Electronic European Single Procurement Document (eESPD) Service - Buyer Tutorial

Using the ESPD request as part of a tender competition

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eESPD Tutorial - Contracting Authority

Background, Introduction, Key Features, Component Parts
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Additional Guides
• Supplier Completing ESPD Responses – Click HERE

Further assistance is available by emailing the eTenders Helpdesk at etenders@eu-supply.com
Background to the ESPD Regulation

- The European Single Procurement Document (ESPD) is a standard self-declaration form used in OJEU level public procurement procedures by contracting authorities (buyers) and economic operators (suppliers) across the EU.
- Its purpose is to remove some of the barriers to participation in public procurement, especially for small and medium-sized enterprises (SMEs).
- According to Regulation 59(7) of the Public Procurement Directives the ESPD shall be provided exclusively in electronic format.
- The ESPD consists of an ESPD request which is generated and issued by the buyer to which the supplier can submit an ESPD response.
- The ESPD will act as a “business passport” for companies bidding for tenders anywhere in the EU.
- The ESPD service on eTenders replaces paper versions of the form issued with procurement documents.
Introduction to the eTenders eESPD Service

• The Office of Government Procurement (OGP) has developed the ESPD service on the eTenders platform based on the EU Commission’s data exchange model
• The ESPD service will allow the buyer to create and re-use an ESPD request template determining the exclusion and selection criteria for a specific contract type e.g. Services, Supplies or Works. Please refer to Appendix A
• eTenders captures a full audit trail of the ESPD process
• The ESPD includes functionality which allows consortia to submit a joint response and for main contractors to comply with ESPD regulatory requirements where sub-contractors are used
**eESPD - Key Features**

- Integrated with buyer procurement checklists on eTenders
- Auto prefilling of buyer and tender information within ESPD forms
- Pre-defined ESPD templates can be associated with procedure types e.g. OJEU Restricted Procedure for Works
- Global indication tick box for selection criteria also available in the ESPD service allowing the buyer to use the questions within the ESPD service **OR** continue to set-out selection criteria in the request for tender documents
- Integrated with eCertis (a mapping tool used to identify national law and compare evidence required in public procurement procedures across the EU)
ESPD Service - Component Parts

**Part I** - Information concerning the procurement procedure and the contracting authority

**Part II** - Information concerning the supplier (only displays in the supplier ESPD Response)

**Part III** - Exclusion criteria

- **Section A:** Six Grounds relating to criminal convictions *(Mandatory)*
- **Section B:** Two Grounds relating to the payment of taxes or social security contributions *(Mandatory)*
- **Section C:** Fifteen Grounds relating to insolvency, conflicts of interests or professional misconduct *(Optional)*

**Part IV** - Selection criteria *(All Optional)* – *Global Indication available allowing the buyer to continue to set-out selection criteria in their request for tender documents*

- **Section A:** Four Suitability Questions
- **Section B:** Eight Economic and financial standing
- **Section C:** Eighteen Technical and professional ability
- **Section D:** Two Quality assurance schemes and environmental management standards

**Part V** - Reduction of the number of qualified candidates (Restricted two-step procedures only)

**Part VI** - Concluding statements by supplier
eESPD Service - Contracting Authority

Section 1 - Completing the ESPD Request
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- The selected OJEU procedure competition checklist includes an ESPD Request
- Click the Edit button to open the ESPD and complete as appropriate
Section 1: Step 1 - Autofill of Part I (Preliminary Data)

- Information about the buyer and procurement procedure will prefill into Part I from the draft tender notice.
- The notice number in the OJS will autofill when published in TED (after 48 hours).
- Click **Save and next** to move to Part III - Exclusion Grounds.
The ESPD Part III contains three sections, labelled A, B and C.

The exclusion grounds in sections A & B are mandatory and are pre-selected by default, they **cannot** be excluded from the ESPD request.

The ESPD service is integrated with eCertis (a mapping tool used to identify national law and compare evidence required in public procurement procedures across the EU). Click on National law and evidence information.

The ESPD regulation allows buyers to request evidence documentation to be submitted as part of the supplier’s tender response. The buyer must select ‘Yes’ for each exclusion ground where the evidence is required as part of the submission.
Section 1: Step 3 - Part III (Optional Exclusion Criteria) - Section C

• The exclusion grounds in section C are optional and can be selected if required for the procurement procedure.

• As with Sections A & B, the ESPD regulation allows buyers to request evidence documentation to be submitted as part of the tender response. The buyer must select ‘Yes’ for each discretionary exclusion ground where the evidence is required as part of the tender response.
Step 4: Part IV (Discretionary Selection Criteria) - Options

- Part IV of the ESPD relates to the discretionary selection criteria of the competition. There are two options available;

- **Option 1** - Buyer uses the Global Indication for all selection criteria which refers the Economic Operators to the request for tender documents containing the criteria - select **No**

- **Option 2** - Buyer uses all/some selection criteria outlined in Part IV of the ESPD service in sections A to D - select **Yes**
Step 4.1: Part IV - Global Indication Option 1: Use RFT Tender Documents for selection criteria

- If the buyer does not wish to use the selection criteria in the ESPD request they must:
  1. Select “No” for Global Indication and
  2. Click the RFT Document Reference Point button to enter specific instructions in the free text field where the supplier can find details about the selection criteria used for this competition
  3. The text entered in the extract across is the default option and can be replaced/overwritten
Step 4.2: Part IV - Global Indication Option 2: Use ESPD service selection criteria

- To avail of the option to use the regulated selection criteria within the ESPD service the buyer must select the ‘Yes’ option and all Part IV selection questions will appear.

- There are 15 selection questions in this section. The buyer can choose as many as they deem appropriate for their procurement by selecting the checkbox for the question.

- The buyer can reference the RFT documents for criteria and evidence requirements. If these boxes are not checked by the buyer they will not appear to the suppliers who express an interest.
Step 5: Review ESPD Request

- Once the buyer has completed the ESPD request, the form will be presented in full for review.

- If any further amendments are required, simply click into the relevant section panel to amend.

- When amendments are complete, click the **save and next** button to move to the next section.
Step 5.1 : Finalise the ESPD Request

- When satisfied with the content, the buyer can finalise and include the ESPD request in the RFT checklist.
- The ESPD is included in the published tender notice and can be accessed by the supplier once they have accepted the competition.
- A separate ESPD guide has been prepared for suppliers and this is available by clicking **HERE**.
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Section 2 - Accessing ESPD Responses
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- When the supplier has included their ESPD response as part of their tender submission, the buyer can view responses after opening the tender box.
Section 2: View ESPD Response

• Once the buyer clicks on the ESPD Response, the ESPD document will appear for download, it can be downloaded by clicking on the title of the ESPD
Section 2: Save/Print ESPD Responses

Once the ESPD Response is opened, the ESPD document can be printed via the print button or saved as a PDF file if required.
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Section 3 - Appendix A: ESPD Request Templates
Section 3: Creating the ESPD Template

- The buyer user must have administrator role permissions on eTenders
- To access the ESPD Template Library Section the company administration button must be selected
Section 3: Creating the ESPD Template

• Once the buyer is in the company administration page, scroll down to access the ESPD Template Library Page.
Section 3: Creating the ESPD Template

• Upon first access, the buyer will see two pre-defined templates already created. These templates can be linked to Open Procedures (ESPD Request 1 Step) or Restricted Procedures (ESPD Request 2 Step), Competitive Dialogue Procedures etc.

• The buyer can also create additional templates to suit particular local procurement needs. Click on the create button to begin the process.
Section 3: Creating the ESPD Template

Buyers will be presented with a pop-up box where they will need to enter an appropriate name for this re-usable ESPD Template, click save to progress through the ESPD.
Section 3: Creating the ESPD Template

- You will be presented with the ESPD Preliminary Data screen and the relevant sections of the ESPD. The country is defaulted to Ireland but can be changed via the dropdown facility.

- Click **save and next** to move into the main sections of the ESPD. Refer to **Slide 10** above.
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