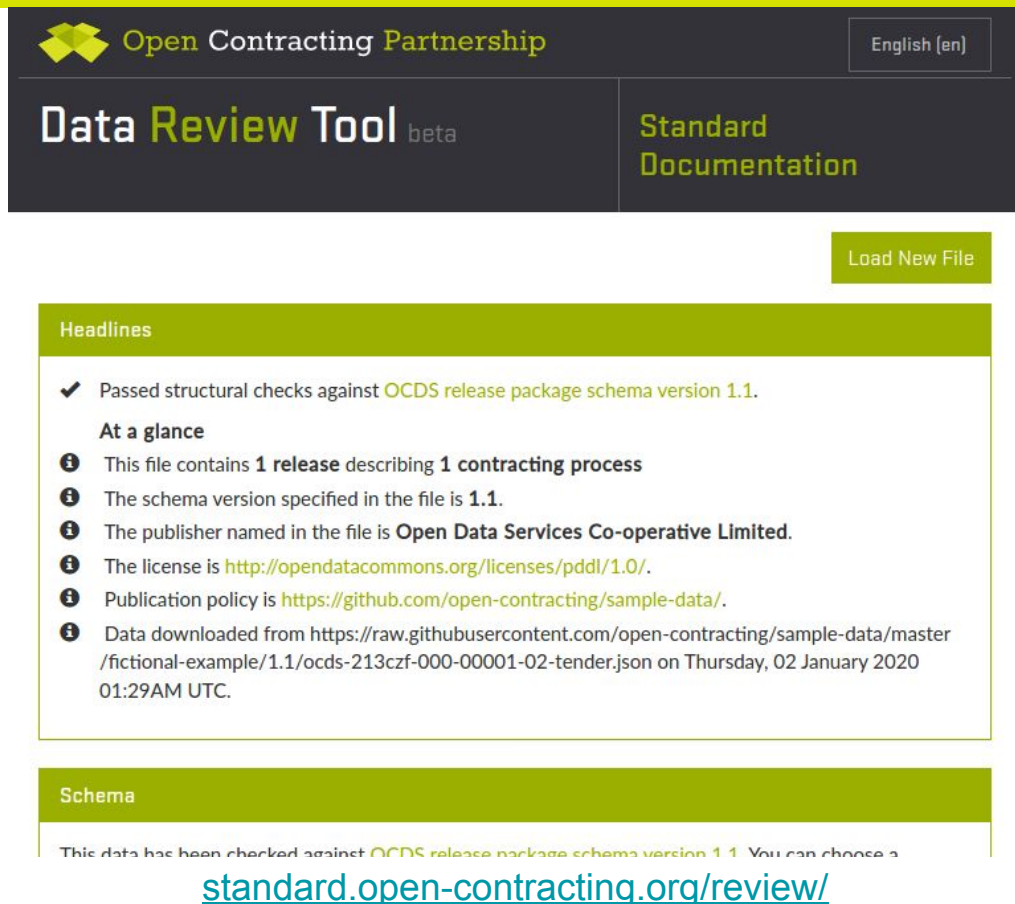
The build stage is about putting plans into action by developing:

- 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



The screenshot shows the Open Contracting Partnership Data Review Tool interface. At the top, there is a navigation bar with the Open Contracting Partnership logo and the text "Open Contracting Partnership". On the right side of the navigation bar, there is a language selector button labeled "English (en)". Below the navigation bar, the main header area contains the text "Data Review Tool" in a large font, with "beta" in a smaller font to its right. To the right of the main header, there is a button labeled "Standard Documentation". Below the header, there is a "Load New File" button. The main content area is divided into two sections: "Headlines" and "Schema". The "Headlines" section has a green header and contains a green checkmark icon followed by the text "Passed structural checks against OCDS release package schema version 1.1." Below this, there is a sub-section titled "At a glance" with a list of information items, each preceded by an information icon (i). The items are: "This file contains 1 release describing 1 contracting process", "The schema version specified in the file is 1.1.", "The publisher named in the file is Open Data Services Co-operative Limited.", "The license is <http://opendatacommons.org/licenses/pddl/1.0/>.", "Publication policy is <https://github.com/open-contracting/sample-data/>.", and "Data downloaded from <https://raw.githubusercontent.com/open-contracting/sample-data/master/fictional-example/1.1/ocds-213czf-000-00001-02-tender.json> on Thursday, 02 January 2020 01:29AM UTC." The "Schema" section has a green header and contains the text "This data has been checked against OCDS release package schema version 1.1. You can choose a" followed by a blue underlined link: standard.open-contracting.org/review/.

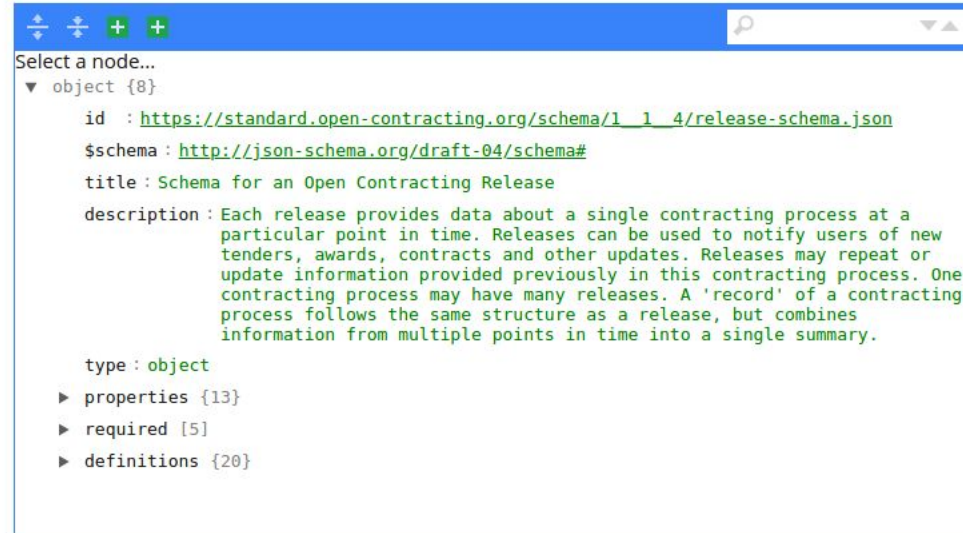
Tool: Extension creator

Used to create and document extensions to the OCDS schema.

OCDS Extension Creator

Source File

release schema 1.1 Upload a file
 No file selected.

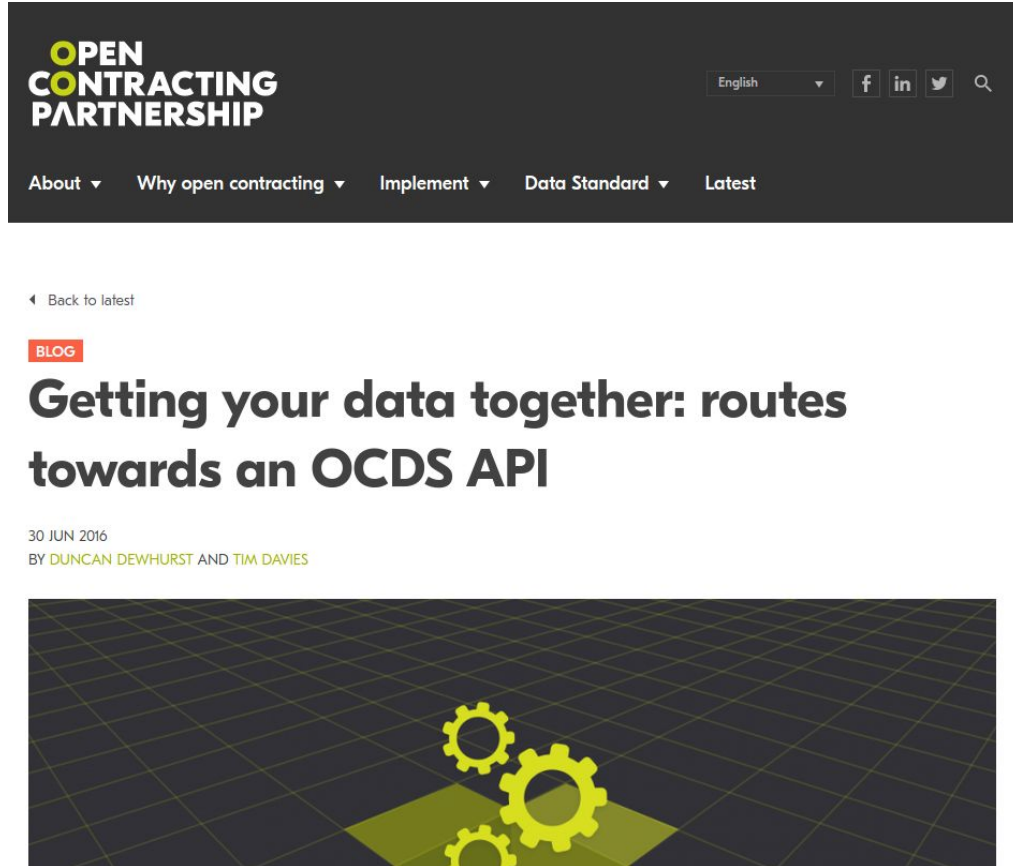


```
Select a node...
▼ object {8}
  id : https://standard.open-contracting.org/schema/1\_1\_4/release-schema.json
  $schema : http://json-schema.org/draft-04/schema#
  title : Schema for an Open Contracting Release
  description : Each release provides data about a single contracting process at a
    particular point in time. Releases can be used to notify users of new
    tenders, awards, contracts and other updates. Releases may repeat or
    update information provided previously in this contracting process. One
    contracting process may have many releases. A 'record' of a contracting
    process follows the same structure as a release, but combines
    information from multiple points in time into a single summary.

  type : object
  ▶ properties {13}
  ▶ required [5]
  ▶ definitions {20}
```

Resource: Routes to an OCDS API

This blog provides an overview of the different types of architecture used in OCDS publication systems.



The screenshot shows the top navigation bar of the Open Contracting Partnership website. The logo 'OPEN CONTRACTING PARTNERSHIP' is on the left. On the right, there is a language dropdown set to 'English', and social media icons for Facebook, LinkedIn, and Twitter. Below the navigation bar, there are menu items: 'About', 'Why open contracting', 'Implement', 'Data Standard', and 'Latest'. A 'Back to latest' link is visible. A red 'BLOG' tag is positioned above the main article title. The article title is 'Getting your data together: routes towards an OCDS API'. Below the title, the date '30 JUN 2016' and the authors 'BY DUNCAN DEWHURST AND TIM DAVIES' are listed. At the bottom of the screenshot, there is a graphic of three interlocking gears on a dark grid background.

OPEN CONTRACTING PARTNERSHIP

English

f in t

About ▾ Why open contracting ▾ Implement ▾ Data Standard ▾ Latest

← Back to latest

BLOG

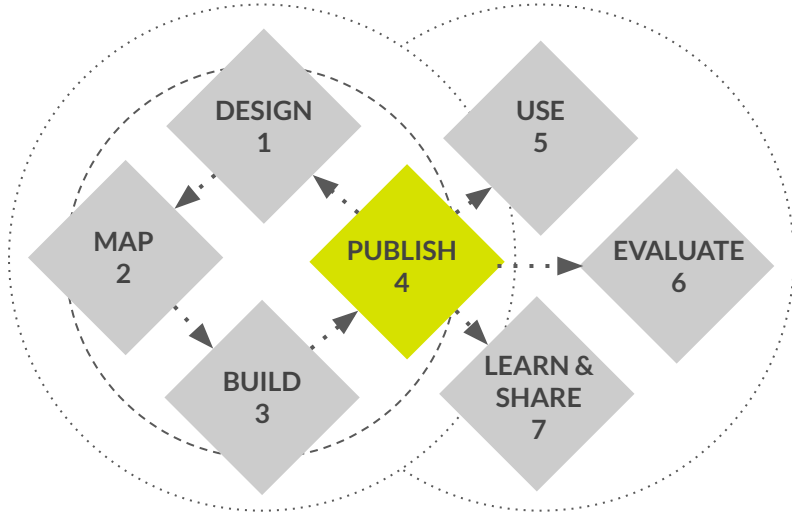
Getting your data together: routes towards an OCDS API

30 JUN 2016
BY DUNCAN DEWHURST AND TIM DAVIES

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

Step 4: Publish



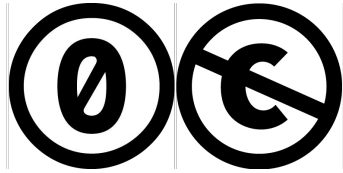
The publish stage is about making your data accessible to users, considering:

- Licenses
- Formats
- Publication patterns
- Publication policy

Licensing

Open licenses are essential to prevent restrictions on reuse

- **Public Domain Dedication**



- **Attribution Only**



Guidance for users

data + context = 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



OCDS 1.1 Publication Policy Template

2019 BY OPEN CONTRACTING PARTNERSHIP

[View](#)

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.

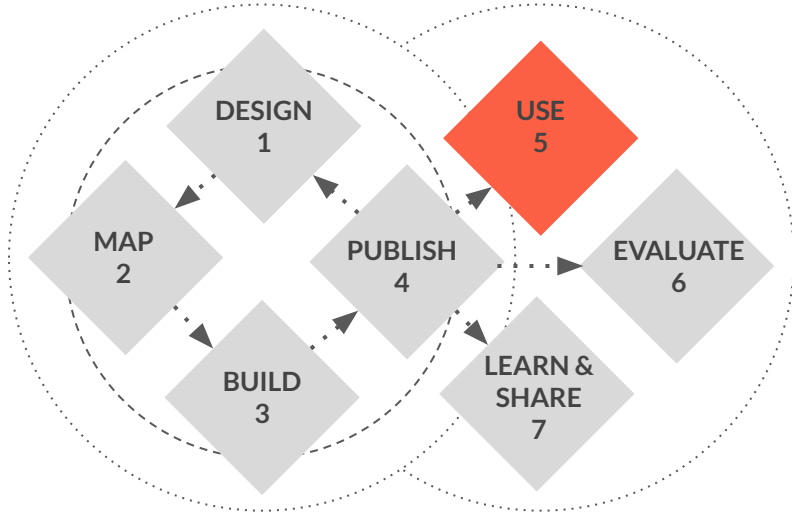
A publication policy can also address issues of privacy and

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

Step 5: Use



Remember, publishing OCDS data is just the foundation.

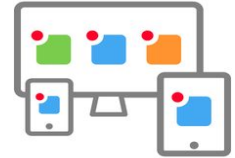
Interfaces, tools and services are required for most uses of the data.

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.

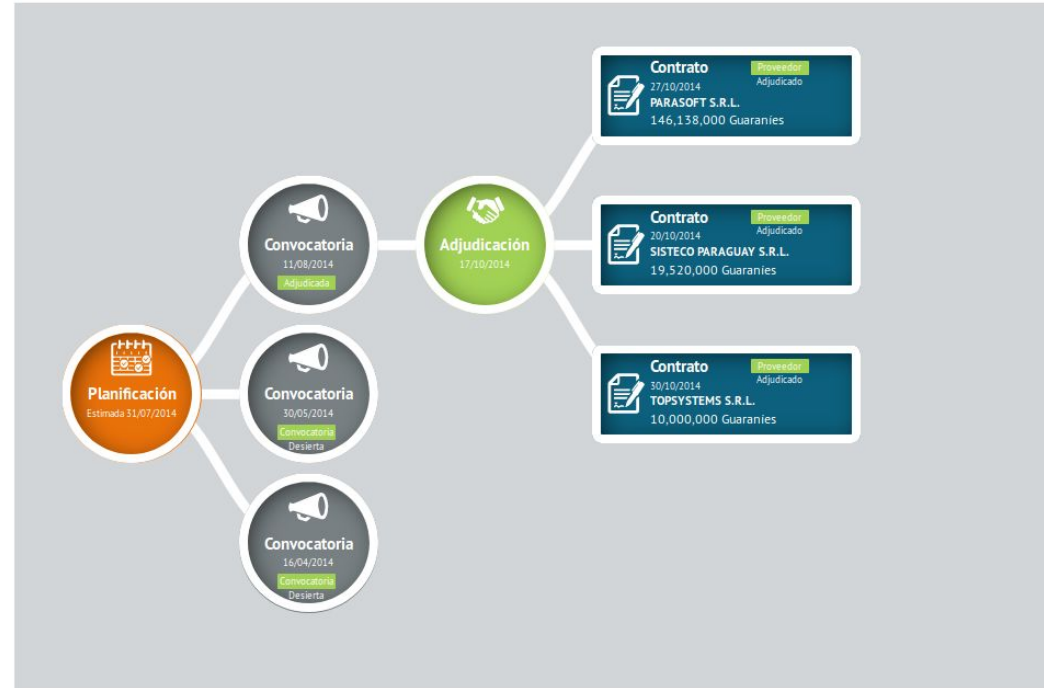


Examples

Paraguay provides visualizations to help users understand the relationship between the different stages of the contracting process.

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

ID del Llamado 272219 Ver Licitación



Referencias

Colores referenciales de Etapas y Estados

- | | | | | |
|---------|------------------------------------|------------------------|--------------------------------|----------|
| Etapas | Planificación | Convocatoria / Llamado | Adjudicación | Contrato |
| Estados | Adjudicado - Ejecutado - Publicado | Suspendido - Impugnado | Cancelado - Anulado - Desierto | |

Observación: Primero verás al último evento ocurrido en cada etapa y los contratos de mayor monto de la licitación.

Incluir en mi web

Examples

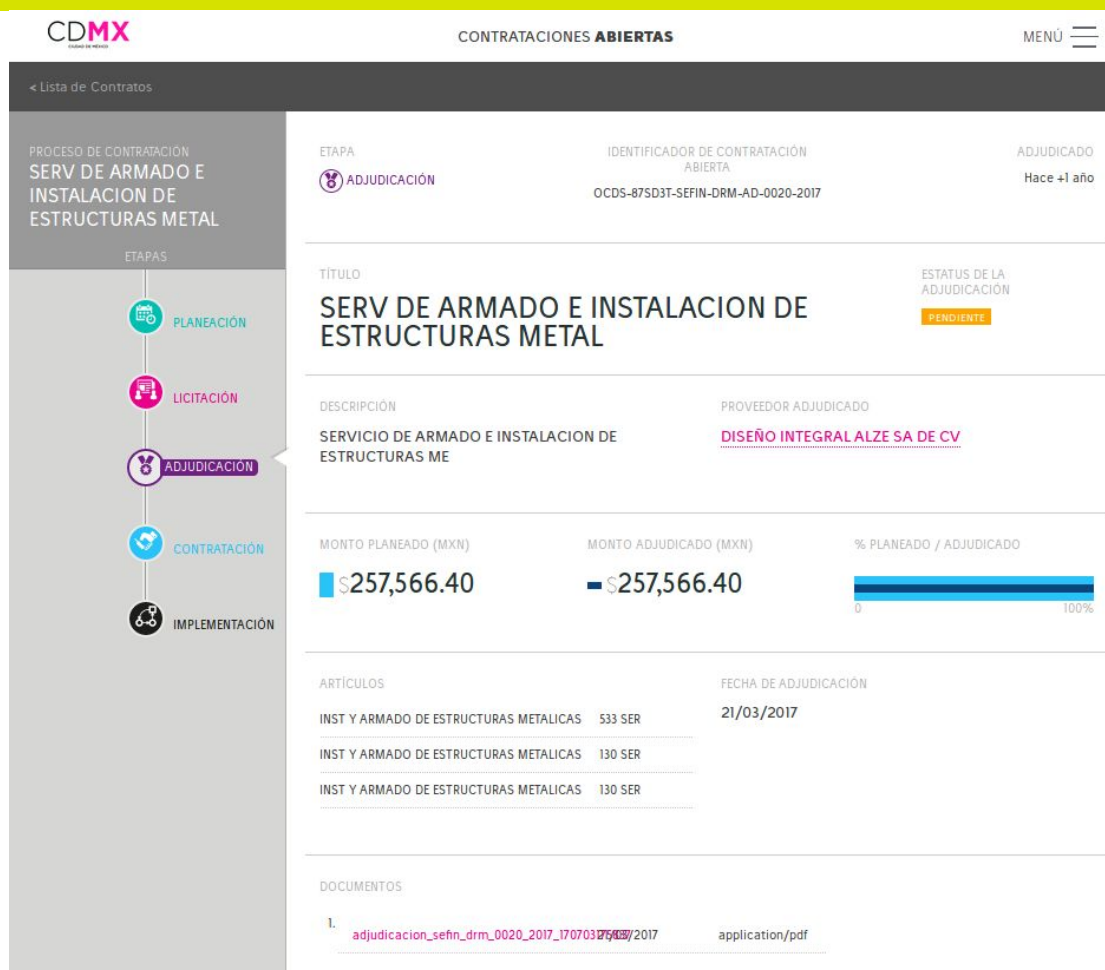
zindex.cz benchmarks Czech procuring entities against a range of performance indicators



Examples

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



The screenshot displays the 'Lista de Contratos' page on the City of Mexico portal. The contract details are as follows:

- ETAPA:** ADJUDICACIÓN
- IDENTIFICADOR DE CONTRATACIÓN ABIERTA:** OCDS-87SD3T-SEFIN-DRM-AD-0020-2017
- ADJUDICADO:** Hace +1 año
- TÍTULO:** SERV DE ARMADO E INSTALACION DE ESTRUCTURAS METAL
- ESTATUS DE LA ADJUDICACIÓN:** PENDIENTE
- DESCRIPCIÓN:** SERVICIO DE ARMADO E INSTALACION DE ESTRUCTURAS ME
- PROVEEDOR ADJUDICADO:** DISEÑO INTEGRAL ALZE SA DE CV
- MONTO PLANEADO (MXN):** \$257,566.40
- MONTO ADJUDICADO (MXN):** \$257,566.40
- % PLANEADO / ADJUDICADO:** 100%
- ARTÍCULOS:**

ARTÍCULOS	FECHA DE ADJUDICACIÓN
INST Y ARMADO DE ESTRUCTURAS METALICAS 533 SER	21/03/2017
INST Y ARMADO DE ESTRUCTURAS METALICAS 130 SER	
INST Y ARMADO DE ESTRUCTURAS METALICAS 130 SER	
- DOCUMENTOS:**
 - adjudicacion_sefn_drm_0020_2017_170703175433/2017 application/pdf

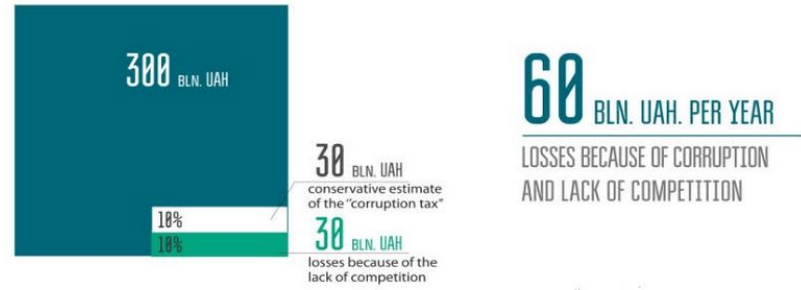
Examples

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



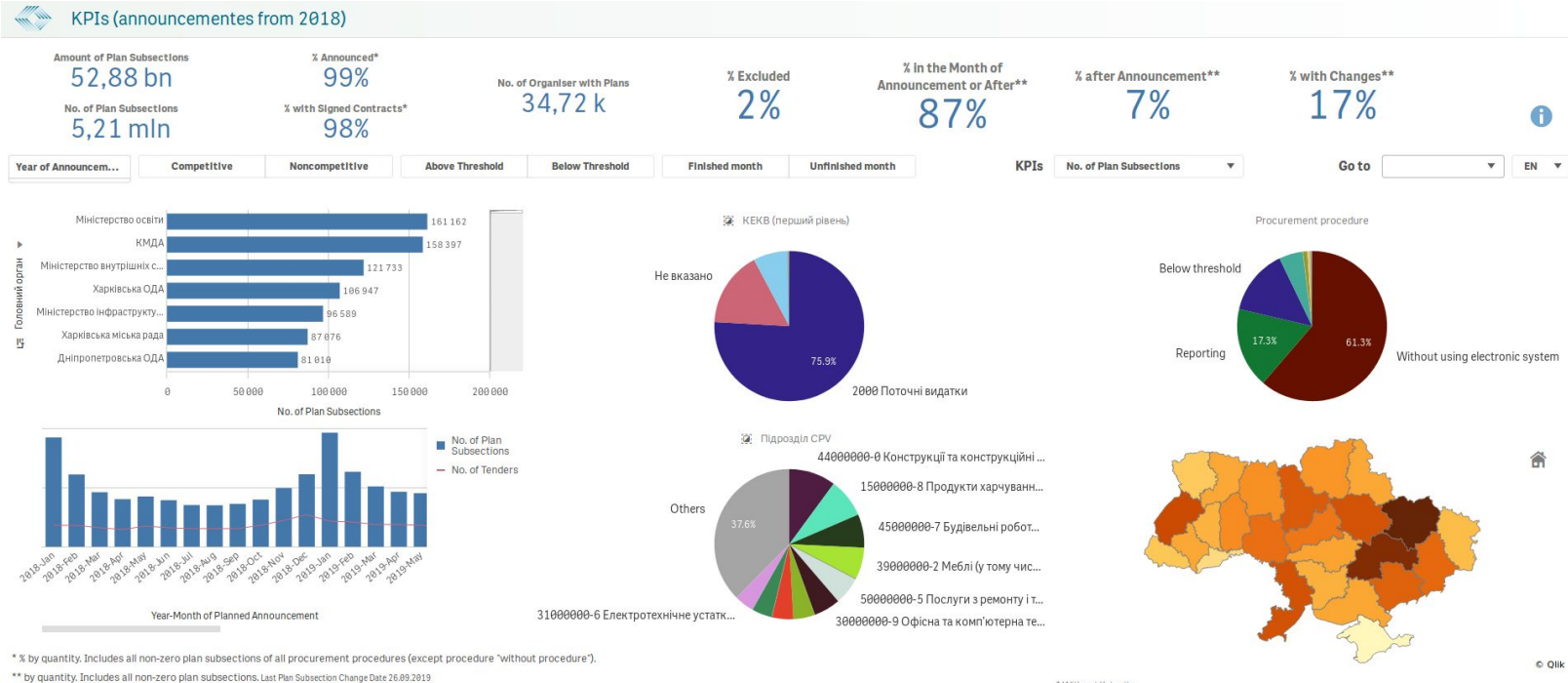
ProZorro is a hybrid electronic open source government e-procurement system created as the result of a partnership between business, government and the civil society

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.



Examples

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



Examples

...and a public complaints and monitoring tool with guidance on how to monitor public procurement.

The AMCU appeals practice

Before sending a complaint to the AMCU in accordance with Article 18 of the Law, we invite you to familiarize yourself with the decisions of the AMCU on typical situations in the field of public procurement.

Warning! These solutions are examples for analysis. When considering complaints, the AMCU Board proceeds from the position of a specific subject of appeal and its justification and explanations of the Customer

Warning! Before filing a complaint, we recommend that you familiarize yourself with the [common mistakes made by complainants](#) in the ProZorro system and the [Regulations of the Permanent Administrative Board on Complaints of Violations of Public Procurement Legislation](#) !



<p>CONCERNING THE IMPLEMENTATION OF SIMILAR CONTRACTS</p>	<p>CONCERNING THE VIOLATION OF THE GENERAL REQUIREMENTS OF THE TD AND THE REQUIREMENTS OF THE</p>	<p>AS FOR THE AVAILABILITY OF MATERIAL BASE AND SPECIALISTS</p>
<p>CONCERNING THE CONFIRMATION OF THE REQUIREMENTS OF ARTICLE 17 AND THE APPLICATION OF THE</p>	<p>REGARDING THE CALCULATION OF THE BID PRICE</p>	<p>REGARDING WARRANTY LETTERS FROM THE MANUFACTURER / DISTRIBUTOR / DEALER</p>
<p>REGARDING THE PROVISION OF TENDER SECURITY AND ENFORCEMENT OF THE</p>	<p>REGARDING THE ESTABLISHMENT OF NON-PRICE EVALUATION</p>	<p>CONCERNING THE COMPLIANCE OF THE TP WITH THE REQUIREMENTS OF THE TD IN TERMS OF</p>

Resource: Tools directory

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.

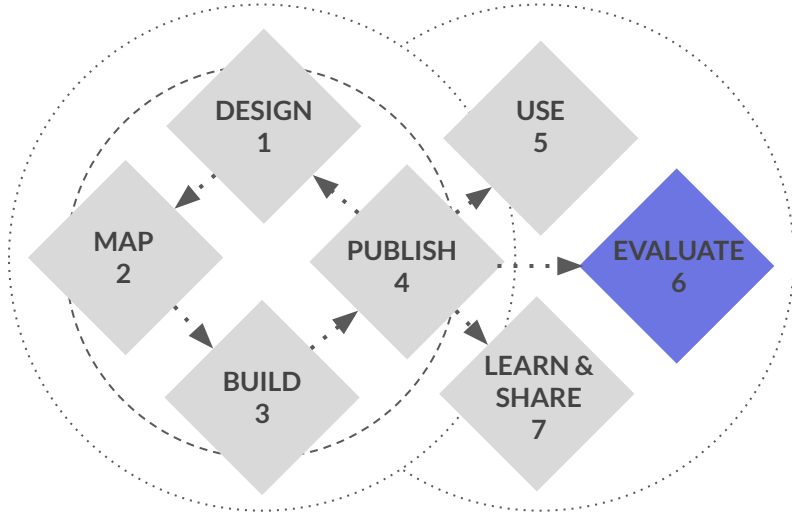
We also have a separate list of tools that can serve as **inspiration** when creating new open contracting projects or platforms.

The screenshot displays the 'Inspiration Gallery' interface on the Airtable platform. It features a search bar at the top right and navigation options like 'Filter' and 'Sort'. Three tool cards are visible:

- EDCA - Visualisation - Nuevo Ae...**: A card for a visualization tool from the Government of Mexico. It includes a scatter plot visualization and metadata such as 'ONE LINE DESCRIPTION', 'FIND IT AT (LINK)', 'CREATED BY', 'I'M LOOKING FOR', 'THAT CAN HELP ME', 'DATA', and 'FOR THE FOLLOWING STAGES'.
- Moldova Open Contracting Portal**: A card for an open contracting portal from Young Innovations. It includes a line graph visualization and similar metadata fields.
- Testigo Social 2.0 / Social Witne...**: A card for a social witness tool from TI Mexico. It includes a pie chart visualization and similar metadata fields.

www.open-contracting.org/resources/open-contracting-tools-directory/

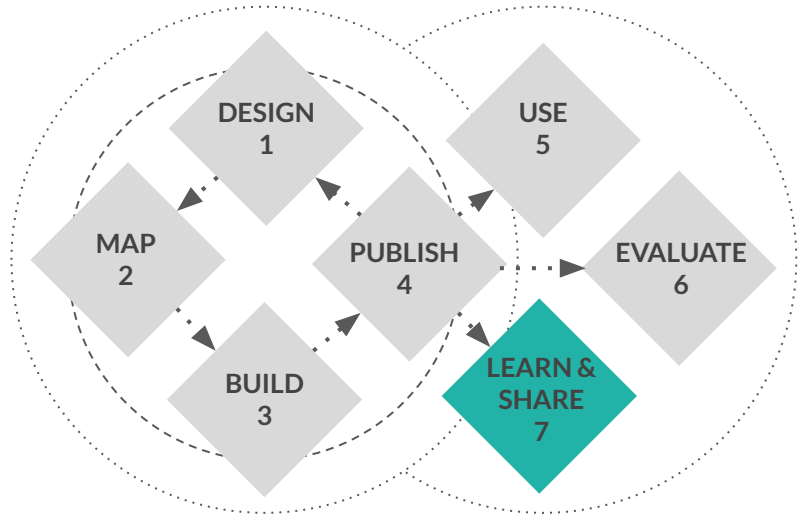
Step 6: Evaluate



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

Step 7: Learn & Share



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