

WORKSHOP 2. IMPROVING PROCEDURES FOR FRAMEWORK AGREEMENTS AND E-PROCUREMENT SOLUTIONS

Session 2: Selecting e-procurement solutions: e-catalogues and Dynamic Purchasing Systems

"The adoption of e-catalogues in the Consip's e-procurement system"

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Athens, September 23-24 2014



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# Consip Classification 1/2

To manage its eProcurement initiatives (MEPA eMarketplace, Framework Contracts and Agreement, Dynamic Purchasing System, etc.) Consip developed its own classification structure for goods and services.

### Why?

#### The classification structure is needed to:

- **Describe products/svcs** to enable digital transactions (e-catalog based direct orders, RFQ)
- **Enable digital/structured evaluation** in e-proc procedures
- Manage data in order to:
- **Get as much information as possible** out of the e-proc system
- Enable interoperability among public procurement systems



# Consip Classification 2/2

- In Consip internal classification, the "basic level" of goods/services (that we call "Metaproduct") is based on CPV codes and descriptions.
- The Consip classification regards more than 1500 "Metaproducts" (see later).
- Within the Consip Classification structure, all Metaproducts are characterized by (Consipdefined) attributes, that describe their properties.
- The attributes defined by Consip for Metaproducts are divided into:
  - 'basic attributes', applicable for any product (typically "commercial" character), that are common to all 1.500 Metaproducts; in total there are 22 basic attributes
  - and
  - 'specific attributes', describing technical features, performances etc. (typically different for each Metaproduct).



# The use of CPV codes by Consip

• In Consip Classification, **600 CPV codes** are used to identify the >1500 Metaproducts currently existing (more than 1 Metaproduct can be linked to the same CPV code).

#### Of these 600 CPV codes:

- 373 match the "item" level of CPV classification (below Category);
- 126 codes match the CPV level of "category";
- 69, 26 and 6 match respectively the CPV levels of Class, Group and Division.
- NOTE: The attributes defined for the Metaproducts of Consip classification can be a good basis for defining the properties of the related CPV codes. In total, the Consip-defined attributes relate to more than 2.000 CPV codes, either directly to a CPV item, or indirectly to a "family" (Category, Class, Group, Division) of CPV codes.



## **Consip Classification Structure** (1/4)

Consip classification Structure is a "Classification tree" based on Nodes and Metaproducts.

#### **Nodes**

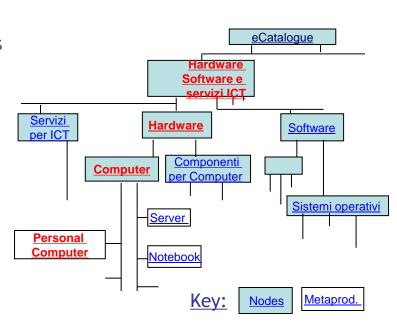
A Node is a set of homogenous Metaproducts; nodes are necessary to build the "Classification tree". Consip does not assign a CPV code to Nodes.

#### **Metaproducts**

A Metaproduct is a set of info describing a generic good/service; it has the lowest position in the Classification tree. **Each Metaproduct is linked to one CPV code**, and has a number of attributes that describe its characteristics.

The Metaproducts are 'steady' elements of the classification tree, as they are not linked to specific purchase initiatives (MEPA, Framework Agreements,

DPS....) The example (in red text) shows the path of Metaproduct "PC" along the classification tree





### Consip Classification Structure (2/4)

			•		` '		
ID-MP	<b>CCPV</b> Code	IT			MEMETAPRODUCT		INITIATIVE
	0900000-3	Prodotti derivati dal petrolio, combi	cità e altre fonti di energia				
	09100000-0	Combustibili					
200012	09100000-0	Combustibili			Combustibili per riscaldamento		Noto: 4
	09110000-3	Combustibili solidi					Note: the same
	09111000-0	Carbone e combustibili a base di c	arbone	1 Metaproducts linl	ked to 1 CPV (CPV Group		
	09111100-1	Carbone			<u>level)</u>	inst	Metaproduct is
- indieu Oh multi-							
ID-MP	CCPV Code				MIMETAPRODUCT <sup>1</sup>		initiatives (through
		Circuiteria per minicomputer				<b>ત</b> :	through
		Unità centrali per minicomputer	110	rE· More		<u>ui</u>	fferent Fac sheets)
		Computer personali	NO	TL. 1110			sineets)
		Computer personali	Motor	products	PC Thin Client		ICT2009
		Computer personali	Meta	TE: More products	Personal Computer (acquisto)		IC <u>PC MEPA</u>
		Computer personali			Personal computer (acquisto)		Reti locali 3
		Computer personali		linked to the	Personal computer (acquisto)		P(PC Framework Agreem. 11
200035	30213000-5	Computer personali	are	e III IKCC s	> Personal Computer (Progetto	LIM	ICT2009
200093	30213000-5	Computer personali	1111	e linked to the e CPV code	Personal computer (acquisto) -	Gara	PC Desktop 11
	30213100-6	Computer portatili	saiii	<del>C 0.</del>			
100082	30213100-6	Computer portatili			Notebook elettronici		ICT2009
100082	30213100-6	Computer portatili			Notebook elettronici		PC Portatili 9
200034	30213100-6	Computer portatili			> Notebook (Progetto LIM 2010)		ICT2009
100084	30213100-6	Computer portatili			Notebook heavy-duty		ICT2009
	30213200-7	Computer modello tablet					
	30213300-8	Computer modello desktop					

The example (in red text) still shows the case of the Metaproduct "PC":

Note that more than one Metaproduct refers to the same CPV Code used for "PC" (e.g. PC Thin client)

Note also that the Metaproduct PC is instantiated in two different initiatives, where it will be characterised by different attributes.



## **Consip Classification Structure** (3/4)

The Metaproducts of Consip "Classification tree" are used as basis to create the structure necessary to manage Consip eCatalogues.

The key 'link' between the Metaproducts (and the CPV code) and the eCatalogues Items is represented by "Technical Factsheets".

#### **Technical factsheets:**

A Technical factsheet is an instantiation of a Metaproduct, created "ad hoc" for each purchase initiative (MEPA, Framework Agreement etc.).

Thus, a Technical factsheet is always linked to a Metaproduct (hence to a CPV code); several technical factsheets may be linked to one Metaproduct (i.e. the relationship between Metaproduct and Technical factsheets is 1 to n).

A Technical Factsheet is a subset of the attributes of the Metaproduct that it is linked to. This subset is used for the specific initiative. In addition, the Technical Factsheets include rules and algorithms (restrictions on admitted values, etc.) that must be respected by the eCatalogues. **Overall, Technical factsheets are more than 4.000.** 

Technical factsheets can be organized in a hierarchical order, to manage "principal products" and "accessories/spare parts"

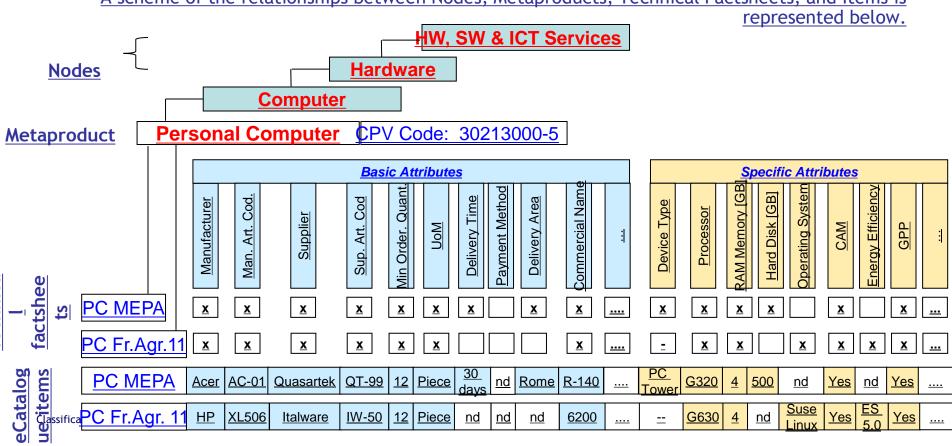
#### eCatalogue Items

An item is the basic content element of eCatalogues. Each item includes the information on the properties of the offered good/service, organized according to the record structure of the Technical factsheet. The properties regard both manufacturer info (e.g. manufactures article code) and supplier info (delivery time, etc.).



### Consip Classification Structure (4/4)

A scheme of the relationships between Nodes, Metaproducts, Technical Factsheets, and Items is





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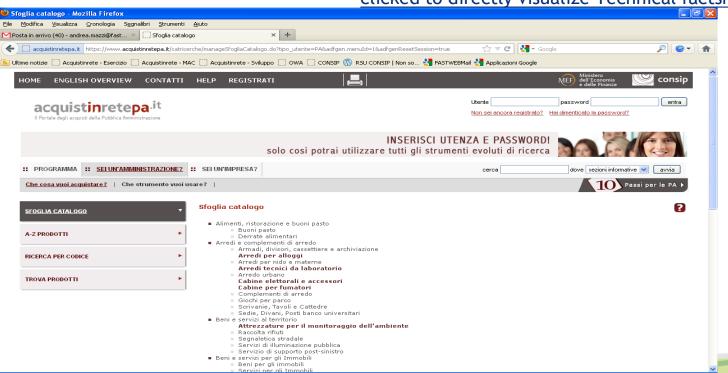
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Classification: Cor

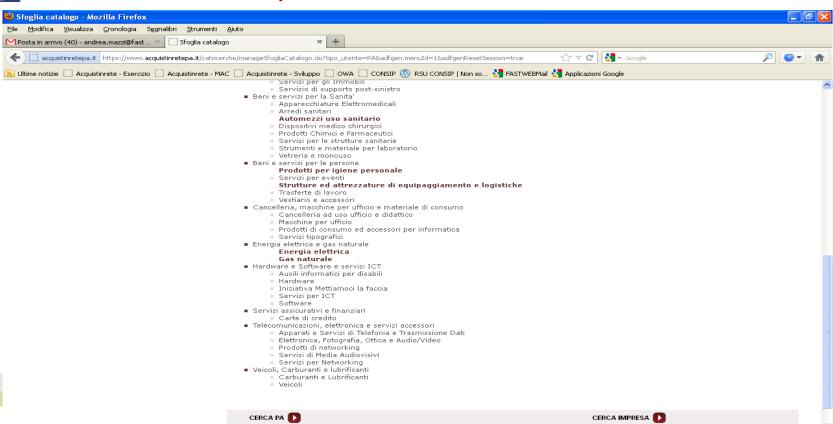
### Consip Classification on the Portal (1/6)

The screenshot shows the Consip Classification tree, available on www.acquistinretepa.it
The screenshot only displays the first and the second level of the tree. Normal character identifies
the Nodes, that can be further navigated, bold character identifies Metaproducts, that can be
clicked to directly visualize Technical factsheets.





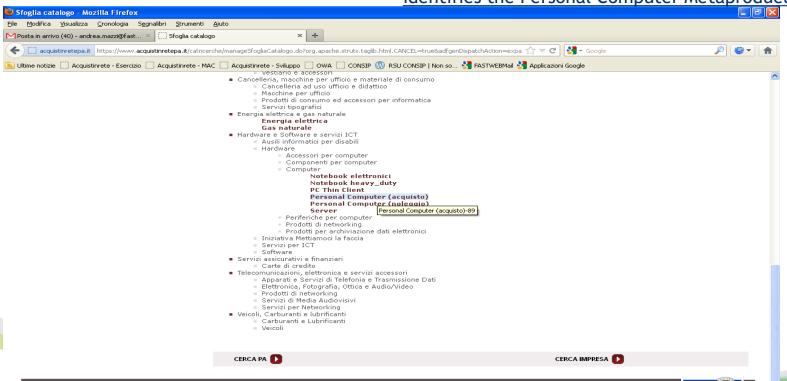
### Consip Classification on the Portal (2/6)





### Consip Classification on the Portal (3/6)

In this screenshot also the third and the forth levels are displayed, to show the full path that identifies the Personal Computer Metaproduct.

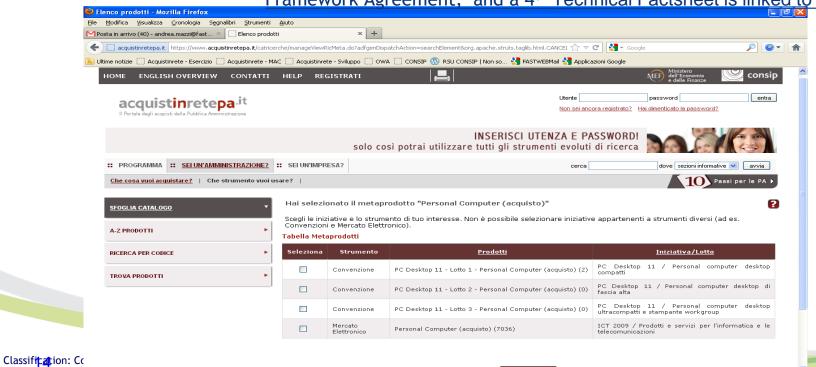




### Consip Classification on the Portal (4/6)

By clicking on the Metaproduct "Personal Computer", the system shows the List of Technical Factsheets related to that Metaproduct.

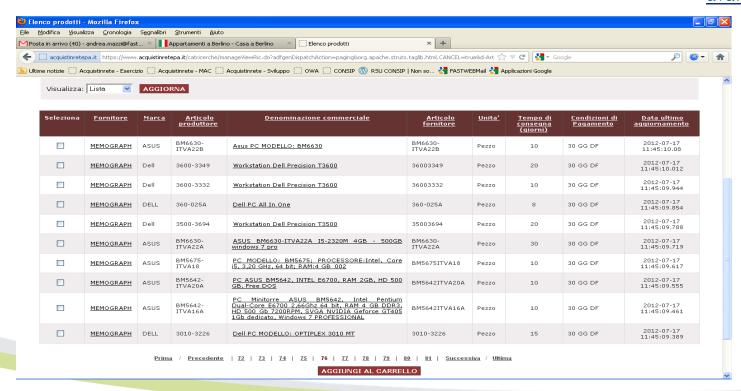
In the case of Personal Computer, three Technical Factsheets are linked to different lots of one Framework Agreement, and a 4<sup>th</sup> Technical Factsheet is linked to MEPA.





#### Consip Classification on the Portal (5/6)

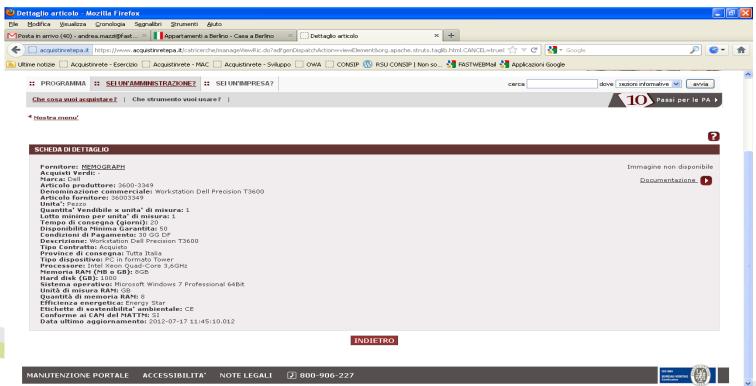
By opening the Tech Factsheet of MEPA, the system shows all 7036 eCatalogue Items currently available.





#### Consip Classification on the Portal (6/6)

Clicking on a single item, (in this example, the second row of the list of the previous screenshot) the system shows the details of the product selected.





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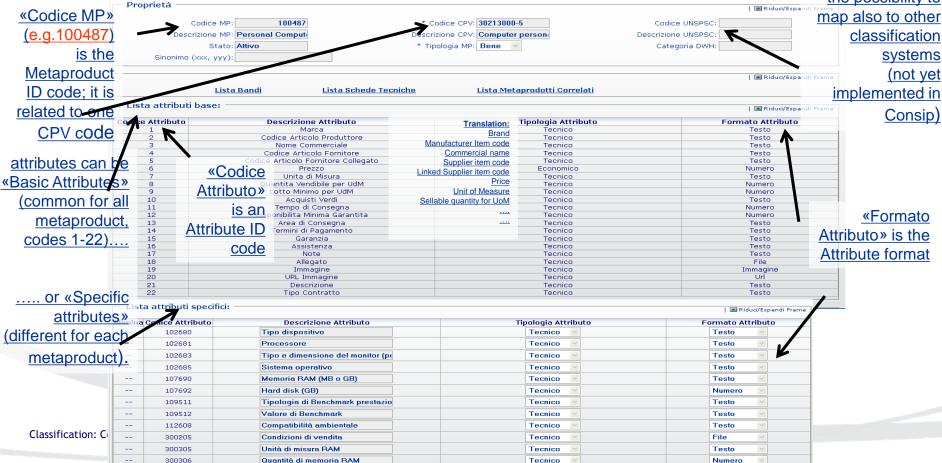
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#### Metaproduct: Personal computer

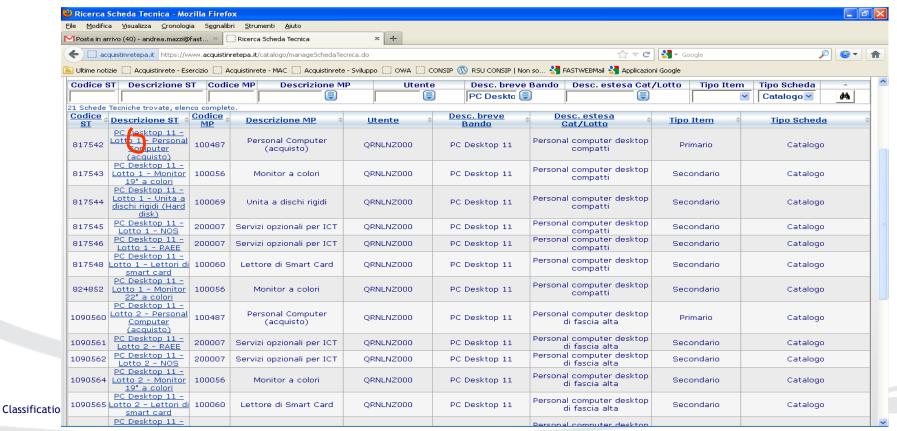
In principle, the system provides the possibility to map also to other classification systems





#### List of Technical Factsheets

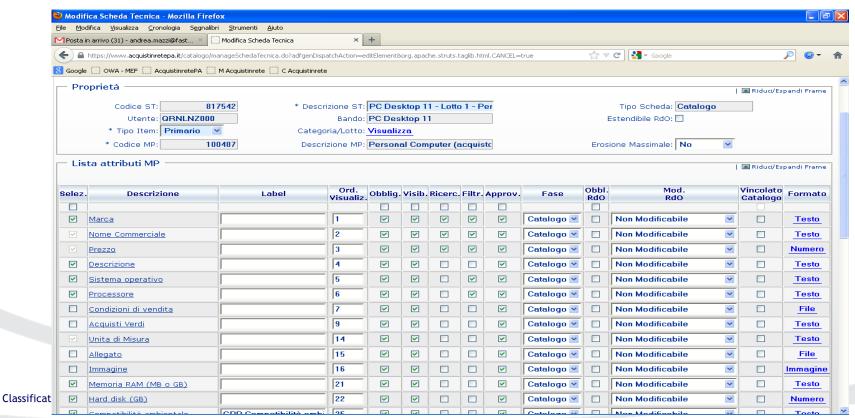
One Intiative (for example, Framework Agreement «PC Desktop 11») includes a number of factsheets. The picture displays the list of TechFactsh





#### Detail of one Technical Factsheet

Category Managers create Factsheets for a specific initiative/lot, selecting the wished attributes from the whole set of attributes linked to one Metaproduct

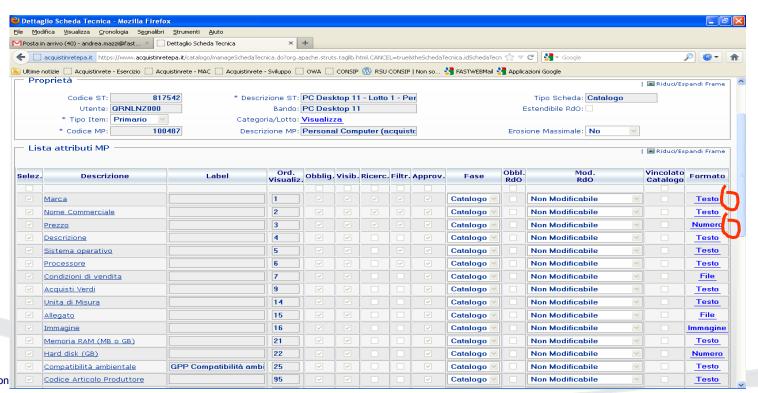




#### Detail of one Technical Factsheet

Once attributes are selected, Category Managers customise every attribute, e.g. by defining the order of visualization, deciding if it compulsory («Obbl.»), searchability,

or defining the format (see examples in next slides for «Marca» (= «Brand») and Prezzo» (= «Price»)



Classification: Con



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# **Consip Classification Management**

Two different roles exist within eCatalogue Management system:

- Catalogue Manager (Centralized)
  - Management of the Consip classification system: Nodes, Metaproducts, attributes (creation, update, deletion, association with CPV, etc.)
  - Requirements for upgrades
- Category Manager (Distributed)
  - Proposal and management of new attributes
  - Creation and management of specific Technical Factsheets
  - Assistance to suppliers for on-boarding of eCatalogues