# Supplier Longlist: From Market Screen to Structured Supplier Longlist

The supplier longlist is the complete, pre-filtered overview of all potentially suitable suppliers for a specific procurement project or category. It forms the first stage of the selection process, before pre-selection produces the shortlist. For technical procurement professionals, it is the central working tool for systematically building market coverage, risk diversification and negotiating leverage.

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### Key facts at a glance

01 The supplier longlist typically captures 15 to 50 or more potential suppliers per requirement or category.

02 It is created through market screening from own master/ERP data, supplier databases, trade fair contacts and internal knowledge of the specialist departments.

03 Criteria for longlist creation are rough and filtering: industry, technology, capacity, region, certifications and financial situation.

04 The shortlist is derived from the longlist through structured pre-selection and is invited to tender (RFQ/RFI).

05 Maintaining the longlist is part of a functioning supplier base and supports category management and supplier risk management.

06 In the context of the CSDDD and conflict minerals, the longlist is gaining importance as a starting point for sustainability and compliance checks.

## Definition: supplier longlist

The supplier longlist is the totality of all suppliers that are fundamentally eligible for a procurement project and meet initial, simple filter criteria. It is deliberately broad in scope and not yet evaluated in detail. Only the subsequent selection leads to the shortlist, which is then carried into the actual tender

or request.

### Distinction from the supplier shortlist

The longlist is a search and collection tool; the shortlist is a selection and negotiation tool. In practice, the buyer frequently reduces the longlist to three to eight candidates, who are then qualified in detail. The reduction follows documented criteria so that the process remains traceable and justifiable vis-à-vis internal stakeholders and audit requirements.

### Position within the procurement process

The longlist typically emerges after requirements and specification clarification and before the tender. It is closely linked to the procurement strategy: whether one sources globally, regionally or from a single source determines the direction and shape of the longlist. In global sourcing, the longlist is naturally broader than in regional single-source strategies.

## Structure and typical content of a longlist

A usable supplier longlist is more than an address list. It contains structured master data and initial qualifying attributes that allow rapid pre-selection without elaborate individual checks.

### Master data and qualification attributes

The depth varies by data source; in practice, the following details have proven effective:

- Master data: name, sites, legal form, order of magnitude of revenue, headcount
- Technology capability: processes, machine park, materials, standards and certifications (e.g. ISO 9001, IATF 16949)
- Logistics: region, typical Incoterms including Incoterms EXW or FAS, quality of transport links
- Initial assessment: financial situation, supplier risk, ESG indicators and conflict minerals exposure where applicable

### Sources for longlist creation

Buyers usually combine several sources: their own supplier master data from ERP and SRM systems, pre-qualification databases, industry associations, trade fair catalogues, recommendations from the network and process data from previous tenders. Data quality also determines success here: outdated capacity or certification information quickly creates a false picture of bottlenecks. A regular data quality report helps keep the longlist up to date.

### Category-level longlists

In addition to project-specific longlists, many procurement organisations maintain category-level longlists that serve as a category intelligence base. They document which suppliers can serve a category at all and are checked for currency with every new requirement. This saves time on follow-up projects and increases market coverage.

## Methods and approach for creating a longlist

Creation follows a simple pattern: define the search space, exhaust the sources, filter roughly, document. The balance between breadth and efficiency is crucial – an overcrowded longlist ties up resources, a too narrow one reduces competition.

### Five-step approach

A field-tested approach looks as follows:

- Define the requirement profile: technology, volumes, deadlines, quality requirements
- Determine the search space: regions, industries, size classes, supply strategy (single/multi-source)
- Collect candidates: internal data, databases, network, trade fairs
- Roughly filter by hard criteria (knock-out criteria) and soft facts
- Document and prioritise, then derive the shortlist

### Knock-out criteria and prioritisation

Knock-out criteria are hard exclusion criteria such as missing certification, insufficient technology compatibility, a critical financial situation or geographical risks. Everything else is scored, often with a simple scoring model. A duplicate score helps identify similar sites or group structures so that multiple equivalent suppliers are not unnecessarily duplicated.

### Involving specialist departments

Technical pre-assessment rarely succeeds without proximity to manufacturing or development. Design and production colleagues often know specialists who are not visible in databases – for example for tooling procurement or special coatings. A brief review loop with the specialist department significantly increases the hit rate of the longlist.

## Key KPIs for longlist work

The longlist phase can also be measured. Meaningful KPIs relate to market coverage, cycle speed and selection quality. They can easily be integrated into procurement controlling, for example via regular reports on the pipeline of new suppliers.

### KPIs at a glance

Typical guideline values in practice are summarised in the table below. They should be calibrated per category and according to the maturity of the organisation.

### Deriving follow-up metrics

After the shortlist phase, follow-up metrics are of interest: the proportion of new suppliers actually awarded contracts, the rate of tenders with sufficient bids, and the subsequent delivery service level development of new sources. This makes it possible to verify retrospectively whether the longlist criteria

brought the right suppliers into the process.

## Risks and controls around the longlist

The longlist carries specific risks: sham alternatives, outdated data, compliance gaps and wasted resources. Targeted controls significantly reduce these dangers.

### Typical risks

Common failure patterns are: lists consisting only of known suppliers (sham competition), failure to update after reorganisations or site relocations, and candidates that fit technically but are economically unstable. Incomplete compliance data – for example on sanctions or documentation obligations under the Corporate Sustainability Due Diligence Directive (CSDDD) – can also become expensive late in the process.

### Controls and documentation

Helpful controls include documented knock-out criteria in the procurement manual, a four-eyes principle for shortlist approval and a shelf-life-style refresh of the lists, in practice usually every six to twelve months. For international candidates, it is worth examining geopolitical risk factors before they make it onto the shortlist. The later document checks during onboarding close the gaps left open by the longlist review.

### Legal and ethical aspects

Legally, the longlist is neutral – obligations arise only with the quotation and the award. Nevertheless, indicators for compliance topics should be examined early on, such as human rights, climate data or capacity to give contractual commitments. A supplier ESG improvement plan initiated later is easier to implement if candidates have already been pre-sorted on an ESG basis. Tax and contractual law questions must be examined on a case-by-case basis.

## Current developments and digitalisation

Longlist work is increasingly moving into digital tools. AI-supported market searches, structured supplier databases and automated risk scans significantly shorten the path from requirement to qualified list – without replacing buyer responsibility.

### AI and the data basis

Modern approaches combine internal process data with external market information and deliver suggestions which the buyer evaluates professionally. Data maintenance remains crucial: without clean master data and a reliable duplicate score, tools generate more noise than benefit. Transparency about data provenance and evaluation logic is essential.

### Sustainability and compliance as filters

Sustainability criteria are moving from the shortlist into the longlist. Initial ESG indicators, sanctions list checks and indications of risk-laden raw materials (conflict minerals) are increasingly taken into account already when compiling the list. This reduces later drop-outs and accelerates onboarding.

### Interlocking with operational processes

For series and supplier relationships, the longlist is not enough: transport capacities, dock appointment arrangements, direct supply and fine planning of procurement capacities must be considered during pre-selection. Questions such as handling and customs clearance including CMR consignment notes and Incoterms agreements, as well as financial aspects such as early payment programmes or payment term assessments, can also be roughly estimated at longlist stage.

## Typical metrics

| Metric | Typical value |
|---|---|
| **Number of longlist candidates** | 15–50<br>*Usual guideline value per requirement; often higher in global sourcing* |
| **Shortlist rate** | approx. 20–40%<br>*Proportion of longlist candidates that make it onto the shortlist* |
| **Quote rate from shortlist** | > 70%<br>*Proportion of shortlisted suppliers that actually submit a quotation* |
| **Data currency** | <= 12 months<br>*Time since last verification of master data and certifications* |
| **New supplier share** | typically 10–20%<br>*Proportion of new sources among awarded contracts per category* |

## Practical example

A mid-sized mechanical engineering company needed machining capacity for high-strength steel components for a new product series. Procurement first compiled a supplier longlist with 32 candidates from its own ERP data, a pre-qualification database and trade fair contacts. After knock-out filtering (ISO certification, machine park, region), twelve candidates remained, who were invited to tender. In the end, two new suppliers were onboarded who meaningfully complemented the existing supplier base.

- Knock-out criteria documented in the procurement manual and aligned with engineering
- Duplicate score used to avoid counting group sites twice
- Geopolitical risk assessed and weighed for two Eastern European candidates

- Longlist stored in a category intelligence dataset and updated every six months

## Conclusion

The supplier longlist is the foundation of every structured supplier search. It secures market coverage, creates negotiating leverage and makes the selection process auditable. The balance between breadth and efficiency is crucial: too many candidates tie up resources, too few prevent genuine competition. Anyone who systematically maintains the longlist, keeps it supplied with current data and embeds it in the procurement strategy sustainably reduces procurement risks and accelerates all downstream steps up to contract award.

## Frequently asked questions

**? What is a supplier longlist?**

A supplier longlist is the complete, pre-filtered list of all potentially suitable suppliers for a procurement project or category. It is created through market screening from various sources and forms the basis for the later shortlist. It has not yet been evaluated in detail, but only roughly qualified.

**? How many suppliers are typically on a longlist?**

In practice, a longlist often comprises 15 to 50 candidates, and more for broad or global categories. What matters is less the absolute number than the coverage of relevant technologies and regions. Usually three to eight candidates are selected from the longlist for the shortlist.

**? Which criteria determine inclusion on the longlist?**

Typical criteria are technology and process capability, capacity, region, certifications, financial situation, and compliance and ESG indicators. Hard knock-out criteria filter out unsuitable candidates, while soft criteria serve for prioritisation. The criteria should be documented, for example in the procurement manual.

**? How do you get from the longlist to the shortlist?**

Through structured pre-selection with documented criteria and, where applicable, a scoring model. First, knock-out criteria are applied; the remaining candidates are then scored and prioritised. The shortlist typically comprises three to eight suppliers, who are then invited to submit a tender.

**? How often should a supplier longlist be updated?**

In practice, updating every six to twelve months has proven effective, and more frequently for critical categories. Outdated capacity, certification or financial information leads to poor decisions. A data quality report supports systematic maintenance.

**? What role does the longlist play in sustainability requirements?**

It is the earliest sensible starting point for sustainability and compliance filters. Initial ESG

indicators, sanctions list checks and indications of conflict minerals can already be examined at longlist stage. This reduces the effort required for later due diligence steps, for example in the context of the CSDDD.


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