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Business Interoperability Interfaces for Public Procurement in Europe - E-Catalogue - Part 102: Profile BII02 Catalogue Update

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European foreword

CWA 17028-102, **Profile BII02 Catalogue Update** was developed in accordance with CEN-CENELEC Guide 29 “CEN/CENELEC Workshop Agreements – The way to rapid agreement” and with the relevant provisions of CEN/CENELEC Internal Regulations - Part 2. It was agreed on 2015-12-02 in a Workshop by representatives of interested parties, approved and supported by CEN following a public call for participation made on 2013-02-20. It does not necessarily reflect the views of all stakeholders that might have an interest in its subject matter.

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This CEN Workshop Agreement (CWA) has been drafted and approved by the Workshop on **Business Interoperability Interfaces for Public procurement in Europe (BII)**, phase 3.

CWA 17028 is part of a set of CWAs prepared by CEN/WS BII³:

- CWA 17025:2016 Methodology and Architecture
- CWA 17026:2016 Notification profiles and transactions
- CWA 17027:2016 Tendering profiles and transactions
- CWA 17028:2016 Catalogue profiles and transactions
- CWA 17029:2016 Post-award profiles and transactions

CWA 17028 consists of:

- CWA 17028-1 Overview
- CWA 17028-101 Profile BII01 Catalogue Only
- CWA 17028-102 Profile BII02 Catalogue Update
- CWA 17028-103 BII Profile 16 Catalogue Deletion
- CWA 17028-104 Profile BII17 Multi-party Catalogue
- CWA 17028-106 Profile BII44 Catalogue Only Without Response
- CWA 17028-201 UBL Syntax Implementation Guideline for Trdm019 Catalogue
- CWA 17028-202 UBL Syntax Implementation Guideline for Trdm018 Catalogue Request
- CWA 17028-203 UBL Syntax Implementation Guideline / Trdm020 Catalogue Item Update
- CWA 17028-204 UBL Syntax Implementation Guideline for Trdm021 Catalogue Item Update
- CWA 17028-205 UBL Syntax Implementation Guideline for Trdm022 Catalogue Delete Request
- CWA 17028-206 UBL Syntax Implementation Guideline for Trdm023 Catalogue Delete Confirmation
- CWA 17028-207 UBL Syntax Implementation Guideline for Trdm055 Catalogue Request Rejection
- CWA 17028-208 UBL Syntax Implementation Guideline for Trdm072 Catalogue Subscription

¹ In order to ease the reading the CWAs provided by the CEN BII initiative, they are also made available on <http://www.cenbii.eu> together with explanatory notes and supporting material. The official version is however the version as published by CEN.

CWA 17028-209 UBL Syntax Implementation Guideline for Trdm073 Catalogue Subscription Response
 CWA 17028-210 UBL Syntax Implementation Guideline for Trdm058 Catalogue Response
 CWA 17028-211 UBL syntax implementation guideline for Trdm059 Catalogue Update Response
 CWA 17028-212 UBL Syntax Implementation Guideline for Trdm054 Multi-party Catalogue
 CWA 17028-213 UBL Syntax Implementation Guideline for Trdm068 Pre-award Catalogue
 CWA 17028-301 UN/CEFACT Syntax Implementation Guideline for Trdm019 Catalogue
 CWA 17028-302 UN/CEFACT Syntax Implementation Guideline for Trdm018 Catalogue Request
 CWA 17028-303 UN/CEFACT Syntax Implementation Guideline for Trdm020 Catalogue Item Update
 CWA 17028-304 UBL Syntax Implementation Guideline for Trdm001 Order
 CWA 17028-305 UN/CEFACT Syntax Implementation Guideline for Trdm022 Catalogue Delete Request
 CWA 17028-306 UN/CEFACT Syntax Implementation Guideline for Trdm054 Multi-party Catalogue
 CWA 17028-307 UN/CEFACT Syntax Implementation Guideline for Trdm068 Pre-award Catalogue
 CWA 17028-401 Guideline on the Usage of Classification Systems
 CWA 17028-402 Guideline on Pre-award Catalogues

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Introduction

The first CEN BII Workshop was established in May 2007 with the objective of harmonising electronic procurement in Europe. The CEN BII initiative, which now comprises a further two CEN Workshops, is a standardisation activity within CEN (European Committee for Standardisation). It provides a framework for interoperability in pan-European electronic transactions expressed as a set of technical specifications.

During the second phase of the initiative (CEN WS/BII 2) a set of technical specifications – “CEN BII Profiles” – were documented and published as five CEN Workshop Agreements (CWAs), which are currently used across Europe. The profiles are designed to facilitate effective public e-procurement based on a modular approach for implementation, with a focus on global interoperability.

The CEN BII profiles can be seen as “agreements” on message contents and business processes. The profile descriptions focus on core information elements that typically cater to the majority of user requirements applicable across Europe and lower the need for detailed bilateral agreements between the trading partners.

In its third phase (CEN WS/BII 3), which began in March 2013 with the approval of the business plan, the Workshop has focused on ensuring that all relevant aspects of e-procurement are covered, including additional business requirements coming from the new Public Procurement Directives² and alignment to other standardization efforts in the area of electronic invoicing, as well as ensuring wider recognition and adoption of its deliverables.

More information about the CEN BII initiative can be found on www.cenbii.eu.

Preview
CEN BII Profiles

² Directive 2014/24/EU on public procurement – replaces Directive 2004/18/EC (“classic Directive”), Directive 2014/25/EU on procurement by entities operating in the water, energy, transport and postal services sectors – replaces Directive 2004/17/EC (“utilities Directive”), and Directive 2014/23/EU on the award of concession contracts (new)

1 Scope

1.1 Introduction

This BII Profile 02 – Catalogue update describes electronic messages supporting the business processes for updating electronic catalogues on the customer's side. A catalogue contains specifications of products (goods and services) with their pricing. A catalogue is used to serve as a basis for ordering. This profile describes the process for sending an update message that can be applied to the catalogue implemented already on customer's side.

The key aspects covered by this profile are:

- Updating catalogue already implemented in the ordering system of a customer

1.2 Goals

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

ID	Description
G02-001	Support an efficient maintenance of information, specifically for large catalogues.
G02-002	On the Customer's side, allowing a quick and easy comparison of different items, and between different Suppliers' catalogue items (when implemented with several Suppliers).
G02-003	Simple storage and automated maintenance of item information on the Customer's side.
G02-004	Correct identification and pricing of items in the ordering process (reduced errors).
G02-005	Enable Suppliers to provide tailored item and price information.

1.3 Business environment

This profile is intended to ease the synchronization of a catalogue between the selling and the buying side, in particular to provide light-weighted transaction to update parts (existing items and item prices) of the catalogue. In this profile the selling side can be any Economic Operator and the buying side any Contracting Authority. So intended scope for this profile includes are B2G relationships.

The transactions, specified in this profile are intended to be exchanged between the procurement systems of contracting authorities and systems for catalogue management of economic operators. This means that it is expected that the parties have connected their systems to the internet, and that they have middleware in place to enable them to send and receive the transactions in a secure way, using an agreed syntax.

In this profile, only existing items in the catalogue at the customer's side can be updated. For adding new items or removing items, the profile BII01 Catalogue Only must be used. To suspend completely the usage of a catalogue the profile BII16 Catalogue Deletion must be used.

2 Requirements

2.1 High level business requirements

ID	Requirement	Ref. to goal
br02-022	It is the Catalogue Receiver's responsibility to compile the received catalogue updates message into a catalogue and confirm action through accept. It is the task of the Catalogue Receiver, as the Catalogue Receiver is responsible to incorporate the catalogue data in the procurement systems at the buying side.	G02-005
br02-012	It is the Seller's responsibility that data contained in the catalogue transaction is valid from a technical as well as business point of view. It is the task of the Catalogue Provider to gather and to compile the data for the catalogue at the selling side.	G02-004
br02-031	The Supplier (or third party acting on a Supplier's behalf – Catalogue Provider) sends a transaction to maintain information in a catalogue at the Customer site. The maintenance relates either to: Product/service specifications (not prices), or prices (not product/service specifications).	G02-003
br02-032	The transaction must contain all information necessary for its application i.e. it must not rely on the availability of external references such as a centralised repository of item information.	G02-003
br02-033	The Customer (or third party acting on a Customer's behalf – Catalogue Receiver) receives and evaluates the content of the transaction. The Customer informs the Supplier of his acceptance or rejection of the maintenance transaction.	G02-004
br02-034	The Supplier (or third party acting on a Supplier's behalf – Catalogue Provider) sends a transaction to maintain a catalogue at the Customer site.	G02-005
br02-035	The Customer (or third party acting on a Customer's behalf – Catalogue Receiver) receives and evaluates the content of the transaction. The Customer informs the Supplier of his acceptance or rejection of the transaction.	G02-003
br02-036	It should be possible to reference the catalogue transactions to a single framework agreement or any other contract or agreement.	G02-005
br02-037	A catalogue transaction without a stated validity period is assumed to be valid until cancelled.	G02-005
br02-038	The catalogue should be regarded as the Sellers standing offer, and the Seller is thereby obligated to supply the catalogue items according to the terms identified in the catalogue.	G02-005
br02-043	The Seller is obligated to provide catalogue transactions updating items when item attributes change in the targeted catalogue, according to agreements.	G02-004
br02-044	The receiver can reject a transaction if it does not conform to the agreement under which the transaction is delivered.	G02-004
br02-045	A receiver must accept and implement a transaction if it conforms to an agreement.	G02-004
br02-046	By sending a catalogue update the Catalogue Provider is legally committed by its content.	G02-002
br02-047	A catalogue update overwrites all relevant item specification information on the relevant catalogue line.	G02-005
br02-048	A catalogue update may not be used to change the information in an existing catalogue, which identifies the catalogue, e.g., catalogue Id or Name.	G02-004
br02-049	If the Catalogue Receiver rejects to change items, he rejects only these catalogue lines referenced in the rejection response and those lines only.	G02-005
br02-050	By accepting a catalogue update, the Catalogue Receiver agrees to change items in the referenced catalogue lines and those lines only.	G02-005

2.2 Key examples

2.2.1 Example 1

A contracting authority and an economic operator established a business relationship based on a framework agreement. The economic operator sent a complete catalogue that was applied to the ordering system of the contracting authority. As there were changes in the catalogue (new items, changes in the item specification, etc.), the economic operator sends an update message with updated item information. On the side of the contracting authority, the update message is checked. As it complies with the framework agreement, the update is applied to the catalogue. The economic operator is informed that the update was accepted. New orders can be placed based on the updated catalogue.

2.2.2 Example 2

A contracting authority and an economic operator established a business relationship based on a framework agreement. The economic operator sent a complete catalogue that was applied to the ordering system of the contracting authority. As there were some changes in the prices of the items, the economic operator sends an update message with updated item price information. On the side of the contracting authority, the update message is checked. As it does not comply with the framework agreement, the priced update is rejected. The economic operator is informed that the update was rejected.

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