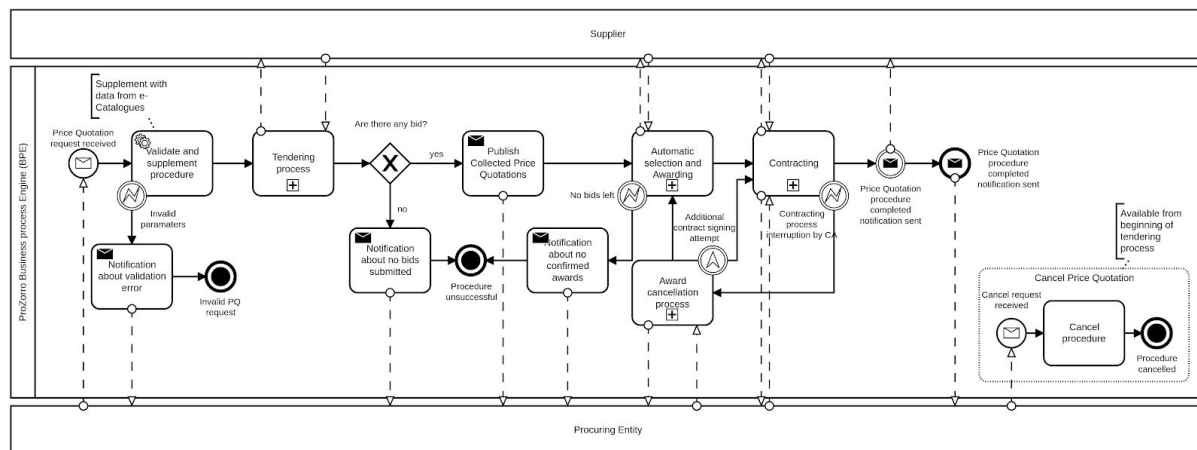# Overview

The Price Quotation procedure project was implemented in accordance with the concept developed and approved in close cooperation with the SE ProZorro team. (Described in *Annex 1 – Purchasing methodology and business process for Price Quotation*.)

This procedure is available for integration with local marketplaces which are authorized in ProZorro Market.

> **! Note:** *Electronic catalogue system "Prozorro-market"* - is a systematized database of current offers of EO's goods. This database is formed and filled by the administrator (*centralized procurement bodies*) of the e-catalog in the electronic procurement system.

Figure 5. High level business process model of Price Quotation procedure in ProZorro system

BPMN: https://cawemo.com/share/855a9a8b-450b-40d2-bc00-0fa1c1c5faf9

ProcurementMethod of this procedure is *'selective'* and **procurementMethodType**: *'priceQuotation'*.
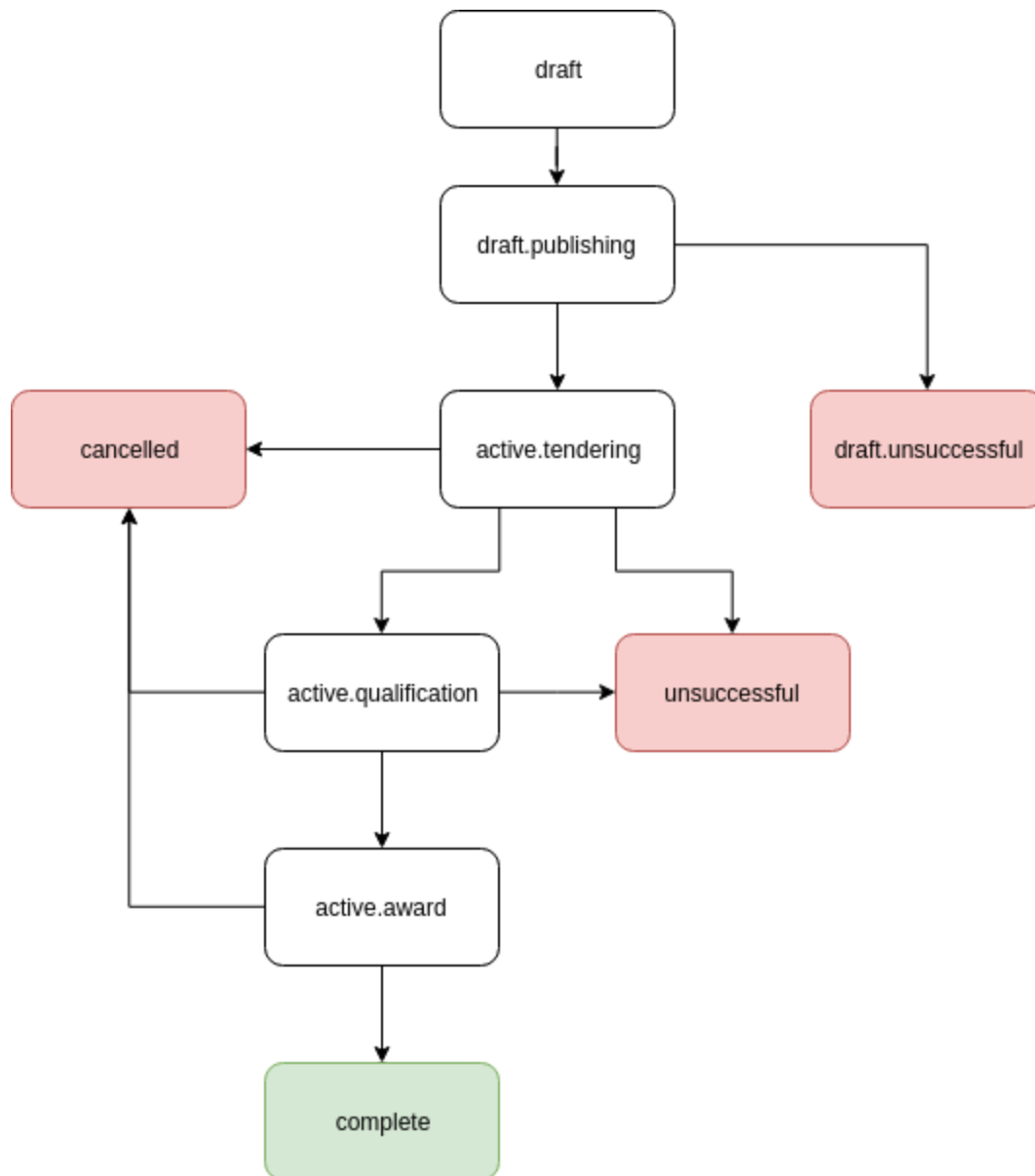
Figure 6. Price Quotation procedure status map

Table 13. Overview of procedure statuses

Status	Title	Description
draft	*Draft*	*In this status CA can make any modifications to tender until applying their electronic signature.*
draft.publishing	*Draft(Publishing)*	*Technical status. Serves as entering point for priceQuotationBot to supplement*

		procedure with data from e-Catalogues
`draft.unsuccessful`	*No bidding took place*	*Terminal status. Can be inherited if procedure didn't pass validation by priceQuotationBot*
`active.tendering`	*Submission of proposals*	*In this status EO's are able to submit their bids.*
`active.qualification`	*Qualification of the winner*	*In this status system automatically select winner with most economically advantageous bid*
`active.award`	*Proposals are reviewed*	*In this status EO has the ability to confirm/decline award and sign a contract.*
`complete`	*Finished*	*Terminal status. CA transfers procedure to this status after contract was signed by both counterparts*
`unsuccessful`	*Tendering didn't take place or no bids available*	*Terminal status. Can be inherited when no bids are available.*
`cancelled`	*Tendering cancelled*	*Terminal Status. Procedure can be cancelled by CA beginning from* `active.tendering` *at any time.*

Creating a procedure

Tender status: draft

Procedure begins when the Contracting Authority creates a Price Quotation procedure using parameters from the e-Catalogues Profile database at the marketplace user interface. Price Quotation procedure begins on the side of the marketplace in status: draft where the Contracting Authority creates and provides key information about procedure.

In **status: draft** the Contracting Authority creates and provides key information about procedure:

Table 14. Data structure of the key information about procedure available to fulfilling by the CA

Field	Description	Field from e-Catalogue
`title`	Generalized purchase name (*automatically filled in*	`profiles:title`

	from the profile name, can be modified by CA)	
description*	Description of the purchase (*automatically filled in from the profile description, can be modified by CA)*	**profiles:description**
items:description	Name of the subject of purchase *(automatically filled in from the name of the profile)*	**profiles:title**
items:deliveryAddress :postalCode	Delivery Postal code	
items:deliveryAddress :countryName	Delivery Country	
items:deliveryAddress :streetAddress	Delivery Street	
items:deliveryAddress :region	Delivery Region	
items:deliveryAddress :locality	Delivery Locality	
items:deliveryDate:en dDate	Delivery time	
items:unit:quantity	Quantity of goods or volume of work or services	
tenderPeriod:endDate	Deadline for submission of bids (*startDate is specified automatically when creating procedure*)	
profiles:id	The profile ID from the e-Catalogue selected by the CA	**profiles:id**
tender:plans	CA plan identifier	
tender:value:amount	The expected cost of purchase	
tender:value:currency	Currency	
tender:value:valueAdd edTaxIncluded	VAT (*yes / no*)	

* fields that are optional

> **! Note:** Tender period has the following validation **tenderPeriod: startDate - tenderPeriod: endDate >= 2 working days** therefore, the submission period cannot be less than two working days.

Automatically from CA profile following information being added:

Table 15. Data structure of key information about procedure automatically fulfilled by the system

Field	Description
`procuringEntity:kind`	Contracting Authority type (according to item 4.12 «Types of Contracting Authorities»)
`procuringEntity:name`	Name of the CA
`procuringEntity:address:postalCode`	CA Postal Code
`procuringEntity:address:countryName`	CA Country
`procuringEntity:address:streetAddress`	CA Street
`procuringEntity:address:region`	CA Region
`procuringEntity:address:locality`	CA Locality
`procuringEntity:contactPoint:telephone`	CA contact point Phone
`procuringEntity:contactPoint:name`	Contact point of the CA
`procuringEntity:contactPoint:email`	Contact point email address
`procuringEntity:identifier:scheme`	International organization identification scheme, by default - UA-EDR
`procuringEntity:identifier:id`	EDRPOU Code of the CA (*National State Registry of Ukrainian Enterprises and Organizations*)
`procuringEntity:identifier:legalName`	Full legal name of the CA

Tender status: draft.publishing and draft.unsuccessful

After creation CA publishes the procedure transferring to the **draft.publishing** status *by applying e-Signature*. In this status procedure will be checked by the **priceQuotationBot** robot, and filled with additional information from the e-Catalogue Profile, namely:

Table 16. Data structure of supplementary information about the procedure fulfilled by the priceQuotationBot from e-Catalogues

Field	Description	Field from e-Catalogues
`items:classification:scheme`	ДК 021:2015 - CPV Common Procurement	`profiles:classification:scheme`

	Vocabulary Classification	
`items:classification:description`	Classification description in Ukrainian	`profiles:classification:description`
`items:classification:id`	Classification id	`profiles:classification:id`
`items:additionalClassifications:scheme`	Additional classification according to item.4.18 "Directories and classifiers"	`profiles:additionalClassifications:scheme`
`items:additionalClassifications:description`	Additional classification description in Ukrainian	`profiles:additionalClassifications:description`
`items:additionalClassifications:id`	Additional classification id	`profiles:additionalClassifications:id`
`items:unit:code`	Unit code	`profiles:unit:code`
`items:unit:name`	Unit	`profiles:unit:name`
`tender:criteria:id`	Identifier of the requirement to the goods in the offer	`profiles:criteria:id`
`tender:criteria:title`	Description of the requirement for display on marketplace	`profiles:criteria:title`
`tender:criteria:requirementGroups:description`	Requirements group description	`profiles:criteria:requirementGroups:description`
`tender:criteria:requirementGroups:id`	Requirements group id	`profiles:criteria:requirementGroups:id`
`tender:criteria:requirementGroups:requirements:id`	Criteria id	`profiles:criteria:requirementGroups:requirements:id`
`tender:criteria:requirementGroups:requirements:title`	Criteria description for display on marketplace	`profiles:criteria:requirementGroups:requirements:title`
`tender:criteria:requirementGroups:requirements:expectedValue`	Describes requirement as precise value	`profiles:criteria:requirementGroups:requirements:expectedValue`
`tender:criteria:requirementGroups:requirements:minValue`	Describes requirement as value not less than	`profiles:criteria:requirementGroups:requirements:minValue`
`tender:criteria:requirementGroups:requirements:maxValue`	Describes requirement as value not more than	`profiles:criteria:requirementGroups:requirements:maxValue`

|		
`tender:criteria:requirementGroups:requirements:unit_code`	Criteria Unit Code	`profiles:criteria:requirementGroups:requirements:unit_code`
`tender:criteria:requirementGroups:requirements:unit_name`	Criteria Unit	`profiles:criteria:requirementGroups:requirements:unit_name`
`shortlistedFirms:scale`	Economic Operator type	`categories:suppliers:scale`
`shortlistedFirms:name`	Name of the EO.	`categories:suppliers:name`
`shortlistedFirms:address:postalCode`	Postal code	`categories:suppliers:address:postalCode`
`shortlistedFirms:address:countryName`	Country	`categories:suppliers:address:countryName`
`shortlistedFirms:address:streetAddress`	Street	`categories:suppliers:address:streetAddress`
`shortlistedFirms:address:region`	Region	`categories:suppliers:address:region`
`shortlistedFirms:address:locality`	Locality	`categories:suppliers:address:locality`
`shortlistedFirms:contactPoint:telephone`	Phone	`categories:suppliers:contactPoint:telephone`
`shortlistedFirms:contactPoint:name`	Contact point of the EO	`categories:suppliers:contactPoint:name`
`shortlistedFirms:contactPoint:email`	Contact point email address	`categories:suppliers:contactPoint:email`
`shortlistedFirms:identifier:scheme`	International organization identification scheme, by default - UA-EDR	`categories:suppliers:identifier:scheme`
`shortlistedFirms:identifier:id`	EDRPOU Code of the EO (*National State Registry of Ukrainian Enterprises and Organizations*)	`categories:suppliers:identifier:id`
`shortlistedFirms:identifier:legalName`	Full legal name of the EO	`categories:suppliers:identifier:legalName`

After successful validation **priceQuotationBot** transmit procedure to `status:`

active.tendering providing shortlisted (`shortlistedFirms`) Economic Operators with ability to submit Bid proposals and informing them about Price Quotation request.

> **!Note:** `shortlistedFirms` - is a list of EOs that are qualified in the ProZorro e-Catalogues and have the **status: active**.

Tendering process

BPMN: *https://cawemo.com/share/af749cd9-4df8-4364-b75a-9f4a1702d084*
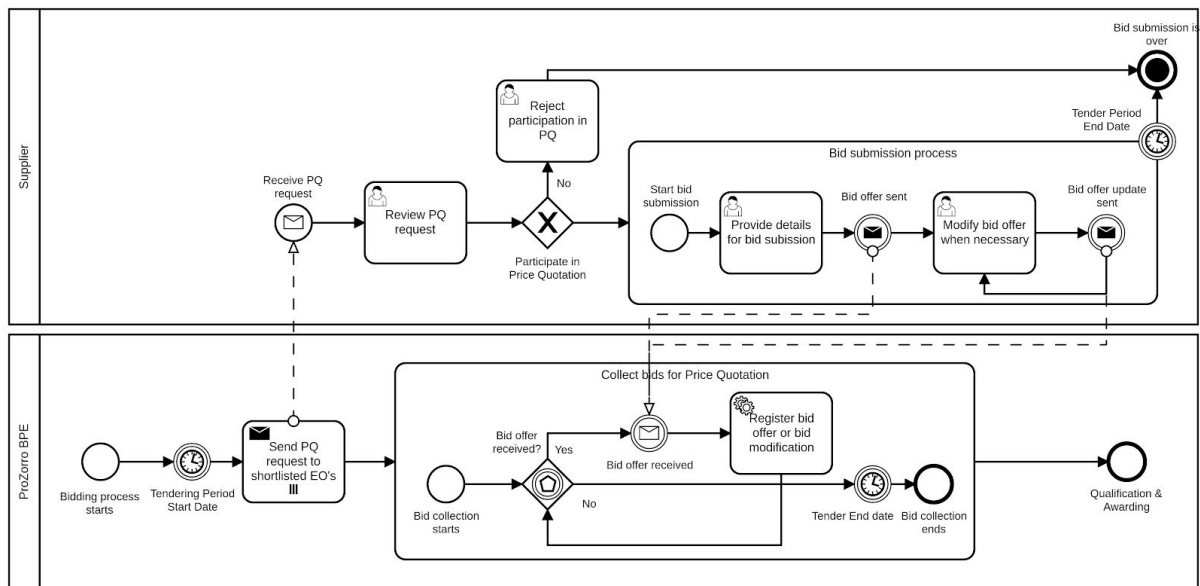
Tender status: active.tendering

While being in **status: active.tendering** shortlisted EOs have time period with at least two working days to make decision about participation in request and submit their bid in following structure:

Table 17. Data structure of the bid

Field	Description
`bid:requirementResponses:requirement`	Requirement id
`bid:requirementResponses:value`	Requirement value
`bid:value:amount`	Price for unit
`bid:value:currency`	Currency

`bid:value:valueAddedTaxIncluded`	VAT (*yes/no*)
`bid:tenderers:scale`	Type of the EO
`bid:tenderers:name`	Name of the EO
`bid:tenderers:address:postalCode`	EO Postal Code
`bid:tenderers:address:countryName`	EO Country
`bid:tenderers:address:streetAddress`	EO Street
`bid:tenderers:address:region`	EO Region
`bid:tenderers:address:locality`	EO Locality
`bid:tenderers:contactPoint:telephone`	EO contact point Phone
`bid:tenderers:contactPoint:name`	Contact point of the EO
`bid:tenderers:contactPoint:email`	Contact point email address
`bid:tenderers:identifier:scheme`	International organization identification scheme, by default - UA-EDR
`bid:tenderers:identifier:id`	EDRPOU Code of the EO (*National State Registry of Ukrainian Enterprises and Organizations*)
`bid:tenderers:identifier:legalName`	Full legal name of the EO

Upon completion of the `tenderPeriod`, the procedure may change its `status` to: `active.qualification` or `unsuccessful`, depending on the presence or absence of bidders submitting their bids.

Qualification and Awarding

*Figure 8. Qualification and Awarding business process model*
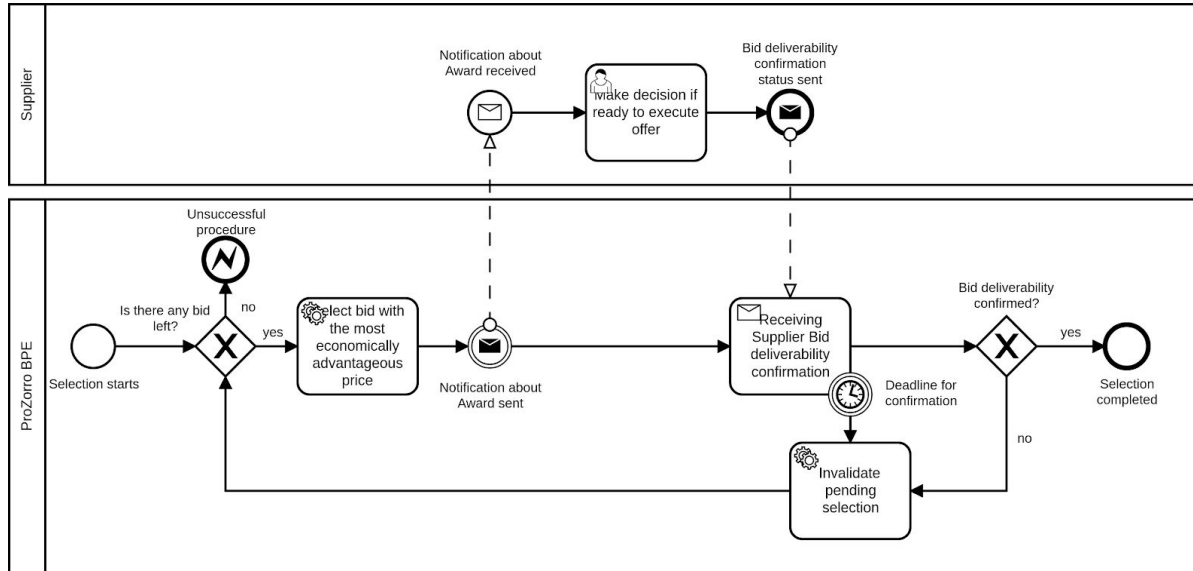
Tender status: active.qualification and award status: pending

Subsequent switchover in the procedure is **status: active.qualification**. It is being activated if there is at least one proposal.

> **! Note:** In case if no bids were submitted, the system will switch procedure to **status: unsuccessful**.

During this status the system automatically determines the **award** for the bid with the most economically advantageous bid.

Figure 9. Award status map
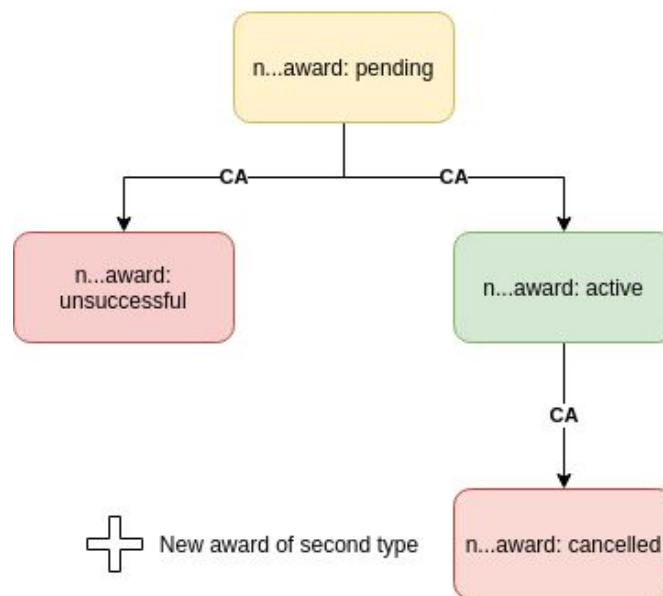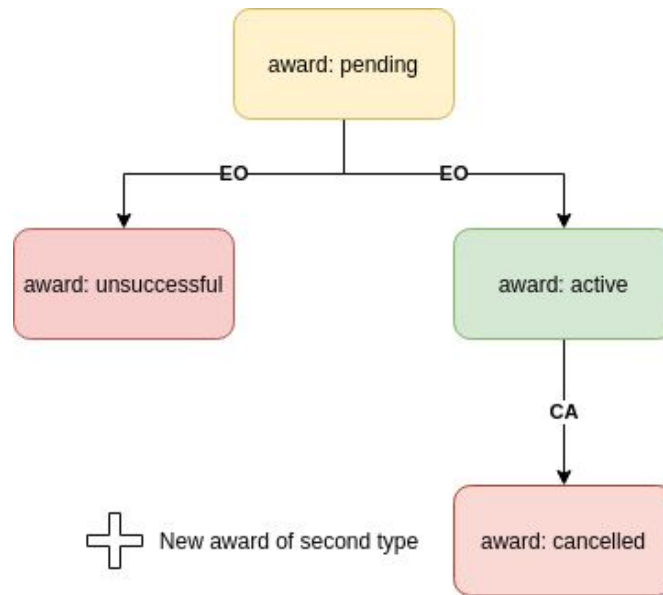
For this bid system creates the first **award** with **status: pending** and switching procedure to **status: active.award** where EO has *two working days* to either confirm or decline the **award**.

Tender status: active.award and award status: active or unsuccessful

The EO confirms the **award** by changing **status** to **active** or refuses by changing to **unsuccessful**, after which an **award** is created for the next most economically advantageous bid.

Contracting process and procedure terminal statuses

Tender status: complete

After EO confirms **award** by changing it **status** to **active** contracting process become available and can be completed in two ways:

1. Use of e-Contracting solution (*Optional for CA*). Detailed description of e-Contracting solution please find in *Annex 4 - e-Contracting solution in ProZorro: Report from development*.

2. Use of standard contracting process for ProZorro.

*Figure 10. Contracting business process model*

BPMN: https://cawemo.com/share/05b1e66e-4724-4e14-ade6-eb8716683a19
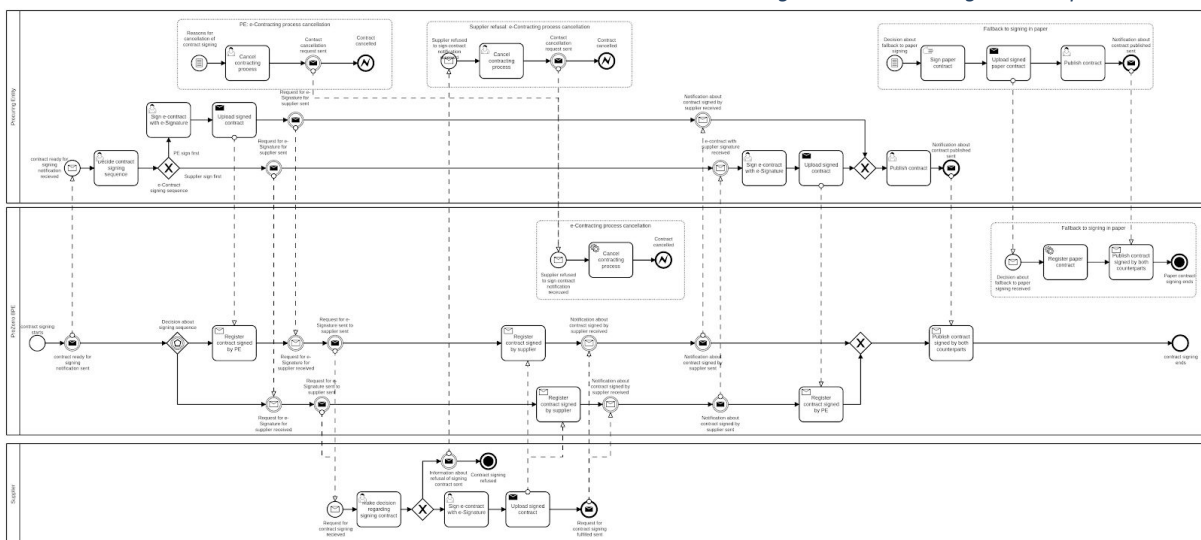
Contracting process foresees preparing a **contract** in the system in **status: pending** for signing by e-Signatures from both counterparts. After a contract was signed by both sides, the **contract** being transferred to **status: active**, CA can finish the procedure by transferring its **status** to **complete**.

Award status: cancelled
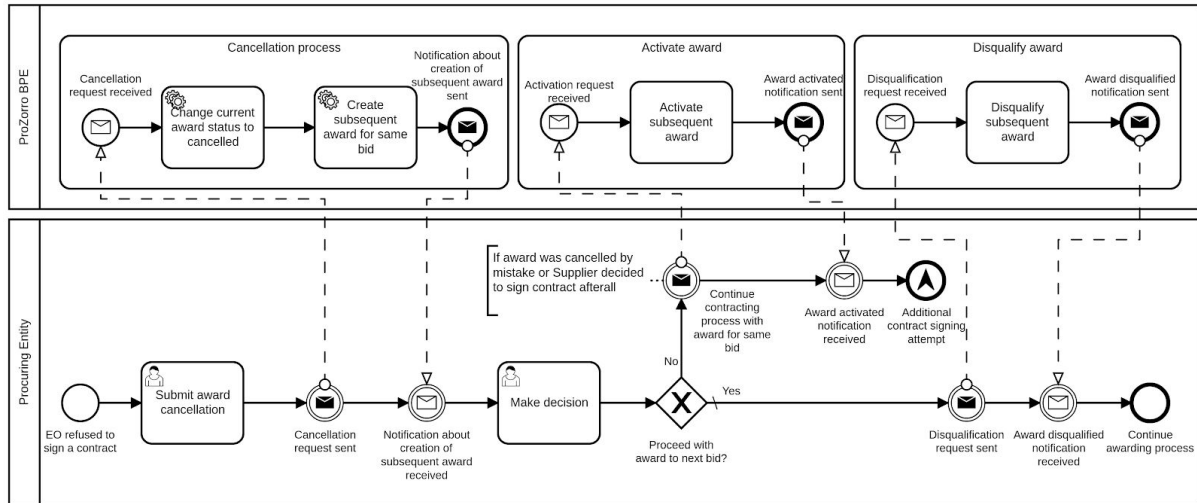
After EO switching the **award** to **status: active**, control over the **award** transferred to CA who has the opportunity to cancel the **award** by changing its **status** to **cancelled** if *EO would decline to sign a contract*.

By changing **award status** to **cancelled**, the system creates the following **award** with **status: pending** on the same bid where the CA can upload documents (*optionally*). Only the CA has control over this award.

The second (*and subsequent*) award for the same bid can be transferred by the CA to **status: active** or **unsuccessful**. If it is translated into **status: unsuccessful** - **award** goes to the next most economically advantageous bid.

The second (*and subsequent*) award can also be transferred by the CA from **active** to **cancelled** as well as the first.

> **! Note:** If there are no bids in the procedure after transferring **award** to **status**: **unsuccessful**, then the **procedure** acquires **status: unsuccessful**.

Tender status: Cancelled and unsuccessful

The CA has the opportunity to cancel the Price Quotation procedure in the following statuses:

`active.tendering`
`active.qualification`
`active.awarded`

The procedure is cancelled according to the standard cancellation procedure functionality in ProZorro system.

Procedure automatically goes to **`unsuccessful`** status from the status of the procedure and in cases:

`active.tendering` - if no bid has been submitted before **`tenderPeriod: endDate`**.
`active.qualification` - if the CA has cancelled the last bid.