



European Committee for Standardization  
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CEN/ISSS WS/BII 22

## Call for Tender

### PROFILE DESCRIPTION

**Business Domain:** Pre award procurement

**Business Process:** Tendering

**Document Identification:** CEN/ISSS WS/Profile BII22

**Title:** Call for Tender

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## Document Summary

The Call for Tender profile describes a process providing electronic messaging support for the business process of inviting economic operators in a pre-awarding phase. The key aspects covered by this profile are:

- The Contracting authority has decided to invite an Economic operator to participate in a pre awarding procedure, sending the Call for Tender document, possibly with the invitation to tender information included.
- The Economic operator decides whether he participates in the tendering process, but no communication has to be sent back to the Contracting authority.

The profile additionally allows the Contracting authority to send a formal invitation to tender document in an unstructured form to the Economic operator.

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# 1 Preamble

The CEN/ISSS Workshop on business interoperability interfaces for public procurement in Europe (CEN/ISSS WS/BII) was established in order to

- Identify and document the required business interoperability interfaces related to pan-European electronic transactions in public procurement expressed as a set of technical specifications, developed by taking due account of current and emerging UN/CEFACT standards in order to ensure global interoperability;
- Co-ordinate and provide support to pilot projects implementing the technical specifications in order to remove technical barriers preventing interoperability.

To facilitate implementation of electronic commerce in a standardized way, thereby enabling the development of standardized software solutions as well as efficient connections between business partners without case by case specification of the data interchange, the workshop agreed to document the required business interoperability interfaces as profile descriptions. The end goal is to reduce the cost of implementing electronic commerce to a level that is economical for small and medium size companies and institutions.

## 1.1 Profile description

A profile description is a technical specification describing

- the choreography of the business process(es) covered, i.e. a detailed description of the way the business partners collaborate to play their respective roles and share responsibilities to achieve mutually agreed goals with the support of their respective information systems,
- the electronic business transactions exchanged as part of the business process and the sequence in which these transactions are exchanged,
- the business rules governing the execution of that business process(es), its business collaborations and business transactions, as well as any constraints on information elements used in the transaction data models
- the information content of the electronic business transactions exchanged by pointing to a given data model for each of the business transactions.

As well as determining what business transactions are used, the profile restricts their content in terms of elements and the cardinality of elements. The key standardization aspect of the profile description is thus on the organisational and semantics interoperability levels rather than on syntax within the technical interoperability level. Consequently the business transactions within a profile can be structured based on different message standards/syntax as long it contains all the necessary data elements.

Although the profile descriptions and transaction data models provided by CEN BII will be neutral of syntax, the workshop has agreed to provide specifications of how its data models may be mapped to defined syntaxes. This is done in order provide the market with implementable specifications.

It should be noted that the profile description does not attempt to address issues related to topics such as:

- the actual transmission of the electronic messages,
- security and confidentiality of the message exchange,
- integrity, authentication and auditing of information content or
- the process of implementing a solution based on the profile description.

These issues have however been addressed by other deliverables of the CEN/ISSS WS/BII (see section 2 for reference to relevant documents).

The main focus of the profile description and the associated transaction data models is to address generally expressed business requirements applicable throughout the European market. Although the profile description and associated transaction data model are designed to meet generally expressed requirements, it is still the responsibility of the users to ensure that the actual business transactions exchanges meets all the legal, fiscal and commercial requirements relevant to their business.

## 2 References

### External documents

- UN/CEFACT Modelling Methodology (available at <http://www.untmg.org/specifications/>)
- UMM Meta Model – Foundation Module Version 1.0, Technical Specification, 2006-10-06
- UMM Meta Model – Base Module Version 1.0, Technical Specification, 2006-10-06
- UML (Unified Modelling Language), version 2.0
- UN/CEFACT ebXML Core Components Technical Specifications version 2.01 – ISO 15000-5
- UN/CEFACT Business Requirements Specification version 1.5 (CEFACT/ICG/005)

### Related publications from CEN/ISSS WS/BII:

- CWA xxxx-1: Profile Overview
- CWA xxxx-1, annex A: Glossary of terms
- CWA xxxx-1, annex B: Profile Architecture
- CWA xxxx-1, annex C: Controlled Vocabulary Approach
- CWA xxxx-2: UBL-UN/CEFACT convergence (WG2)
- CWA xxxx-3: Toolbox Requirements (WG3)
- CWA xxxx-4: Pilot Support (WG4)

### 3 Business benefits and requirements

#### 3.1 Business benefits

The main business benefits to be gained by implementation of this profile are:

<b>Aspect</b>	<b>Beneficiary</b>	<b>Benefit</b>
Process automation	Contracting authority	Systematic invitation process.
Customer relations	Economic operator	Closer customer relations.
Process automation	Economic operator	Automatic evaluation of invitation to tenders and preparation of tender documents based on Call for Tender information.

#### 3.2 Business requirements

1. The Contracting authority decides to invite a reduced number of candidates based on a previous selection (either based on a pre-qualification business process or on a pre-selection list based on other criteria).
2. The Contracting authority prepares the Call for Tender as an unstructured document and optionally an unstructured Invitation to Tender and sends it to the pre-selected Economic operators.
3. The Economic operator receives and evaluates the Call for Tender and decides whether to participate or not in the tendering process.

## 4 Profile detailed description

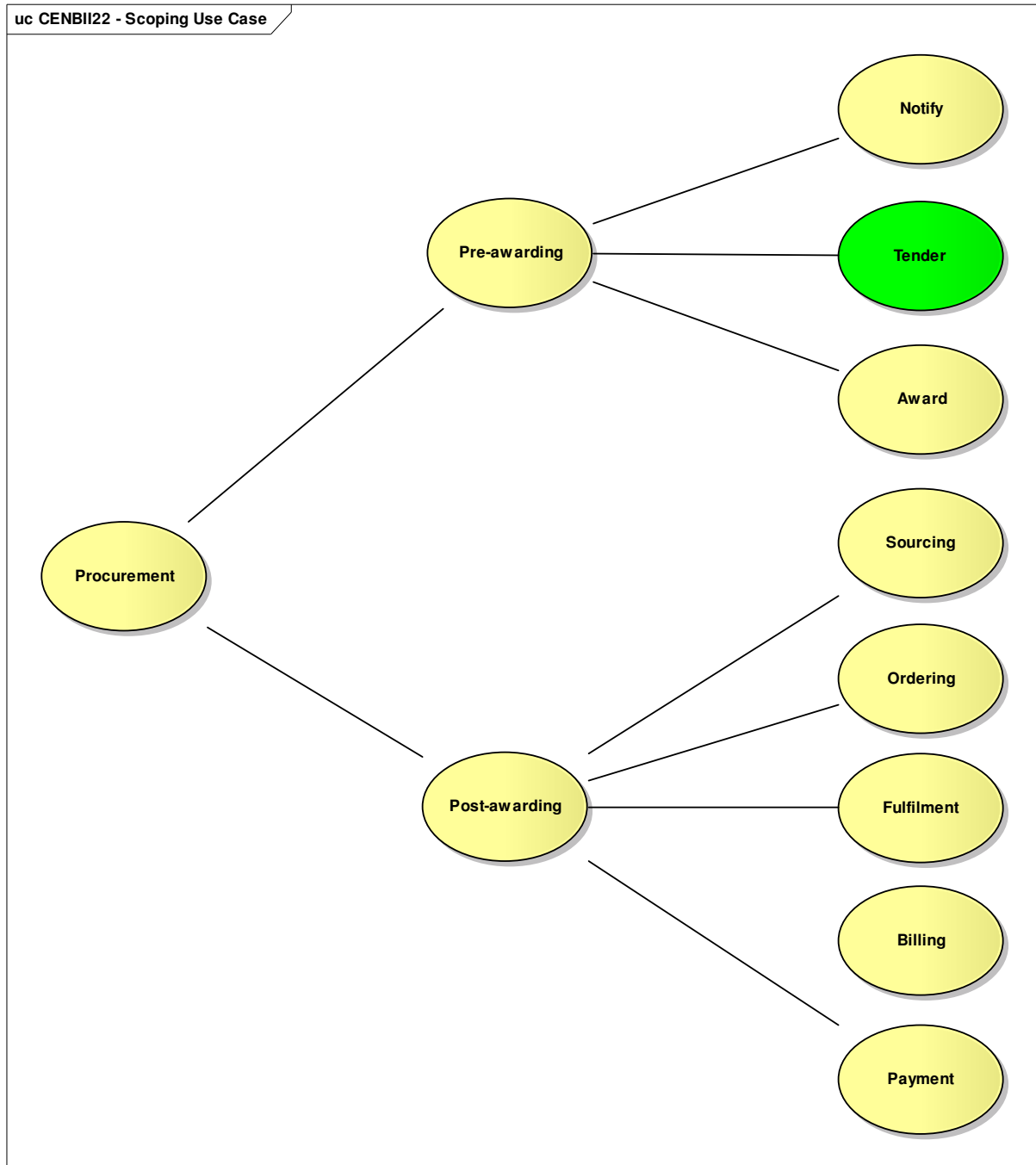
### 4.1 Context

The specification contained in this document is relevant within the following context:

<b>Categories</b>	<b>Description and Values</b>
Business Process	Negotiated Tendering with out publication procedure.
Product Classification	All types of goods and services.
Industry Classification	Buyer and Seller organisations in all sectors, public and private.
Geopolitical	Europe
Official Constraint	EU directives 2004/18/EC and 2004/17/EC, national laws and regulations.
System Capabilities	None specific.

## 4.2 Business processes in scope

Individual Pre awarding processes can be followed using different procedures. Restricted, negotiated and competitive dialogue procedures require Contracting Authorities inviting the candidates to the tendering process. Negotiated procedures require sending the invitation to tender to the selected candidates before either qualifying them.



The Call for Tender profile covers the negotiated procedures of the Tendering business processes as highlighted in the above figure.

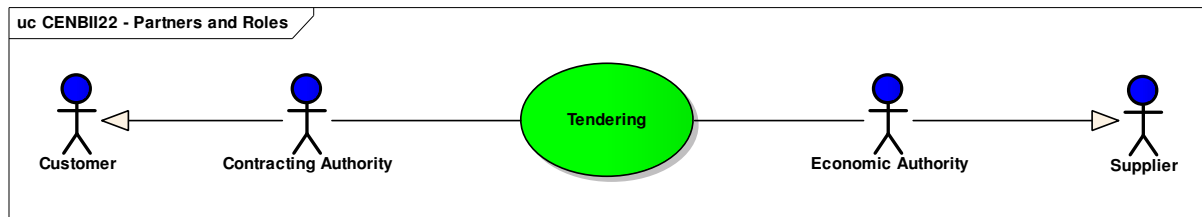
## 4.3 Partners and authorized roles

The following business partners participate in this profile, acting in the roles as defined below.

Business partner	Description
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Customer	The customer is the legal person or organization who is in demand of a product or service.  Examples of customer roles: buyer, consignee, debtor, contracting authority.
Supplier	The supplier is the legal person or organization who provides a product or service.  Examples of supplier roles: seller, consignor, creditor, economic operator.

Role	Description
Contracting authority	<p><b>'Contracting authorities'</b> means the State, regional or local authorities, bodies governed by public law, associations formed by one or several of such authorities or one or several of such bodies governed by public law.</p> <p>A 'body governed by public law' means any body:</p> <p>(a) established for the specific purpose of meeting needs in the general interest, not having an industrial or commercial character;</p> <p>(b) having legal personality; and</p> <p>(c) financed, for the most part, by the State, regional or local authorities, or other bodies governed by public law; or subject to management supervision by those bodies; or having an administrative, managerial or supervisory board, more than half of whose members are appointed by the State, regional or local authorities, or by other bodies governed by public law.</p> <p>This term has a narrower scope than the term "Customer" and is in BII treated as a customer role.</p>
Economic operator	<p>The terms 'contractor', 'supplier' and 'service provider' mean any natural or legal person or public entity or group of such persons and/or bodies which offers on the market, respectively, the execution of works and/or a work, products or services.</p> <p>The term <b>'economic operator'</b> shall cover equally the concepts of contractor, supplier and service provider. It is used merely in the interest of simplification.</p>

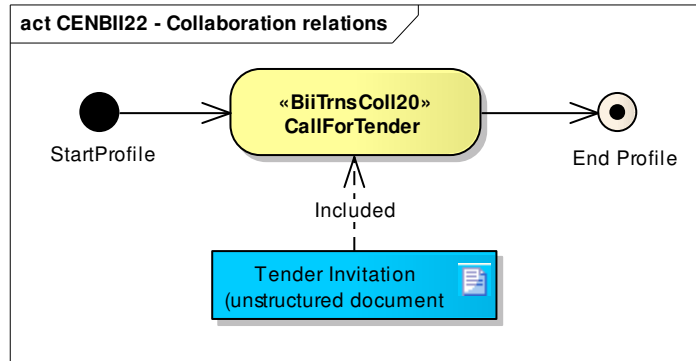


## 4.4 Choreography of business collaborations

Each business process in scope contains within itself one or more business collaborations:

Business Process	Business Collaboration(s)	Collaboration ID
Tendering	CallForTender	BiiColl020

The following diagram shows the relationships (i.e. links) between the collaborations of each business process implemented by the profile. The choreography of business collaborations defines the sequence of interactions when the profile is run within its context. Each sequence of interactions can be understood as a run-time scenario.



Description	<p>The Contracting authority sends an electronic Call for Tender document containing the information required for the Economic operator to participate in a tendering process.</p> <p>The Contracting authority may send a formal invitation to Tender as an attachment to the call for tender document.</p> <p>The Economic operator evaluates the Call for Tender information and decides whether to accept the invitation or to reject it.</p> <p>If the Economic operator accepts the invitation, the business process follows through an external process.</p> <p>If the Economic operator rejects the invitation, no notification needs to be sent back to the Contracting authority.</p>
Pre-conditions	<p>The Contracting authority has decided to use the <b>negotiated</b> tendering process.</p> <p>The Contracting authority <b>has pre-selected</b> a list of candidate Economic operators.</p>
Post-conditions	The Economic operator can proceed to prepare and submit the tender.
Remarks	The invitation to tender is for a negotiated procedure where the Economic Operator could not have all the call for tender information.

#### 4.4.1 Profile business rules

##### 4.4.1.1 Process rules

- None identified.

##### 4.4.1.2 Information constraints

- None identified.

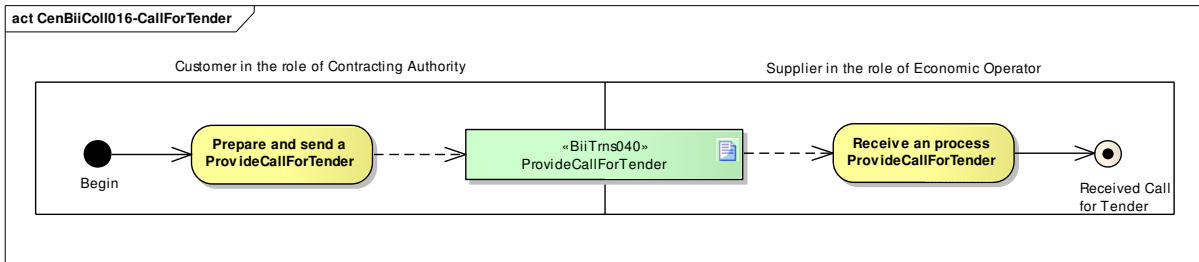
### 4.5 Business Collaboration(s) detailed description

#### 4.5.1 CallForTender collaboration

Categories	Description and Values
Collaboration ID	BiiColl020
Description	A Contracting Authority sends a Call for Tender to an Economic Operator who has or may have interest in participating.

Categories	Description and Values
Pre condition	None
Post condition(s)	An Economic Operator has received a Call for Tender information based on which he can submit a tender.
Transactions	ProvideCallForTender - BiiTrns040
Roles	Contracting Authority Economic Operator

#### 4.5.1.1 Diagram



#### 4.5.1.2 Activity description

Role	Activity	Description
<b>Main flow</b>		<b>Provide call for tender</b>
Contracting Authority	Prepare and send a ProvideCallForTender.	Contracting Authority prepares and sends the Call for Tender to the candidate Economic operator.
Economic Operator	Receives and process ProvideCallForTender.	Economic operator receives the Call for Tender and decides whether to participate or not in the tendering process.

#### 4.5.1.3 Collaboration business rules

##### 4.5.1.3.1 Process rules

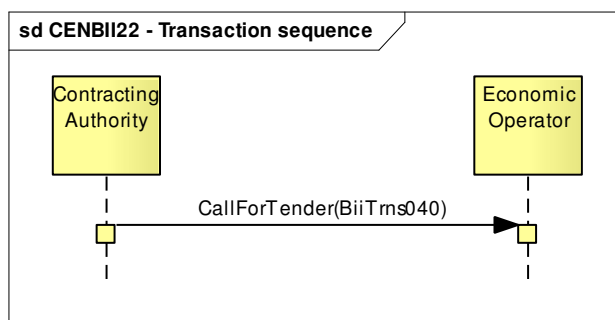
- None identified

##### 4.5.1.3.2 Information constraints

Information constraints relevant to this collaboration are captured in the referenced transaction data model(s).

## 4.6 Transaction(s) detailed description

The figure below identifies the electronic messages exchanged as part of this process and the sequence in which these documents are exchanged.



#### 4.6.1 Transaction data models

Transaction	Trns ID	Data Model	Data model ID
ProvideCallForTender	BiiTrns040	CallForTender	BiiFullTrdm040

The identified transaction is elaborated in the following chapter.

#### 4.6.2 ProvideCallForTender transaction

Categories	Description and Values
Identifier	BiiTrns040
Description	A structured electronic document sent by the Purchasing Authority to the relevant Publication Body containing details of the Call for Tender.
Partner Types	Customer Supplier
Authorized Roles	Contracting authority Publication body
Legal Implications	By sending the message the Contracting authority commits to the terms expressed in the document.
Initial Event	Prepare and send a ProvideCallForTender
Terminal event	Receive and process ProvideCallForTender
Scope	All Tender procedures.
Boundary	None

##### 4.6.2.1 Transaction business rules

- National laws and regulations and, in case of above threshold Call for Tenders, EU directives 2004/18/EC and 2004/17/EC.