**Open Fiscal Data Package Advisory Group Call,**

**25 May 2017**

Agenda:

- Welcome and introduction, Juan Pablo Guerrero, GIFT

- Finalization of phase II pilots and presentation of phase III, Diana Krebs, Open Knowledge

- Comments on the pilot and publication experience, and on phase III, Lorena Rivero, Department of Finance and Public Credit, Mexico

- Q&A/ comments around the table

**Participants:**

Adam Kariv (OKI), Amparo Ballivian (WB), Diana Krebs (OKI), Eduardo Andrés Estrada (WB), Juan Pane (ILDA, Paraguay), Adam Kariv, *OKI*, Jean Noé Landry (Open North), Lorena Rivero (SHCP, Mx), Tania Sánchez & Tarick Gracida (GIFT), Juan Pablo Guerrero (GIFT),

**Conclusion of pilots in phase II**

Pilots were conducted with Mexico, Croatia, Guatemala, Uruguay and Paraguay. The exercise included assistance in data cleaning and structuring and uploading; and training the country teams to manage the tool. Valuable feedback was collected throughout the process. Some of the issues raised were already addressed in this phase, while others will be solved and developed during the new phase. A table summarizing this feedback is attached.

JPGA mentioned the USA case on open spending and the willingness of the US Treasury Department to share the experience and the technological knowledge with willing countries

<https://www.usaspending.gov/Pages/data-act.aspx>

**Overview of phase III**

Diana Krebs explained that the phase that started in April is organized around 6 work packages:

1. Pilot support: designed for GIFT to offer consistent support to their pilot partners, also after piloting periods ends.
2. Platform availability: to encourage governments and other similar entities to use the platform freely, by giving them some core assurances as to the stability and availability of the platform as a whole.
3. New pilots: aiming at widening the circle of governments with new pilot partners that encourage others to use it as well. Guide for Pilots was distributed.
4. Feature enhancements: working on the feedback as to the usability of OpenSpending provided by pilot partners. Open Knowledge International merges these enhancement suggestions with its product vision for OS.
5. Spending data: research with actionable results towards linking budget data with spending data.
6. v1 of Open Fiscal Data Package: completing the specification.

Adam Kariv added that this was about bringing back everything that was learned in the previous phase and integrating it into the specification.

Juan Pablo Guerrero mentioned that Paul Walsh would like to get in contact to collect input around the development of the specification. OKI will follow up on this.

**Questions and comments**

Tim Davis raised two concerns. First, he stressed the need to not only address the technical/ supply side of the OFDP, but also focus on the demand side, and really understanding the users’ needs, and tailor the Open Spending accordingly.

Second, Tim underlined the issue of the spec (tool) governance, and the need to work towards interoperability, starting with developing the unique identifier. He offered to share some of the lessons learned with Open Contracting, so we can avoid a few of the mistakes they came across. Adam mentioned that the plan is indeed to work on the unique identifier. When thinking about governance, Tim inquired about the stability over time of the API. If, for example, a way to link the OFDP to contractual data is standardized to what extent are there assurances that OKI will not change the API? Adam replied that moving towards v1 of the OFDP will be an approach to solve this.

GIFT and OKI will follow up, by reaching out to Advisory Group members that would like to collaborate more actively on these two topics: systematically addressing the users’ perspective and interoperability and governance.

Lorena Rivero praised the API as stable and highly flexible. In fact, she said, they even are using it more than the Open Spending Viewer; and they (in Mexico) are linking the extensions directly with the API. She offered to share this experience.

Eduardo Estrada advised that we need to produce materials that easily and clearly explain to the user what the tool is about and how to use it, because it is not completely intuitive.

Juan Pablo cited Amparo Ballivian’s offer to reach out to the US experience, where just recently as part of the DATA, the US Treasury Department has released $3.85 trillion of spending information in a single open data set.

Jean Noe Landry made a note on the current opportunities in Canada, given that they have taken a seat at the OGP Steering Committee, and they have the goal of taking the lead on open data. Thus, he requested to the groups references and materials that can help inform this initiative. Eduardo offered to share WB documents that may be of interest. (attached)

Also, following up on the call, Eduardo Estrada kindly shared information on the Open Data Readiness Assessment (ODRA), noting that:

"This is a methodological tool developed by the World Bank to assess the readiness of a government to evaluate, design, and implement an open data initiative. Most ODRAs that I am familiar with are whole-of-government assessments and cover open data broadly and do not have a specific focus on fiscal data. That said, given the importance of budget, spending, and contracting data, ODRAs typically examine whether these datasets are open (or could be opened). The URL that I am including below includes examples of ODRAs for a variety of countries. I am also sharing with you an example from Jamaica, where we had a focus on open budget data as a request from the donor (DFID)."

Open Data Readiness Assessment (ODRA):

[http://opendatatoolkit.worldbank.org/en/odra.html](http://opendatatoolkit.worldbank.org/en/odra.html%22%20%5Ct%20%22_blank)

Open Data Readiness Assessment – Jamaica:

<http://data.gov.jm/story/open-data-readiness-assessment>

Also, below are the links to the documents on the topic that Juan Pablo mentioned:

On Open Data, mapping the landscape, here is the link:

<http://www.fiscaltransparency.net/resourcesfiles/files/20150902128.pdf>

And a previous study by Open Knowledge: "Technology for Transparent and Accountable Public Finance” (attached)

And the 3 case studies:

Mexico:

<http://www.fiscaltransparency.net/resourcesfiles/files/20150831127.pdf>

Kenya:

<http://www.fiscaltransparency.net/resourcesfiles/files/20150831126.pdf>

Two USA Cities:

<http://www.fiscaltransparency.net/resourcesfiles/files/20150831125.pdf>