Tendering strategy: systematic control of purchasing competitions

The tendering strategy is the plan defined in advance with which a company structures, conducts and evaluates purchasing competitions. It determines which items are awarded, in which procedure format, with which criteria and with which objectives. A well-thought-out tendering strategy lowers procurement costs, reduces supplier risks and accelerates the award process. Without one, tenders frequently run in an unstructured manner, deliver offers that are difficult to compare and tie up unnecessary resources.

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Key facts at a glance

01 The tendering strategy bindingly defines in advance the procedure type, intensity of competition, award criteria and timeline of a tender.

02 It differentiates according to the question at hand: price, performance, technology or supplier selection each take centre stage.

03 Typical formats are open tender, controlled competition, RFQ (Request for Quotation), RFI (Request for Information) and RFP (Request for Proposal).

04 Award criteria are defined as a weighted utility value analysis, typically with shares for price, technology, logistics and quality.

05 Key success factors are robust specifications, clean data quality and a realistic field of bidders, frequently three to six suppliers.

06 The strategy is closely interlinked with supplier management, procurement portfolio analysis and operational tender management.

Definition: tendering strategy

The tendering strategy describes the overall planning concept for a procurement competition: objectives, choice of procedure, participant group, communication rules, evaluation logic and draft contract are bindingly fixed before the tender starts. It is therefore the link between the procurement strategy and operational tender management.

Distinction from the tender itself

The tender is the document or process by which offers are solicited. The tendering strategy, by contrast, answers the questions that precede it: why the tender is being run, in what form, with whom and according to which rules? A tender without a strategy easily degenerates into a pure price comparison and neglects total cost of ownership, supply chain security and quality requirements.

Position within the procurement process

The strategy typically follows the demand analysis and an outsourcing potential analysis or procurement portfolio analysis, which clarifies which items should be competitively procured in the first place. Strategy and tender are followed by offer evaluation, negotiation, award and subsequent supplier management. The tendering strategy is thus a central control instrument of strategic procurement, equally in the German-speaking SME sector and in large-scale industry.

Methods and approach in tendering strategy

The structure of a tendering strategy in practice usually follows a multi-stage process: objective definition, market analysis, choice of procedure, criteria system and schedule planning. Each stage provides decision documents and prevents ad hoc course corrections during the run – a frequent cause of delays and loss of credibility with suppliers.

Choosing objectives and tender formats

First, it is clarified which objective the competition pursues: price optimisation for standard parts, technology acquisition for innovations or building a new supplier base. The format follows from this. An RFQ is suitable for clearly specified parts, an RFP for statements of work with scope for solutions, an RFI for market sounding. For digitalisation or sustainability questions, for example relating to life cycle assessment (LCA), the process often begins with an RFI round.

Competition design and participant group

The number of invited suppliers determines competitive pressure and workload. In practice, three to six qualified bidders has proven effective: below this, competition is weak; above this, offer quality declines and coordination effort increases. Pre-selection is based on supplier classification and the results of credit checks. The handling of requests for additional documentation – such as certificates or references – is also regulated in advance in order to avoid queries during the run.

Defining criteria and the evaluation model

Evaluation criteria are documented before the opening of offers as a utility value analysis with fixed weightings. Typical blocks are price and cost transparency, technology and quality, logistics and flexibility, as well as sustainability and compliance. Framework conditions such as payment terms, delivery schedule commitments or the required catalogue structure for later order processing also belong in the criteria. This allows offers to be compared objectively and the decision to be traceable both internally and externally.

KPIs for controlling the tendering strategy

A tendering strategy is only effective if its results are measurable. Key indicators show whether the competition delivers the desired cost efficiency, quality and speed – and where the design needs to be readjusted.

Cost and savings indicators

The key measure is the realised saving versus reference prices or last-supplier prices, in practice frequently in the single-digit to low double-digit percentage range for first tenders of standard services. In addition, a cost–benefit analysis is applied per tender: it weighs internal processing costs, tool costs and supplier effort against the benefits achieved and prevents small volumes from being tendered in an oversized manner.

Process and quality indicators

Process-side relevant measures are lead time from approval to award, the quote rate of invited suppliers and the share of complete, robust offers. A data quality score for incoming offer data shows how comparable and machine-processable the responses are. After the award, the quality and delivery reliability of newly appointed suppliers demonstrate whether the evaluation criteria were correctly set.

Indicators by strategy type

In price competitions, savings and TCO effects dominate; in technology tenders, criteria such as innovation share and time to market; in risk tenders, the distribution of volume across multiple sources. KPI selection should therefore be deliberately aligned with the respective objective of the tendering strategy, not uniform across all cases.

Risks and controls in the tendering strategy

Tenders carry operational, legal and strategic risks: unclear specifications, collusive agreements, dependence on the low-cost supplier or a lack of traceability of the decision. Controls and documented processes significantly mitigate these risks.

Specification and market risks

Incomplete drawings or fluctuating material approval requirements lead to non-comparable offers and post-award renegotiations. Countermeasure: robust requirement specifications, binding drawing statuses and a defined process for offer queries. An overly narrow participant group also carries risk – if one bidder drops out, competition is lost.

Conduct and compliance risks

Price fixing, cartel-law grey areas and conflicts of interest require clear ground rules: uniform information to all bidders, separation of roles between technical evaluation and the award decision, and documentation of every deviation. Deviations from the tendered specification require formal deviation

approval before they are taken into account in the evaluation.

Implementation and renegotiation risks

The strongest strategy loses its value if implementation fails. The most valuable resource is therefore consistency: once defined criteria and procedural rules are not changed retrospectively, and renegotiations are only permitted within a narrow range of allowed points. Delivery problems arising from the low-cost supplier are safeguarded against in the evaluation model through capacity and financial checks – such as credit checks.

Current developments in tendering strategy

Tendering strategies are changing as a result of digitalisation, supply chain pressure and sustainability requirements. Electronic platforms accelerate the process, while resilience and ESG criteria relativise the pure price criterion.

Digitalisation and automation

E-sourcing platforms and AI-supported tools support the creation of tender documents, offer evaluation and supplier research. The degree of invoice automation and integration with a supplier network show that downstream processes are also expected to be digital – tenders should therefore address interface requirements such as OCI (Open Catalog Interface) for catalogue orders at an early stage. What remains important: automation accelerates, but does not replace, the strategic decision on format and criteria.

Resilience and sustainability as criteria

Supply chain disruptions have pushed multi-sourcing strategies and regionality to the fore. Sustainability requirements – such as emissions data along the supply chain or life cycle assessment (LCA) information – are increasingly included as weighted criteria in utility value analyses. Contract arrangements such as warranty provisions or price adjustment clauses capable of escalation are also gaining in importance.

Combination with contract and control models

Tendering strategies do not end with the award. Framework agreements with defined payment term adherence targets, escalated dunning processes for late payment on the supplier side or delivery schedules coupled with production control are increasingly negotiated as part of the tender itself. In this way, the competition becomes the starting point of a long-term, measurably controlled supplier relationship.

Typical metrics

Metric	Typical value

Realised saving	typically 3–15 % *versus reference or last-supplier price, depending on the competitive situation*
Quote rate	>= 80 % *share of invited suppliers submitting a complete offer*
Tender lead time	typically 4–12 weeks *from approval to award, depending on complexity*
Data quality score	> 90 % *share of machine-comparable, complete offer data*

Practical example

A medium-sized mechanical engineering company tendered palliative but urgently needed milled parts individually across several sites on an annual basis and received highly volatile prices. It developed a tendering strategy that bundled volumes, introduced two evaluation stages (RFI for technical suitability, followed by RFQ with a utility value analysis) and established binding logistics requirements.

- Bundling of site requirements into a single tender package with a two-year term and option to extend
- Advance fixing of criterion weightings: 50 % price and TCO, 30 % technology and quality, 20 % logistics and flexibility
- Offer evaluation using a data quality score in order to weed out incomplete offers at an early stage
- Award to two suppliers (70/30 split) for risk diversification, plus definition of payment terms and delivery schedule processes in the contract

Conclusion

The tendering strategy determines the economic success of a purchasing competition – long before the first offer is received. It combines objectives, procedure format, participant group and evaluation logic into a traceable plan and thereby creates the basis for objective award decisions. Companies with a clear strategy achieve in practice not only better prices but also more stable supplier relationships and shorter lead times. The prerequisites are robust specifications, clean data and disciplined tender management. Those who regularly adapt their tendering strategy to market conditions, resilience and sustainability requirements make it a lasting lever in strategic procurement.

Frequently asked questions

? What is a tendering strategy?

A tendering strategy is the plan defined in advance for a purchasing competition: it defines the objective, procedure format, participant group, award criteria and timeline. It ensures that offers are

comparable and that the award decision is made in a traceable manner. It is therefore the link between the procurement strategy and operational tender management.

? What types of tender exist in procurement?

Common formats are RFQ (Request for Quotation) for clearly specified services, RFP (Request for Proposal) where there is scope for solutions, RFI (Request for Information) for market sounding, as well as auctions and controlled competitions. The choice depends on the question at hand, the degree of specification and the market situation. In practice, RFI and RFQ are frequently combined.

? How many suppliers should be included in a tender?

In practice, three to six qualified bidders has proven effective. Fewer suppliers weaken competition; more increase the workload and often reduce the quality of offers. Pre-selection should be based on supplier classification, credit checks and references.

? What criteria belong in a tender evaluation?

Typical criteria blocks are price and total cost of ownership, technology and quality, logistics and flexibility, as well as compliance and sustainability. The criteria are fixed with weightings before the opening of offers, often as a utility value analysis. Framework conditions such as payment terms or required system integrations also belong in there.

? How long does an industrial tender take?

The duration depends on complexity and volume. Standard parts are awarded in practice within a few weeks; complex technology services require several months. A clear tendering strategy with defined milestones and advance requests for documentation significantly shortens the lead time.

? What distinguishes tendering strategy from tender management?

The tendering strategy sets out the conceptual decisions: why, how and with whom the tender is run. Tender management operates the process on an operational level: creating documents, communicating with suppliers, evaluating offers, preparing the award. The two levels interlock and require clear responsibilities.

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