

# Industrial RFQ Template

Request for Quotation — capital equipment and EPC packages

Free to use and share. Full guidance: [globalb2bgroup.com/rfq-guide/rfq-template](https://globalb2bgroup.com/rfq-guide/rfq-template)

## 01 Header and issuing details

|                                                          |  |
|----------------------------------------------------------|--|
| RFQ reference number and revision                        |  |
| Issuing company, site address and country                |  |
| Buyer contact name, email and phone                      |  |
| Issue date / clarification deadline / quotation deadline |  |
| Quotation validity period required                       |  |

## 02 Project background

|                                                          |  |
|----------------------------------------------------------|--|
| What the facility produces and current capacity          |  |
| Reason for the investment                                |  |
| Required operational start date                          |  |
| Greenfield, brownfield or integration into existing line |  |

## 03 Technical scope and capacity

|                                                    |  |
|----------------------------------------------------|--|
| Throughput and unit of measure                     |  |
| Product characteristics, temperature, handling     |  |
| Operating hours/day, days/year, shift pattern      |  |
| Automation and control level, data/MES integration |  |
| Redundancy, cleaning regime, changeover            |  |

## 04 Standards, certification and compliance

|                                                          |  |
|----------------------------------------------------------|--|
| CE / UL / ATEX / IECEx as applicable                     |  |
| Hygienic design and food-contact materials               |  |
| Local approvals, electrical code, documentation language |  |
| Test certificates and factory acceptance test scope      |  |

## 05 Site conditions and utilities

|                                                         |  |
|---------------------------------------------------------|--|
| Power: voltage, phases, frequency, connected load limit |  |
| Water, steam, compressed air, chilled water, drainage   |  |
| Footprint, ceiling height, floor loading, access route  |  |
| Ambient temperature, humidity, altitude, wash-down      |  |

## 06 Scope of supply split (included / excluded / by others)

|                                                                |  |
|----------------------------------------------------------------|--|
| Equipment, control panels, software licences                   |  |
| Civils, foundations, structural steel                          |  |
| Electrical connection, cabling, line integration               |  |
| Removal and disposal of existing assets                        |  |
| Supervision vs full installation; commissioning responsibility |  |

## 07 Delivery, installation and acceptance

|                                                    |  |
|----------------------------------------------------|--|
| Incoterms, port of entry, packing, insurance       |  |
| Required delivery window and installation duration |  |
| Commissioning and training days                    |  |
| Performance acceptance criteria and sign-off       |  |

## 08 After-sales, spares and warranty

|                                                    |  |
|----------------------------------------------------|--|
| Warranty duration and coverage                     |  |
| Commissioning and two-year spares list with prices |  |
| Response time commitment and remote support        |  |
| Local service partner availability                 |  |

## 09 Commercial terms

|                                                           |  |
|-----------------------------------------------------------|--|
| Currency and price basis                                  |  |
| Payment milestones, retention, bank guarantees            |  |
| Liquidated damages for late delivery / missed performance |  |
| Price validity and escalation conditions                  |  |

## 10 Response format and evaluation criteria

|                                                                 |  |
|-----------------------------------------------------------------|--|
| Required price breakdown lines                                  |  |
| Mandatory documents: layout drawing, utilities list, references |  |
| Evaluation weighting: price, lead time, capability, service     |  |
| Submission address, file format, single point of contact        |  |

## **Rules that keep bids comparable**

- Send the identical package and deadline to every invited supplier.
- Run one clarification round and copy every answer to all bidders.
- Freeze the specification before pricing is requested.
- Never accept a lump sum with no breakdown.
- Ask for lead time in weeks from order confirmation, not a date.
- Invite three to five qualified suppliers.

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