Open Contracting
Data Standard

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Governments around the world spend an estimated US $9.5 trillion every single year through contracts. Yet, contracting information is often unavailable for public scrutiny. To change this, the Open Contracting Partnership (OCP) focuses on enhanced disclosure of information, and on ensuring all stakeholders participate in public contracting, at all stages of the contracting process, and for all types of contracts.

The Open Contracting Data Standard (OCDS) sets out **key documents and data** that should be published at each stage of a contracting process. The Standard is backed up by a **fully documented open data specification** that describes the data fields and structures that publishers should use to increase the accessibility, usability and interoperability of their disclosures.

> **WHY A DATA STANDARD?**
>
> A technical standard provides a ready-made approach to sharing data effectively, allowing the publisher to focus on content, completeness, and quality. It dramatically lowers the cost of producing, using, comparing, and integrating data. Given various reporting formats that might be required, a standard allows the publisher to publish data only once. Once data is standard compliant, technology tools and services can use the information easily and reliably. When technical standards gain wider adoption, global comparisons are made possible.

Matching supply and demand

The OCDS has been developed through a year-long collaborative process, drawing from existing data supply from over 15 countries, and engaging with a diverse set of contracting information users to understand their data needs.

In the consultations thus far with government, civil society, donors, journalists, auditors, and the private sector, four primary use cases emerged:

▸ **Achieving value for money in procurement:** The OCDS can help users to get good value for money on goods and services in the procurement process, and to identify whether value for money has been achieved in concluded contracts. These users are interested in analyzing trends in prices and supplier performance. Comparable data using common codelists, and the availability of unit prices, are particularly important for these use cases.

▸ **Detecting fraud and corruption:** All stakeholders have an interest in identifying and combating corruption in public contracting. Open contracting data can be used to scrutinize procurement data and documents for 'red flags' that might indicate public monies being misused. Linkable data with globally unique identifiers for companies is particularly important for these use cases.

▸ **Competing for public contracts:** Open contracting data can be used to track contracting opportunities. Using the OCDS can make information available at the early stages of a contracting process, including clear information on opportunities to tender for public contracts. Information on past contracts can allow firms to identify upcoming opportunities for re-contracting, and can support a more competitive marketplace. Forward-looking and timely information is particularly important for private sector users, as well as the ability to track procurement opportunities for particular goods or services.

▸ **Monitoring Service Delivery:** Users want to ensure that public contracting is delivering value to citizens in terms of quality and timeliness of goods, works, and services. This involves being able to link budgets and donor data to the contracts and results. It also involves being able to verify whether results are being delivered on the ground. Data concerning location and subcontracting is particularly useful for those involved in contracting monitoring.
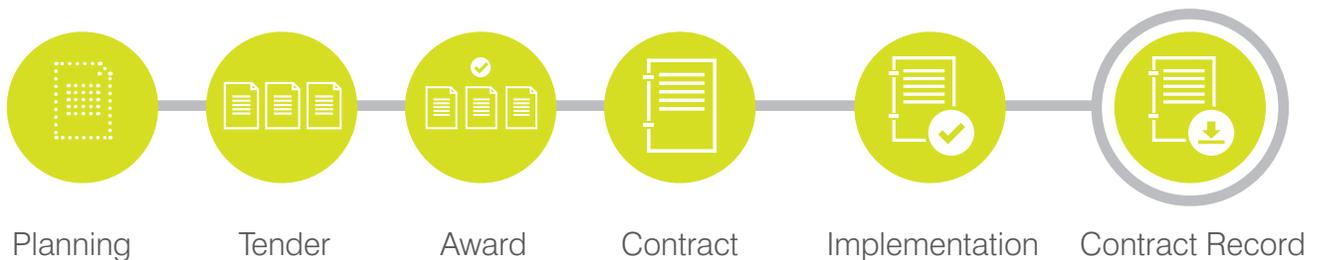
Transparency throughout the contracting process

The Open Contracting Data Standard is designed to cover each complete contracting process: from planning and budgeting, to tender (or negotiation), award, contract, implementation and completion.

The OCDS model combines regular stand-alone releases of data & documents providing information about specific stages of a contracting process, with a snapshot record of the full contracting process, and it's history

RELEASES

| Planning | Tender | Award | Contract | Implementation | Contract Record |

OCDS can be used to share data on:

- **31** Key dates
- Line items & their classification
- Buyers, suppliers & organizations involved
- **$** Contract values, budget & spending
- Location
- Milestones & Performance

At each stage of a contracting process, publishers can provide a **release** of data and documents, linking these to official notices. This ensures timely publication of data, and makes OCDS a living standard: not just something for backward-looking accounts of contracting, but a resource for building dynamic and accessible systems for contracting transparency.

Using common **identifiers** to classify goods and services and for organizations increases the comparability of data.

Releases can be brought together into a summary **record** providing an at-a-glance view of a contracting process, as well as allowing a full history of the contracting process to be constructed, showing any amendments or changes over time.

The initial version of the OCDS schema is designed around contracts awarded through classic procurement processes (goods, services, works). However, the standard is flexible and, through specific extensions, can be used for other kinds of contracts, including contracts related to land and extractive industries.

Leveling up: publication levels

The table below shows the different categories of data that publishers should seek to collect, manage and publish as part of an open contracting process. These are divided into three levels:

▶ **Basic** - these items are commonly held by organizations and provide a basic overview of a contracting process.

▶ **Intermediate** - these items are important to providing joined-up open contracting data, letting users follow key features of a contracting process over time. They may require publishers to connect up data in their internal systems.

▶ **Advanced** - these items are important to connecting open contracting data with other data sources (e.g. budget, project), and with real-world impacts (locations, milestones etc.). They may require some publishers to collect and manage additional data.

The detailed fields that can be used to represent each of these items are described in the OCDS schema.

SECTION	ITEM	DETAILS	BASIC	INTERMEDIATE	ADVANCED
Meta Data	date of update		X		
	nature of update			X	
Buyer Information	identifier			X	
	name and address		X		
Tender/Initiation	contract process identifier	from internal systems	X		
		globally unique identifier (OCID)		X	
	documents	See list			
	procuring entity	identifier		X	
		name and address	X		
	total estimated value			X	
	tender period		X		
	clarification period			X	
	award period		X		
	items	item quantities & descriptions	X		
		item classifications		X	
		location of deliverables			X
	milestones				X
	link to official notice	included via documents	X		
	bids			X	
	budget source				X
	related project ID	included in budget section			X
	location of contract	using location extension			X

SECTION	ITEM	DETAILS	BASIC	INTERMEDIATE	ADVANCED
Award	contract process identifier	from internal systems	X		
		globally unique OCID		X	
	award value		X		
	award date		X		
	suppliers	identifier		X	
		name and address	X		
	items	item quantities & description	X		
		item classifications		X	
		location of deliverables			X
	link to official notice	included via documents		X	
Contract	contract process identifier	from internal systems	X		
	related award identifier	used to link contracts and award		X	
	documents	See list			
	contract value		X		
	contract period		X		
	signature date			X	
	items	item quantities & descriptions	X		
		item classifications		X	
		location of deliverables			X
	milestones			X	
	link to official notice	included via documents		X	
Implementation	contract process identifier	from internal systems	X		
	documents	See list			
	total contract spend		X		
	actual end date				X
	milestones	due date		X	
		Status & completed date			X
	transactions				X

Key documents

The table below shows key documents to be published at each stage of the contracting process.

	PLANNING	TENDER/INITIATION	AWARD	CONTRACT	IMPLEMENTATION
basic	Procurement Plan	Tender Notice, Bidding Documents, Technical Specifications, Evaluation Criteria	Award Notice	Contract Notice	Completion certificate
intermediate	Public Hearing Notice, Market Studies	Eligibility Criteria, Clarifications to bidders questions, Shortlisted Firms	Evaluation report	Signed Contract , Arrangements for ending contract, Schedules and milestones	Physical progress reports, Financial progress report, Final Audit, Financial information
advanced	Environmental Impact, Assessment of government's assets and liabilities , Needs Assessment, Feasibility study, Project plan	Provisions for management of risks and liabilities, Bill Of Quantity, Information on bidders, conflicts of interest uncovered, debarments issued	Winning Bid, Complaints and decisions	Annexes to the Contract, Guarantees, Subcontracts	

5-Star publication ★

Not every government will immediately be able to achieve open data best practices for their open contracting data and documents. However, applying a 5 stars (★★★★★) of open data approach provides a set of stepping stones that can deliver transparency right away, and then progressively improve the usability of data.

‣ **Upload basic open contracting information to the web** ★
   Take information on contracting processes in whatever format it is currently available, and make sure it is available to citizens on the Web. This might involve uploading all the documents relating to a particular contracting process in one place, and keeping them updated.

‣ **Provide machine-readable data about contracts** ★★
   Provide structured datasets that contain key information recommended by the Open Contracting Data Standard. This may involve providing CSV files with field names and data structures from, or mapped to, OCDS.

‣ **Structure data using the OCDS standards** ★★★
   Use the Open Contracting Data Standard JSON data model to publish initiation, award, contract and implementation information for each contracting process. Adopt the release and records model to provide timely data, and a summary view of each contracting process.

‣ **Use best practices for open data on the web** ★★★★
   Provide releases and records at their own persistent URIs (web addresses), and make use of standard Application Program Interfaces (APIs) and protocols to allow discovery and re-use of your data.

‣ **Make links to other datasets** ★★★★★
   OCDS supports the provision of joined up data, making connections between aid, budget and other standardized data.

Adopting the standard

You can find out more about the Standard at ***http://standard.open-contracting.org*** where you will also find detailed documentation and guidance.

Version 1.0 of the Standard is ready for use by governments and other publishers.

The development team

The Open Contracting Data Standard is a core product of the Open Contracting Partnership (OCP). Version 1.0 of the standard has been developed for the OCP by the World Wide Web Foundation, through a project supported by the Omidyar Network and the World Bank.

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