Clarification Round: the clarification round in the procurement process

The clarification round is a structured phase in the procurement process in which buyers and suppliers clarify open questions about a request for quotation before bids are submitted in a binding manner. Its purpose is to eliminate ambiguities regarding specifications, quantities, deadlines and terms and to ensure the comparability of bids. In practice, it frequently takes the form of a moderated question-and-answer catalogue between the issue of a request for quotation and the suppliers' binding offer.

As of October 2026 · amplifa-marketplace.ai/en/glossary/clarification-round

Key facts at a glance

01 The clarification round is a formal clarification phase between the request for quotation and bid submission.

02 It reduces subsequent claims, misinterpretations and later negotiation delays.

03 Typically, questions are collected centrally and the answers are disclosed to all bidders to preserve equality of opportunity.

04 In practice, a clarification round frequently lasts from a few days to two weeks, depending on the complexity of the procurement project.

05 A documented clarification round process creates legal certainty and serves as an important evidentiary basis in audits and disputes.

Definition: clarification round

The clarification round denotes the scheduled phase in the award process in which suppliers raise follow-up questions about a tender or request for quotation and the buyer answers them in a binding manner. It is neither a negotiation nor a bid dialogue, but serves exclusively to clarify questions of understanding regarding the services, the schedule and the contractual terms.

Distinction from negotiation

Unlike a negotiation, no prices or terms are negotiated in the clarification round. The sole aim is to establish a uniform understanding among all parties of the scope of the order. Price discussions and negotiations on terms only follow after the bids have been received, frequently on the basis of a binding offer. This clean separation protects the comparability of bids and avoids accusations of unequal treatment of bidders.

Legal framework

In public procurement law, clarification rounds or clarification discussions are expressly provided for in the relevant procedural rules; in the private sector they can be freely shaped contractually. In both cases the following applies: answers should be given in writing and documented, as verbal assurances are open to interpretation and prone to dispute. For complex services, it is advisable to involve the specialist department, quality and legal to avoid contradictory information. The precise design should always be examined on a case-by-case basis.

Methods and procedure in the clarification round

A structured process is crucial for efficiency and fairness. In practice, a multi-stage process has proven its worth, ranging from the collection of questions to the binding documentation of answers.

Collecting and prioritising questions

Suppliers submit their questions within a defined deadline via a defined format, frequently a standardised form or a question-and-answer table. The buyer collects, reviews and prioritises the questions thematically – for example by specification, logistics, quality or contract document. Duplicate or related questions are bundled; good duplicate detection at question and data-list level saves all parties time.

Preparing and communicating answers

Every answer is coordinated internally – technically with engineering or development, commercially with controlling or sales, and on standards questions with quality. Best practice is to make the answers available to all participating bidders in anonymised form so that no one gains an advantage through early information. Changes to specifications or quantities are communicated as an official annex supplement with a new deadline.

Deadlines and escalation

In practice, five to ten working days are typically allocated for the question phase, and more for complex technology tenders. If answers trigger fundamental changes, the bid deadline is frequently extended. If questions remain open or answers arrive late, the supplier should report this in a documented manner – this protects against later claims and strengthens the position in bid evaluation. An escalation route with a named responsible person prevents clarification needs from being left at the interface between the specialist department and procurement.

Key KPIs and success factors of the clarification round

The quality of the clarification round can be measured. Relevant metrics relate both to the process itself and to its impact on downstream phases such as bid evaluation and order execution.

Process-related metrics

Typical metrics are the number of questions submitted per request for quotation, the average response time and the proportion of questions fully answered before the deadline. In practice, answer rates above 95 per cent and response times of a few working days are considered effective. The number of follow-up question rounds is also an indicator: more than two rounds often point to unclear specifications or poor request quality.

Impact on claim rate and delivery reliability

A clean clarification round has an impact on later phases: it typically reduces the claim and change rate in order execution and improves suppliers' adherence to delivery deadlines. Supplier ratings can be used to record bidders' questioning behaviour and susceptibility to claims in the long term. The rate of awards that are aborted or re-tendered as a result of specification errors is also a meaningful indicator.

Success factors from practice

Decisive factors are a clear timetable, a responsible coordinator on the buyer's side and standardised question-and-answer formats. Specialist departments should be involved early, particularly at interfaces with engineering, quality and logistics. Documentation in a central system – not in scattered email threads – enables analysis and supports process optimisation in procurement.

Risks and controls in the clarification round

Unclear or unfair clarification processes carry considerable risks: from suppliers' miscalculations to delays and legal disputes. Controls and clear rules minimise these dangers.

Misinformation and design premises

Incorrect or incomplete answers can lead to miscalculations that later fall back on the buyer as claims. It is therefore important to distinguish binding information from mere hints. At the same time, the following applies: a supplier who does not query recognisable contradictions in the solicitation documents can rarely rely on them later – buyers should make this clear in the conditions of the request for quotation.

Equality of opportunity and confidentiality

Answers sent to individual bidders only violate the principle of equal treatment and can lead to formal complaints in the public sector. In the B2B environment, reputational damage is at the very least at stake. Confidential content such as technical drawings or cost structures – for example in the context of should-costing considerations or target costing – requires a clearly agreed confidentiality arrangement

before it is shared in the clarification process.

Documentation and traceability

Every question and answer should be documented with date, version and responsible person. In disputes over specifications or deadlines, this evidence is decisive. Changes to the basis of the bid are recorded as formal annexes with a version status and referenced in a binding manner with the bid submission. This discipline also pays off in later audits and in risk analysis for ongoing projects.

Current developments: digitalisation and new procurement models

Clarification rounds are increasingly moving to digital platforms and are integrated into dynamic procurement formats. This changes the process, the pace and the requirements for documentation.

Digital Q&A workflows

Modern e-sourcing and marketplace solutions offer integrated question-and-answer workflows with automated distribution to all bidders, deadline monitoring and version-controlled filing. This reduces email loops and typically significantly accelerates the process. In addition, AI-supported functions help with preparation: they detect unclear or contradictory wording in specifications before the request goes out and suggest frequently asked questions with stored standard answers.

Clarification rounds in dynamic procedures

In faster procedures such as the reverse auction, the clarification window is naturally shorter – here specification quality must be particularly high before the start, as there is hardly any room for follow-up questions during the auction. For long-running requirements, for example under a call-off agreement, clarifications are handled on a rolling basis instead: specification and logistics questions are clarified in regular review meetings, supplemented by metrics from supplier rating.

Early involvement and innovation

In innovative procurement approaches – for example supplier innovation or early supplier involvement – the clarification round evolves into a dialogue-oriented format: suppliers contribute technical solution proposals, alternative materials or ideas for packaging reduction at an early stage. The distinction between clarification and cooperative development must then be cleanly regulated contractually, especially with regard to intellectual property and confidentiality.

Typical metrics

Metric	Typical value
Clarification round answer rate	> 95% *Proportion of questions fully answered before the deadline*

Average response time	< 5 working days *typical benchmark for standardised requests for quotation*
Number of clarification rounds per request for quotation	<= 2 *multiple rounds indicate unclear specifications*
Claim rate after contract award	< 5% *typically decreases significantly with cleanly documented clarification*

Practical example

A medium-sized mechanical engineering company tenders the manufacture of complex steel assemblies internationally. During the clarification round, several suppliers raise questions about heat treatment, required test witnesses and the disclosure of transport costs in the bid structure. The buyer consolidates the questions, answers them within five working days and makes the answers openly available to all bidders. A question about sample testing leads to an addition to the test plan; the bid deadline is subsequently extended by one week.

- Standardised question-and-answer format with a ten-working-day deadline before bid submission
- Central, documented answers disclosed to all bidders, including updated annexes
- Involvement of engineering and quality to avoid contradictory information
- Extension of the bid deadline as a consequence of material changes to the specification

Conclusion

The clarification round is an apparently small but highly effective element of professional procurement. It ensures that all suppliers calculate on the same informational basis, reduces subsequent claims and accelerates the negotiation phase. Its success depends less on tools than on discipline: clear deadlines, standardised formats, written and documented answers and the consistent involvement of the specialist departments. Digitally integrated Q&A workflows make this discipline measurable and auditable. Anyone who designs clarification rounds systematically reduces risk and creates the basis for robust, comparable bids.

Frequently asked questions

? What is a clarification round in procurement?

The clarification round is the formal clarification phase between the issue of a request for quotation and the submission of bids, in which suppliers raise questions and the buyer answers them in a binding manner. It typically concerns specifications, quantities, deadlines and contractual terms. Unlike negotiations, no prices or terms are negotiated. The answers should be documented and, as a rule, made openly accessible to all bidders.

? How does a clarification round in tenders work?

Suppliers submit questions up to a defined deadline in a standardised format. The buyer reviews and answers them after internal alignment with the relevant departments and communicates the answers – usually anonymised – to all participants. Changes to the basis of the bid are added as formal annexes, frequently accompanied by an extended bid deadline. The entire process is documented in a version-controlled manner.

? Why is the clarification round before bid submission important?

It creates a uniform basis for pricing and makes bids genuinely comparable. Otherwise, open questions lead to risk mark-ups by suppliers, subsequent claims or miscalculations. Moreover, a clean, non-discriminatory clarification round avoids formal errors and strengthens the buyer's position in later disputes.

? How long does a clarification round last?

In practice, five to ten working days are usually allocated for the question phase; for complex technology tenders, more. After the answers, an extended bid deadline of several days to weeks often follows. More than two clarification rounds per request for quotation are considered an indication of deficiencies in the solicitation documents.

? What is the difference between a clarification round and a bid dialogue?

The clarification round deals with questions of understanding regarding the basis of the bid – scope of services, standards, deadlines, the contract document. The bid dialogue takes place after the bids have been received and addresses prices, terms and delivery arrangements. A clear separation of the two phases preserves fairness towards all bidders and the traceability of the award process.

? Must clarification round answers be communicated to all bidders?

In public procurement law, the principle of equal treatment is mandatory; answers must regularly be disclosed to all participants. In the private B2B sector this is not mandatory, but in practice it is established best practice to ensure equality of opportunity and build trust. Sensitive content such as confidential drawings should only be shared after confidentiality agreements have been put in place.

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