



SIGMA

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Creating Change Together

SIGMA

Public Procurement

Training Manual

Update 2015

Explanatory Note

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SIGMA Procurement Training Manual – Update Project 2015
Summary of approach to updating the Manual
Notes for those updating the national versions of the Manual

In 2014 three new public procurement Directives were adopted by the European Union. These must be implemented in Member States by April 2016. The three Directives are:

- Public Sector Directive 2014/24/EU - which replaces Directive 2004/18/EC;
- Utilities Directive 2014/25/EU - which replaces Directive 2004/17/EC;
- Concessions Directive 2014/23/EU - which is new.

The SIGMA Procurement Training Manual (“the Manual”) was published in 2010.

The Update Document sets out the *key* changes to the Manual resulting from the 2014 Directives.

The Update Document was prepared in the first half of 2015 by SIGMA experts: Susie Smith (UK), Annemarie Mille (Austria), Teja Kolar (Croatia) and Gheorghe Cazan (Romania). The project was managed by Marian Lemke (lead manager) and Caroline Kempeneer (project co-ordinator).

1 UPDATING - KEY PRINCIPLES

- This is a simple update, focussing on key issues, and is not a wholesale re-write of the Manual.
- The Update Document updates the Student Manual, not the Trainer Manual.

- The Update Document updates (where relevant) the following sections in each Module:
 - Introduction;
 - Narrative;
 - Exercises;
 - Self-Test Questions.
- There is no general update to the Law sections
 - references to the relevant provisions in the 2014 Directives are included at the start of the Law sections.
- The slides have not been amended.

- Updating is limited to:
 - Changes introduced by the 2014 Directives
 - where the only change required in a sentence/paragraph is a reference to the 2014 Directive/s then the sentence/paragraph has not been updated.
 - CJEU cases of major importance.
 - Amendments to correct significant errors.
 - Cross references to additional SIGMA materials available on-line.
 - Information notes on sections which have not been updated to reflect changes since 2010
 - for example, there is a detailed commentary in Module C2 on the ICC Model Sale Contract and INCOTERMS. A new edition of the INCOTERMS was published at the start of 2011. The commentary has not been updated to reflect these new terms but a note is included referring to the new edition of the INCOTERMS.

- Wherever possible the authors have retained the original text, adding to it to explain the changes introduced by the 2014 Directives.
- In some cases it was more straightforward to re-write paragraphs or blocks of paragraphs rather than make significant amendments.

2 THE UPDATE DOCUMENT - TECHNICAL NOTES

Track changes: Track changes are used to show where amendments are to be made to Student Manual

- o Deletions are shown in red as strikethroughs: ~~strikethrough~~
- o Additions are underlined and in blue: underlined addition

Limited text is shown: In general only the amended text is shown. So, for example, where there are four paragraphs on a page but only one paragraph needs to be updated then the only text shown in the update document is the paragraph which needs to be updated.

PDF page reference:

PDF B-43

A PDF page reference is used to assist editors in the updating process. The update document was based on a Word document. The PDF page reference indicates where the amendments are to be made, by reference to the published PDF version of the Student Manual (2010).

Section or paragraph numbering and headings:

For example

1. Pre-planning and the annual procurement plan

Section headings, paragraph numbering and paragraph headings are inserted where necessary to assist editors in finding where changes need to be made.

Locator mark/s:

▼Locator marks▼

Locator marks are used to assist editors in finding where changes need to be made. In general the locator marks refer to either a heading or a sentence which is not amended but which is easier to find than the amended sentence or section

Dots:

.....

Dots are used to show that there is more text in the sentence or paragraph - but no more amendments need to be made.

Break line:

A break line is used to show a break between amendments on the same page, where amendments are not continuous.

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Instructions in blue italics:

Instructions in blue italics

There are instructions and notes in blue italics to:

- assist editors in finding the changes;
- reduce the length of the document where large amounts of continuous text are deleted and a decision was made to not show the deletions as track changed deletions.