

## Specification of Competency Standards for the Logistics Industry

### Unit of Competency

1. Title	Formulate tendering strategy
2. Code	LOCUOM507A
3. Range	This unit of competency is applicable to sea freight, air freight and express operators. Practitioners should be capable to formulate the tendering strategy according to the needs of the company and the project, and the actual situation of the market for service providers.
4. Level	5
5. Credit	6 ( for reference only )
6. Competency	<p style="text-align: center;"><u>Performance Requirements</u></p> <p>6.1 Knowledge of tendering for logistics and transport services</p> <ul style="list-style-type: none"><li>◆ Understand the concepts of tendering and contracting, and their advantages and disadvantages</li><li>◆ Understand the processes, working procedures and the resources required in daily logistics operation of the company/unit</li><li>◆ Understand the special technological requirements in different processes, such as specified trade standards, professional qualifications and licensing, etc.</li><li>◆ Understand the actual situation of the market for service providers</li><li>◆ Understand the tendering procedures and requirements</li><li>◆ Understand the methods and techniques for designing and compiling tendering documents</li><li>◆ Master the ways of tendering, such as invited tender or open tender</li><li>◆ Understand the legislations relevant to tendering</li></ul>

6.2 Formulate tendering strategy

- ◆ Understand clearly the requirements of individual projects and the company's need for tendering in specified areas of a project
- ◆ Assess the scale of the project which requires tendering
- ◆ Assess the number of successful tenderers, and their allocation and scope of work
- ◆ Identify the areas and items of the project which requires tendering, according to the requirements of a company/unit, the special technological requirements in individual projects and other special requirements.
- ◆ Formulate selection criteria for tendering and list detailed tender specifications
- ◆ Formulate selection criteria for assessing tenderers, such as charges, past records, overall performance, past cooperation between the tenderer and the company
- ◆ Design the working procedures and mechanism for tender assessment
- ◆ Design communication and reporting mechanisms for tendering
- ◆ Formulate a detailed tendering strategy and compile tender for the project in question
- ◆ Establish a good tendering system to assess different areas of the tender, according to the overall policies of a company, so as to select the most appropriate service provider
- ◆ Compile reports to illustrate the formulation of the tendering strategy

7. Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>(i) Capable to establish a tendering and assessment mechanism which can determine the comprehensive performance and capability of tenderers according to the needs of a company and a project, especially the specified technological requirements;</li> <li>(ii) Capable to select appropriate service providers to complete a project according to a tendering and assessment mechanism; and</li> <li>(iii) Capable to compile reports to illustrate the formulation of the tendering strategy.</li> </ul>
8. Remarks	