

# Public Service Spend and Tendering Analysis Report 2019



Oifig um Sholáthar Rialtais  
Office of Government Procurement



An Roinn Caiteachais  
Phoiblí agus Athchóirithe  
Department of Public  
Expenditure and Reform



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# Foreword

Foreword by the Minister for Public Expenditure and Reform, Mr Michael McGrath T.D., and the Minister of State at the Department of Public Expenditure and Reform with special responsibility for Public Procurement, Mr Ossian Smyth T.D.

We are pleased to welcome the Office of Government Procurement's (OGP) 'Public Service Spend and Tendering Analysis Report 2019.' This is the seventh OGP report analysing procurement expenditure and tendering activity across the public service. Reports have now been done for each year from 2013 to 2019. The value of analysed addressable public procurement spend data has increased from approximately €3.9 billion in 2013 to €4.9 billion in 2019. This latest report contains the largest amount of spend data analysed over the seven reports and represents a €1 billion increase on the 2013 data.

Under the Government's centralised procurement model, an estimated €6 billion of procurement addressable spend falls within the remit of the Central Purchasing Bodies (CPBs) - the OGP, Health, Education, Local Government and Defence. This report analyses €4.9 billion or 83% of that €6 billion estimated procurement addressable spend. It finds that 92% of the analysed expenditure is with firms within the State.

As in previous reports, the majority of the expenditure analysed is with SMEs (Small and Medium Enterprises). 52% of analysed spend for 2019 was with SMEs. SMEs continue to have the greater share of spend in 11 of the 16 procurement spend categories with large companies dominating in categories such as Utilities and Defence.

This report also analyses 2019 tendering activity in the public service as recorded on eTenders, the Government's national electronic tendering platform. 5,000 tender notices are analysed with an estimated contract value of €7.5 billion. 75% of tender notices are smaller value (below Official Journal of the European Union (OJEU) threshold tenders. The median (typical) estimated contract values for tenders analysed in 2019 is €110,000 and is less than or equal to €110,000 in 13 of the 16 spend categories. This would indicate that Government contracts in Ireland are accessible to SMEs given the low median size of estimated contract values for published tenders.

Public procurement represents a major opportunity for SMEs. The OGP works with Government agencies and industry representative bodies on policy initiatives to support access to this market. It also promotes education and awareness about public procurement opportunities both in Ireland and across the EU market.

In line with the Programme for Government (PfG), the SME Working Group promotes the engagement of SMEs in public procurement. The group includes industry representatives, including the Irish Business and Employers Confederation (IBEC), Irish Small and Medium Enterprises (ISME), the Construction Industry Federation (CIF), the Small Firms Association (SFA) and Chambers Ireland as well as key public sector officials. The group is chaired by the Minister of State at the Department of Public Expenditure and Reform with special responsibility for Public Procurement.

This report will enable businesses to appreciate just how good an opportunity public procurement can be for SMEs.

While the OGP prepared the 2019 spend analysis in this report, it would not have been possible without the data provided by public service bodies. We wish to acknowledge those organisations for this information which contributes to increased openness and transparency in public expenditure. This data supports the development of procurement strategies to deliver sustainable value for money for the State.



**Mr. Michael McGrath, T.D.**  
Minister for Public Expenditure  
and Reform



**Mr. Ossian Smyth, T.D.**  
Minister of State for Public Procurement  
and eGovernment

# About the OGP

The Office of Government Procurement (OGP) shapes the future of public procurement by:

- Putting in place procurement solutions to meet public service needs
- Delivering value for money for the State
- Providing policy advice, guidance, and training
- Providing procurement systems such as eTenders
- Analysing procurement data
- Focusing on green and social procurement

The OGP operates as an office of the Department of Public Expenditure and Reform (DPER) and its CEO, Paul Quinn is the Chief Procurement Officer (CPO) for the State.

The OGP leads on procurement reform and builds procurement capacity and capability together with its sector sourcing partners in Health, Education, Local Government and Defence. Collectively, these Central Purchasing Bodies (CPBs) operate a centralised procurement model for goods, services and minor works.

The OGP supports procurement and contracting strategies for projects across Government. In 2019, the OGP sourcing teams completed a total of 1,004 competitions with an estimated contract value of €4,516m. It established a total of 23 additional frameworks, 17 discrete contracts and more than 900 mini-competitions to assist public service bodies in securing goods and services. The OGP now has in excess of 100 active framework agreements.

The State's annual procurement expenditure with suppliers, excluding major capital projects, is of the order of €9 billion. The procurement addressable spend under the remit of the OGP and its sector partners is of the order of €6 billion.<sup>1</sup> The expenditure addressable by procurement relates to goods and services sourced through State purchasing processes by public service bodies. It excludes the General Medical Services Scheme (GMS), grants to Community and Voluntary bodies, interagency payments and rent on property. Minor Building Works and Civils are covered while major capital projects are not. The OGP is, however, responsible for national procurement policy relating to public works. Commercial Semi-State bodies are also outside the remit of the centralised procurement model but are subject to national public procurement policies. (See Appendix 1 for a definition of the public service organisations in scope.)

Since 2013 the OGP has been gathering source data on procurement expenditure from PSBs and creating a central data repository to support its sourcing and policy activities. The OGP has, as part of its remit, published six Public Service Spend and Tendering Analysis Reports for 2013 - 2018. This seventh report, Public Service Spend and Tendering Analysis Report for 2019, analyses spend and tendering activity data for 2019 providing comparisons to 2017 and 2018.

<sup>1</sup> The figures for the State's annual procurement addressable spend are based on estimates established in a detailed review of procurement data carried out in 2014.



# Executive Summary

This *Public Service Spend and Tendering Analysis for 2019* is the Office of Government Procurement's seventh report analysing annual expenditure and tendering activity across public service bodies (PSBs) in Ireland. This report provides data and insights into the scale, and impact of public procurement in Ireland on specific areas of government policy such as enabling greater transparency and supporting SMEs.

Spend analysis in this report is based on expenditure data that has been gathered from 61 PSBs. It excludes the General Medical Services Scheme (GMS), grants to Community and Voluntary bodies, interagency payments and rent on property. The procurement addressable spend, excluding major capital projects, under the remit of the OGP and its CPB counterparts in the Health, Education, Local Government and Defence sectors was estimated at €6 billion annually by a study conducted in 2014. 83% of this estimated procurement addressable spend amounting to €4.955 billion is analysed in this latest report.

The analysis of tendering activity is based on data from eTenders, the Government's national electronic tendering platform that is administered by OGP, excluding semi-state, grant funded (mainly voluntary and community groups) and non-sector (non-national contracting authorities and private companies who receive funding from State or EU) organisations as these bodies are not under the centralised procurement remit of the OGP.

There are two main areas of analysis covered in this report:

1. Section 2 covers the analysed 2019 spend data. Corresponding analysed spend data values for 2017 and 2018 are included in this section for reference.
2. Section 3 covers analysed 2019 tendering data. Corresponding analysed tendering data values for 2017 and 2018 are included in this section for reference.

## 2019 Spend Analysis

The key points to note in the 2019 analysis are:

1. SMEs continue to have the greater share of spend in 11 of the 16 procurement spend categories.
2. Overall, 52% of analysed spend for 2019 was with SMEs a percentage point decrease on the 2018 value.
3. Total value of 2019 spend analysed is €4.955 billion<sup>2</sup>, €124m higher than the 2018 analysed spend figure of €4.831 billion. The collection of data continued to be impacted for this report. Spend analysis in this report is based on expenditure data that has been gathered from 61 PSBs, down 8 from 2018.
4. 92% of the 2019 analysed spend is within the State, this is the same as the 2018 report total.
5. Medical, Surgical and Pharmaceutical Supplies remains the largest procurement category with 18% share of analysed spend for 2019.

## 2019 Tendering Analysis

The 2019 Tendering Analysis looks at tender and contract award notices published on eTenders by PSBs. It should be noted that, in contrast to the spend data, values in the tendering analysis are exclusive of VAT.

The key points to note in the 2019 tendering analysis are:

1. At 5,004, the number of published tender notices analysed is higher (13.4%) than the 4,413 analysed in 2018.
2. The estimated contract value of 2019 analysed published tender notices is 40% lower at €7.560 billion (down from €12.599 billion in 2018). The decrease is primarily attributable to the Utilities, Construction and Civils spend categories where there is a combined decrease in estimated contract value in excess of €5 billion compared to 2018.
3. The average estimated value of 2019 published tender notices analysed is €1.51 million as against €2.85 million in 2018. The median (typical) estimated contract values for tenders analysed in 2019 is €110,000 10% higher than the 2018 median value of €100,000.

<sup>2</sup> Due to rounding, numbers presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures.

4. 74.6% (3734) of all analysed published tender notices are below the Official Journal of the European Union (OJEU) tender thresholds, accounting for an estimated value of €934 million. This represents 12.4% of all 2019 analysed published tender notices estimated values. (See Appendix 2 for details of OJEU thresholds).
5. The Construction and Civils Works category accounts for the largest share (€3,510 billion) of the total estimated contract value of analysed published tender notices with an average contract value of €2.26 million and a median (typical) value of €140,000.
6. The average estimated contract value of all 2019 analysed published tender notices by procurement spend category ranges from €2.26 million (Construction and Civils) to €150,000 (Plant Hire) while the median values range from €150,000 (Medical, Surgical and Pharmaceutical Supplies) to €60,000 (Medical and Diagnostic Equipment and Supplies).
7. The median estimated contract value of all 2019 analysed published tender notices is less than or equal to €100,000 in 13 of the 16 spend categories.
8. The number of 'in-year' contract award notices published (i.e. award notices published in 2019 for notices published in 2019) is 11% higher at 1,214, up from 1,090 'in-year' awards in 2018.
9. Total in-year award notices as a percentage of all 2019 analysed published tender notices is one percentage point lower in 2019 at 24%.

This 2019 report contains a total 2018 awards figure as it includes award notices published since the end of 2018 in respect of tender notices published in 2018. The total number of 2018 contract award notices (2,147) is over double the 2018 in-year total of 1,090 and the corresponding estimated contract award values have increased by over six times over the reported 2018 in-year total of €991 million to €6.2 billion.

## Conclusion

This is the seventh OGP report analysing procurement expenditure and tendering activity across the public service. The value of addressable PSB spend data collected and analysed has increased from €3.910 billion in 2013 to €4.955 billion in 2019. The 2013 report analysed tendering data of €4.361 billion; this report analyses €7.560 billion of public service tendering data.

83% of the estimated annual procurement addressable spend of €6 billion within the remit of the OGP and the Central Purchasing Bodies (CPBs) for Health, Education, Local Government and Defence is analysed in this report.

The majority of 2019 spend analysed (52%) was with SMEs and 92% was with businesses in the state. The 2019 supplier profile for 11 of the 16 procurement spend categories is predominantly SME (i.e. greater than or equal to the overall 52% SME share of analysed spend).

The analysis of 2019 public service tendering activity on the national tendering platform eTenders looks at 5,004 tender notices with an estimated contract value of €7.560 billion. The volume and estimated value of these tender and contract award notices are profiled by procurement category. In-year award notices account for 24% of the tender notices published for 2019.

This report contains a total 2018 tender contract awards figure as it includes award notices published since the end of 2018 in respect of tender notices published in 2018. It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process. The volume of total contract award notices (2,147) is almost double the 'in-year' awards of 1,090 award notices. The 2018 total estimated award value of €6.2 billion is over six times the 2018 in-year total estimated award value of €991 million.

1

# Introduction



## 1.1 About the Report Data

The *Public Service Spend and Tendering Analysis Report for 2019* contains two types of analysis. The first is focused on addressable public service procurement spend (spend analysis) and the second on tendering activity in the public service (tendering analysis).

The 2019 spend analysis is based on expenditure data gathered by the OGP from 61 PSBs. These bodies are from across the five public sectors of Central Government, Education, Health, Justice and Local Government. For a full list of these bodies please see Appendix 3.

Spend data from the Department of Justice and Equality for the department and bodies under its aegis is analysed as the Justice sector. 2019 data for the Justice sector was not available due to ongoing revisions to arrangements in place between the OGP and the Justice sector.

The Education sector data is from third-level institutions and does not include spend data from primary and secondary level schools. Collecting spend data from across c. 4,000 primary and secondary schools would be a complex and labour-intensive exercise as it would be to gather data from over 2,750 voluntary agencies in the Health sector. The 2019 report includes spend data from 31 local authorities.

The spend analysis in this report is based on financial transaction data received from PSBs. No adjustments or extrapolations have been made for possible over or underrepresentation of sectors based on the number of organisations that provided data.

The 2019 tendering analysis is based on tender and award notice data from eTenders, the Government's national electronic tendering platform. The analysis is dependent on contracting authorities conducting procurement competitions on eTenders and the accuracy and extent of the tender and award notice data input by the relevant public service contracting authorities to eTenders.

Sections 1.2 and 1.3 below contain more information on spend and tendering data and provide a useful reference point for the analysis contained in sections 2 and 3 of the report.

## 1.2 Spend Data

The spend data analysed is based on payments transaction data provided by PSBs from a range of financial systems. It is important to note that all spend data values are inclusive of VAT.

As the OGP's requirement is to analyse spend that is procurement addressable the following data is excluded from the expenditure transactions gathered from the PSBs to arrive at the dataset for analysis:

- 1) **Un-addressable** – Spend that cannot be directly addressed by procurement is removed from the scope of analysis. This is spend such as grants or expenses that does not arise from state purchasing processes.
- 2) **Interagency** – Payments by one public service body to another is not addressable and is removed from the spend data for analysis.
- 3) **Unclassified Suppliers** – Spend transactions not yet associated with a classified supplier (i.e. supplier with known address and size classification) are also excluded.

Table 1.1 below shows the 2019 spend data gathered and the net spend data set for analysis. Following the exclusion of un-addressable, interagency and unclassified spend data, the 2019 spend data set analysed in this report has a total value of €4.955 billion (including VAT).

2019 Spend Data	2017	2018	2019
	(€m)	(€m)	(€m)
<b>Total spend data collected</b>	<b>7,329</b>	<b>7,256</b>	<b>7,800</b>
Exclusions:			
Un-addressable spend	914	1,169	1,457
Interagency spend	701	608	610
Spend with unclassified suppliers	802	649	777
<b>Net Spend Data for Analysis</b>	<b>4,912</b>	<b>4,831</b>	<b>4,955</b>

Table 1.1: Spend Data Collected and Exclusions Applied 2017 - 2019

In line with other leading procurement functions, the OGP follows a 'Category Management' approach to procurement, using an agreed standard taxonomy for categorisation of goods and services across all public bodies. There are 16 main categories, grouping procurement activities with comparable characteristics such as similarities in supply market profile, product type and end use. The expenditure categories have not changed since the publication of the first report for 2013 (category details are at Appendix 4).

In addition to the 16 spend categories two additional categorisations are included in the analysis – 'Capital' and 'Uncategorised'. Capital refers to expenditure on major works and is currently out of scope for the centralised procurement model. While this data was not requested from public service bodies, where provided, it has been included for completeness. Spend data under the heading 'Uncategorised' relates to expenditure that could not be allocated to one of the 16 categories. Uncategorised spend is 1% of total analysed spend. As 99% of analysed spend traceable is to a category this indicates that the categorisation taxonomy is logical. The spend data analysed for this report has been mapped to a category but cannot at this time be codified at a product level as public finance systems typically capture payments to suppliers but not the breakdown of line level information of the goods or services involved.

The analysed spend dataset includes profiles by supplier location (Ireland or International) and supplier size - SME (Small and Medium sized Enterprises) or large. Supplier location is based on the methodology outlined in Appendix 5. The identification of spend with SMEs is of particular interest. The SME definition used to classify suppliers is European Union recommendation 2003/361 i.e. enterprises where the number of employees is less than 250 and, where data is available, they have either turnover of less than or equal to €50 million or a balance sheet with net assets of less than or equal to €43 million. While some data from eTenders is used for supplier classification the OGP is dependent on external data sources to classify suppliers. (See Appendix 5.)

An overview of the spend data analysis methodology is at Appendix 6.



## 1.3 Tendering Data

eTenders ([www.etenders.gov.ie](http://www.etenders.gov.ie)) is the Irish Government's electronic tendering platform administered by the OGP. The platform is a central facility for all public sector (i.e. public service bodies and commercial semi-state bodies – see Appendix 1) contracting authorities to advertise procurement opportunities and award notices. All tender and contract award notices are classified as either OJEU (above the thresholds that require publication in the Official Journal of the European Union) or as Non-OJEU (below those thresholds and subject to national procurement rules).

eTenders displays, on a daily basis, all Irish public sector procurement opportunities currently advertised in the OJEU as well as below OJEU threshold tenders. Details of OJEU and national thresholds are at Appendix 2.

The EU Common Procurement Vocabulary (CPV) code associated with each tender notice is used to map tenders and award notices to the 16 procurement categories. Where multiple CPV codes are entered for a tender notice the most prevalent CPV category indicator is used.

It should be noted that the values in the tendering analysis include published values and the estimated values entered by the contracting authority when creating the tender. All monetary values in the tendering analysis are exclusive of VAT. It should also be noted that as the 2018 tender and award notice data is entered on eTenders by various public service contracting authorities, data quality and accuracy is dependent upon that entered by those organisations.

An overview of the tendering data analysis methodology is at Appendix 6.

### 1.3.1 Tender Notices Analysed

The eTenders data analysed in this report excludes activities by Non-Public Service Bodies such as Commercial Semi-State bodies, grant funded (mainly voluntary and community groups) and non-sector (non-national contracting authorities and private companies who receive funding from State or EU) organisations as these bodies are not under the centralised procurement remit of the OGP or the sector CPBs.

As Table 1.2 shows, a total of 6,612 tender notices were published in 2019 by all public sector contracting authorities. As this report considers only the tendering activities of public service bodies, 1,605 tenders published by Non-Public Service Bodies have been excluded. PSB tender notices that have no CPV (EU Common Procurement Vocabulary) codes are also excluded as it is not possible to analyse those tender notices by procurement spend category. There were none of these tenders for 2018 and 3 for 2019. The volume of tender notices analysed for 2019 is 5,004, 13% higher than the 2018 figure. The estimated contract value of tender notices analysed in 2019 is 40% lower than 2018 at €7.560 billion. Section 3 of the report analyses these tender notices as Non-OJEU, OJEU and by procurement spend category.

Tender Notices	2017		2018		2019	
	Volume	Value (€m)	Volume	Value (€m)	Volume	Value (€m)
Number of Tender Notices Published	5,816	11,439	5945	33796	6,612	24,027
Non-Public Service Body Tenders Notices (excluded)	1,361	5,277	1532	21197	1,605	16,466
PSB Tender Notices with no stated CPV Code (excluded)	67	4	0	0	3	0
<b>Total Analysed</b>	<b>4,388</b>	<b>6,157</b>	<b>4,413</b>	<b>12,599</b>	<b>5,004</b>	<b>7,561</b>

Table 1.2: Tender Notices Analysed 2017 - 2019

## 1.4 Report Overview

This report covers two main areas of analysis:

Section 2 covers the analysed spend data for 2019. Corresponding analysed spend data values for 2017 and 2018 are included in this section for reference.

Section 3 covers analysed 2019 tendering data. Corresponding analysed tendering data values for 2017 and 2018 are included in this section for reference.

# 2

## Public Service Spend Analysis for 2019



## 2.1 Spend Data Analysed

The *Public Service Spend and Tendering Analysis for 2019* report analyses spend data to the value of €4.955 billion<sup>3</sup> collected from 61 public service bodies (a list of these PSBs is at Appendix 3). The 2019 total spend analysed is up by €124m (2.6%) on the 2018 analysed spend figure of €4.831 billion. This increase is despite the collection of data for this report being negatively impacted by issues including among them resource constraints in some public service bodies as a result of the COVID-19 crisis. In addition to this, 2019 data for the Justice sector was not available for inclusion in this report due to ongoing revisions to their arrangements with the OGP.

Table 2.1 and Figure 2.1 give a breakdown of the 2019 €4.955 billion spend analysed across the five sectors; Central Government, Education, Health, Justice and Local Government and compares it to that of 2017 and 2018.

Sector	2017		2018		2019	
	Spend (€m)	% of Total	Spend (€m)	% of Total	Spend (€m)	% of Total
Health	2,601	53%	2,397	50%	2,602	53%
Local Government	1231	25%	1,213	25%	1,430	29%
Central Government	461	9%	463	10%	513	10%
Education	313	6%	416	9%	410	8%
Justice	306	6%	342	7%	0	0%
<b>Total Analysed Spend</b>	<b>4,912</b>	<b>100%</b>	<b>4,831</b>	<b>100%</b>	<b>4,955</b>	<b>100%</b>

Table 2.1: Total Analysed Spend by Sector 2017 - 2019

€2.602 billion of analysed spend relates to the Health sector. At 53% this is the largest share of the analysed spend and is 9% higher than the corresponding 2018 figure.

Local Government sector analysed spend is €1.430 billion, €217 million higher than the 2018 figure and 29% of the analysed total.

€513 million of analysed spend relates to Central Government. This is 10% of the analysed total and 11% higher than the 2018 Sector total.

The Education sector analysed spend accounts for 8% of the total at €410 million. This is 1.5% lower compared to their 2018 Sector totals.

<sup>3</sup> Due to rounding, numbers presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures.

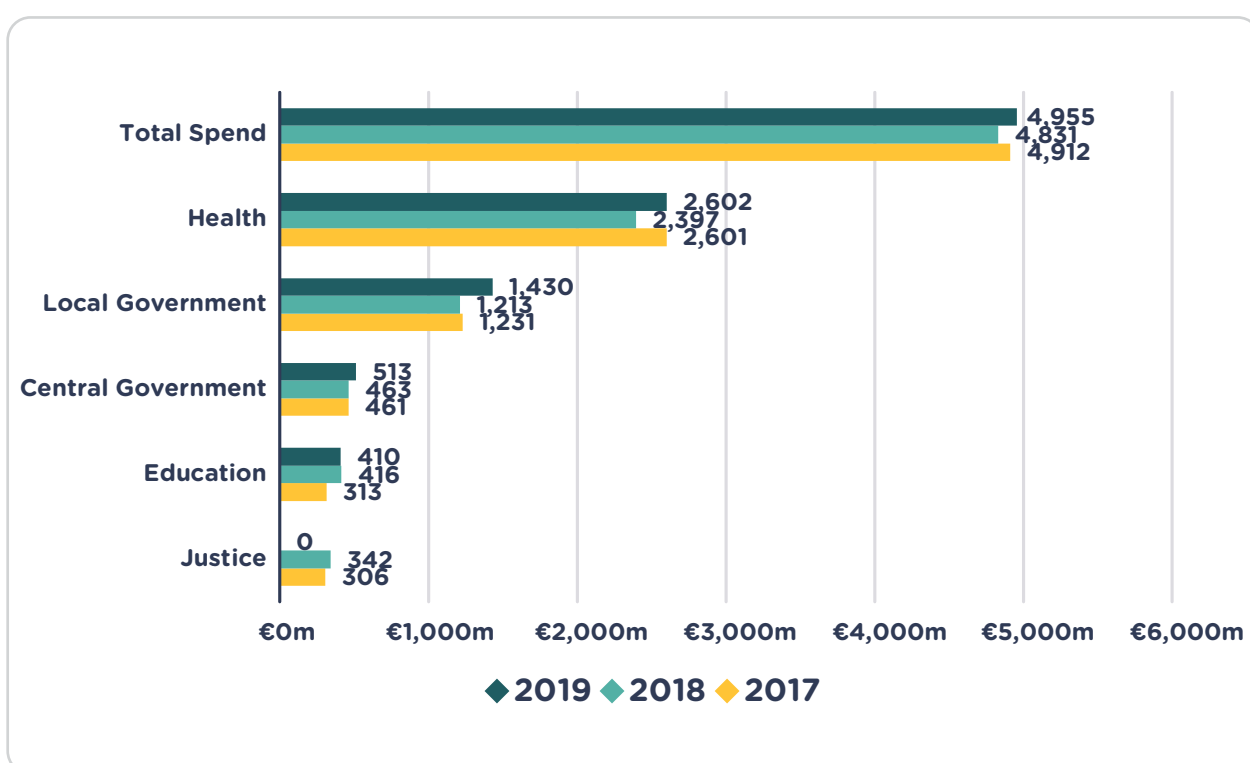


Figure 2.1: Total Analysed Spend by Sector 2017 - 2019

## 2.2 Spend Analysis by Category

As stated in Section 1.2, the OGP follows a 'Category Management' approach to procurement, using an agreed standard taxonomy for categorisation of goods and services across all public bodies. These categories are listed in the expenditure tables below with category details included at Appendix 4.

Table 2.2 and Figure 2.2 show expenditure by category for 2017 - 2019. Both the table and the graph are sorted in descending order based on 2019 analysed spend per category.

- Medical, Surgical and Pharmaceutical Supplies is the largest category in the 2019 analysed spend at €869m. This is 18% of analysed spend and 5% higher than the 2018 value.
- The second largest category is Professional Services at €738m, representing 15% of the analysed spend while 13% higher than the 2018 value
- Facilities Management, Maintenance is the third largest category at €633m analysed spend. This is 13% of analysed spend and 2% lower than in 2018.

These three categories continue to be the top three categories for each year's analysed spend dataset since 2013, with an aggregated share of the total analysed spend for each year of between 41% and 46%.

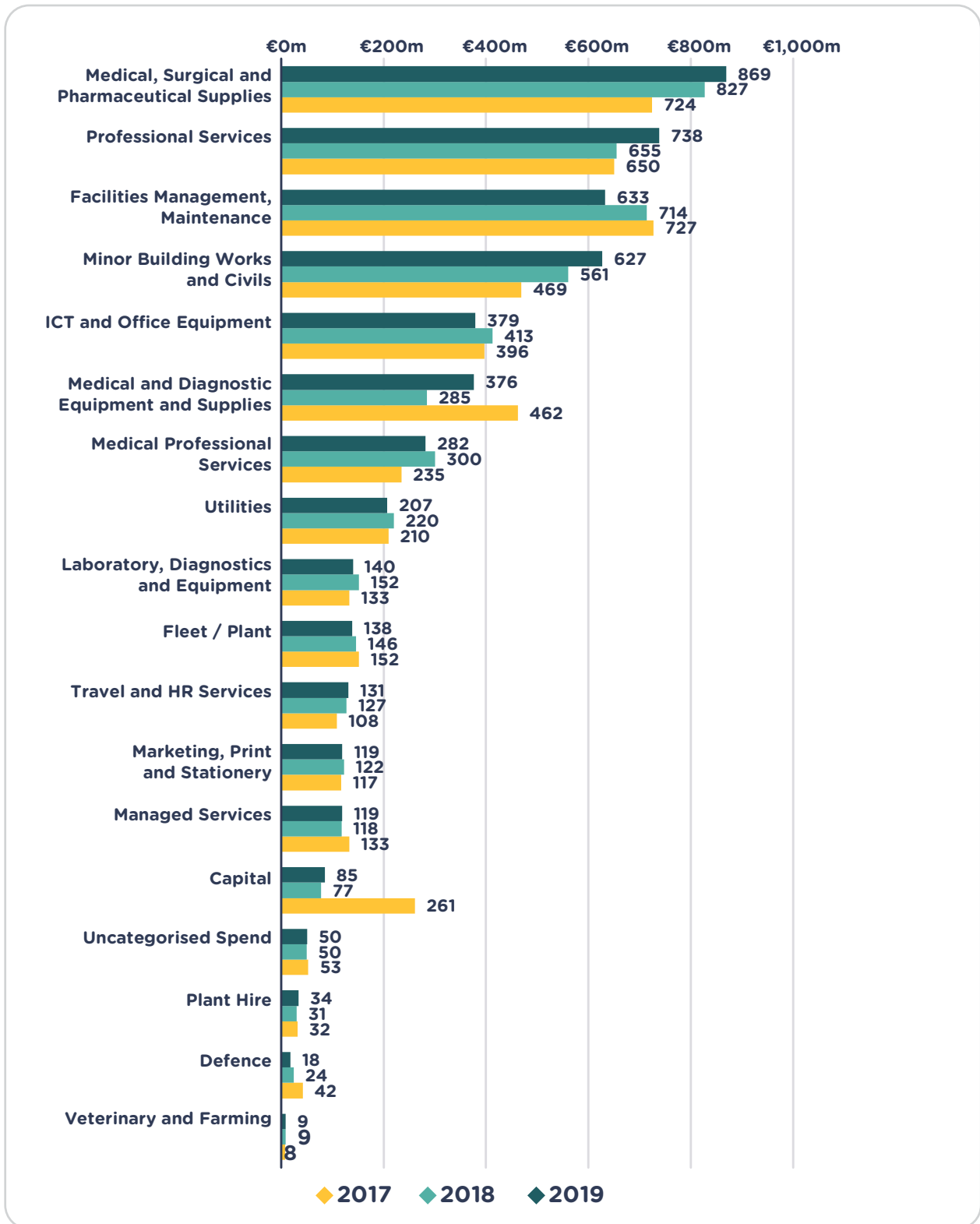


Figure 2.2: Total Analysed Spend by Category 2017 - 2019

Spend Category	2017		2018		2019	
	Spend (€m)	% of Total	Spend (€m)	% of Total	Spend (€m)	% of Total
Medical, Surgical and Pharmaceutical Supplies	724	14.7%	827	17%	869	18%
Professional Services	650	13%	655	14%	738	15%
Facilities Management, Maintenance	727	15%	714	15%	633	13%
Minor Building Works and Civils	469	10%	561	12%	627	13%
ICT and Office Equipment	396	8%	413	9%	379	8%
Medical and Diagnostic Equipment and Supplies	462	9%	285	6%	376	8%
Medical Professional Services	235	5%	300	6%	282	6%
Utilities	210	4%	220	5%	207	4%
Laboratory, Diagnostics and Equipment	133	3%	152	3%	140	3%
Fleet / Plant	152	3%	146	3%	138	3%
Travel and HR Services	108	2.2%	127	3%	131	3%
Marketing, Print and Stationery	117	2%	122	2.5%	119	2%
Managed Services	133	3%	118	2%	119	2%
Capital	261	5%	77	2%	85	2%
Uncategorised Spend	53	1%	50	1%	50	1%
Plant Hire	32	1%	31	1%	34	1%
Defence	42	1%	24	0.5%	18	0.4%
Veterinary and Farming	8	0.2%	9	0.2%	9	0.2%
<b>Total Analysed Spend</b>	<b>4,912</b>	<b>100%</b>	<b>4,831</b>	<b>100%</b>	<b>4,955</b>	<b>100%</b>

Table 2.2: Total Analysed Spend by Category 2017 - 2019

## 2.3 2019 Spend Analysis by Supplier Location

The profile of analysed spend between Irish and international suppliers is unchanged from 2018 with the share of 2019 analysed spend with Irish organisations at 92%. The value of analysed spend with suppliers within Ireland was €4.58 billion in 2019, €158 million higher than the 2018 analysed figure. Supplier location is based on the methodology outlined in Appendix 5. The supplier location of the analysed spend from 2017 - 2019 is shown in Table 2.3 and Figure 2.3 below.

Location	2017		2018		2019	
	Spend (€m)	% of Total	Spend (€m)	% of Total	Spend (€m)	% of Total
Ireland	4,616	94%	4,425	92%	4,583	92%
International	296	6%	405	8%	373	8%
<b>Total Analysed Spend</b>	<b>4,912</b>	<b>100%</b>	<b>4,831</b>	<b>100%</b>	<b>4,955</b>	<b>100%</b>

Table 2.3: Total Analysed Spend by Location 2017 - 2019

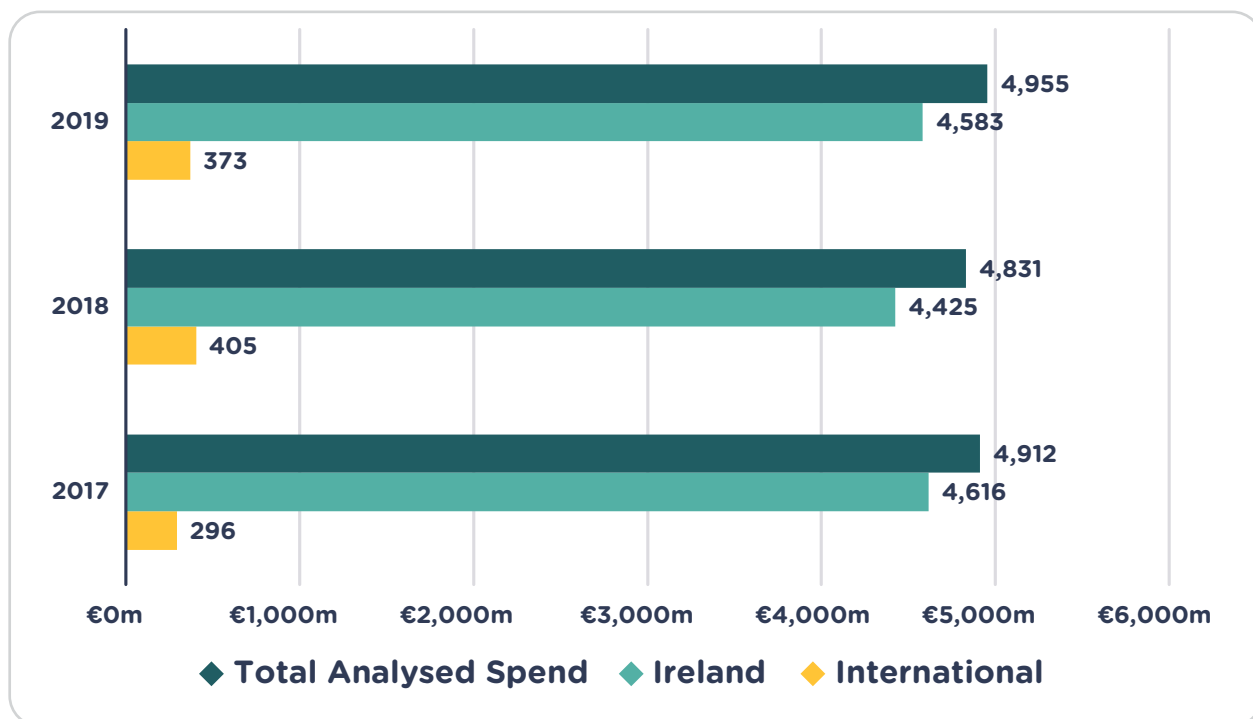


Figure 2.3: Total Analysed Spend by Location 2017 - 2019



## 2.4 Analysed Spend by Supplier Type

A key point of interest is how much of the state's procurement expenditure is with SMEs. As in 2017 and 2018, the majority of 2019 analysed spend (52%) is with SMEs, down one percentage point from 2018. One contributing factor to this slight reduction is the larger spend in the Medical, Surgical and Pharmaceutical Supplies category where a greater number of suppliers tend to be larger companies and are based outside the state. The 2019 analysed spend with SMEs was €2.567 billion, €10m lower than 2018. It is also noteworthy that given reduction in the data available to analyse, as referred to in Section 2.1 of this report, it is likely that the percentage and value of 2019 actual spend is greater than the figures reported here.

The supplier profile of the analysed spend from 2017 - 2019 is shown in Table 2.4 and Figure 2.4 below.

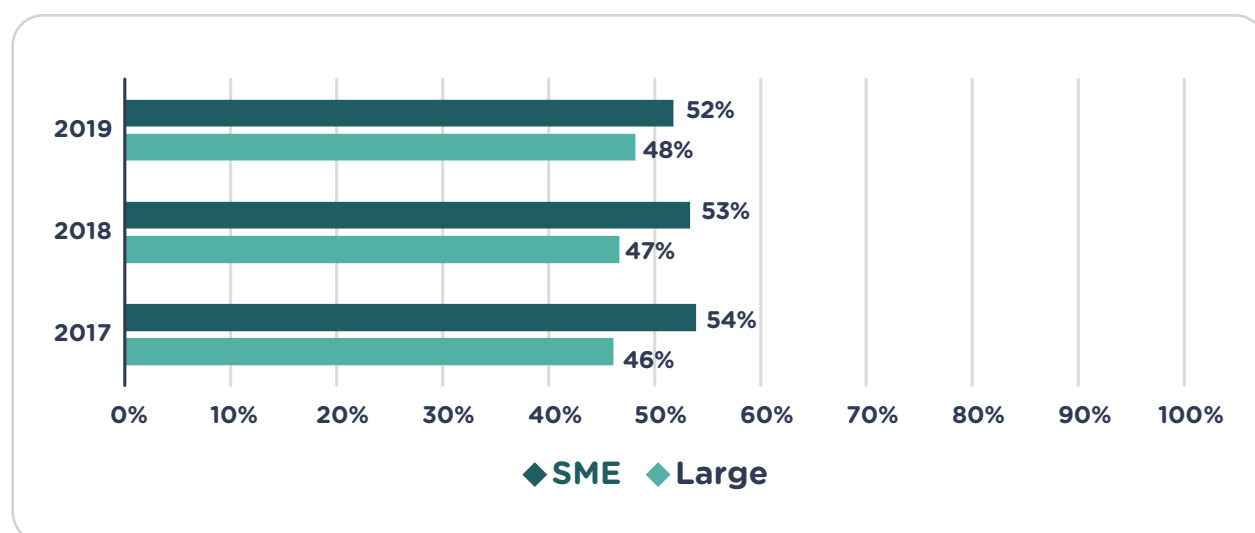


Figure 2.4: Supplier Profile of Total Analysed Spend 2017 - 2019

Supplier Profile	2017	2018	2019
	Spend (€m)	Spend (€m)	Spend (€m)
SME	2,647	2,577	2,567
Large	2,265	2,254	2,388

Table 2.4: Supplier Profile of Total Analysed Spend 2017 - 2019

## 2.5 2019 Supplier Type by Category

Table 2.5 and Figure 2.5 show the Analysed Spend per Category by Supplier Type for 2017 - 2019. Both the table and the graph are arranged in descending order of the 2019 SME share of spend per category.

- 11 of the 16 procurement spend categories remain predominantly SME (i.e. greater than or equal to the overall 52% SME share of spend), down one percentage point on 2018 and ranging from 95% in Plant Hire to 55% in Professional Services.
- The SME share in Fleet and Plant is 81%, while Minor Building Works and Civils as well as Marketing, Print and Stationary are both 72% respectively.
- Five categories have a large supplier profile i.e. more than 48% of the analysed spend for the category is with large companies – Utilities (92%), Medical, Surgical and Pharmaceutical Supplies (73%), Managed Services (72%), Defence (57%) and ICT and Office Equipment (52%).

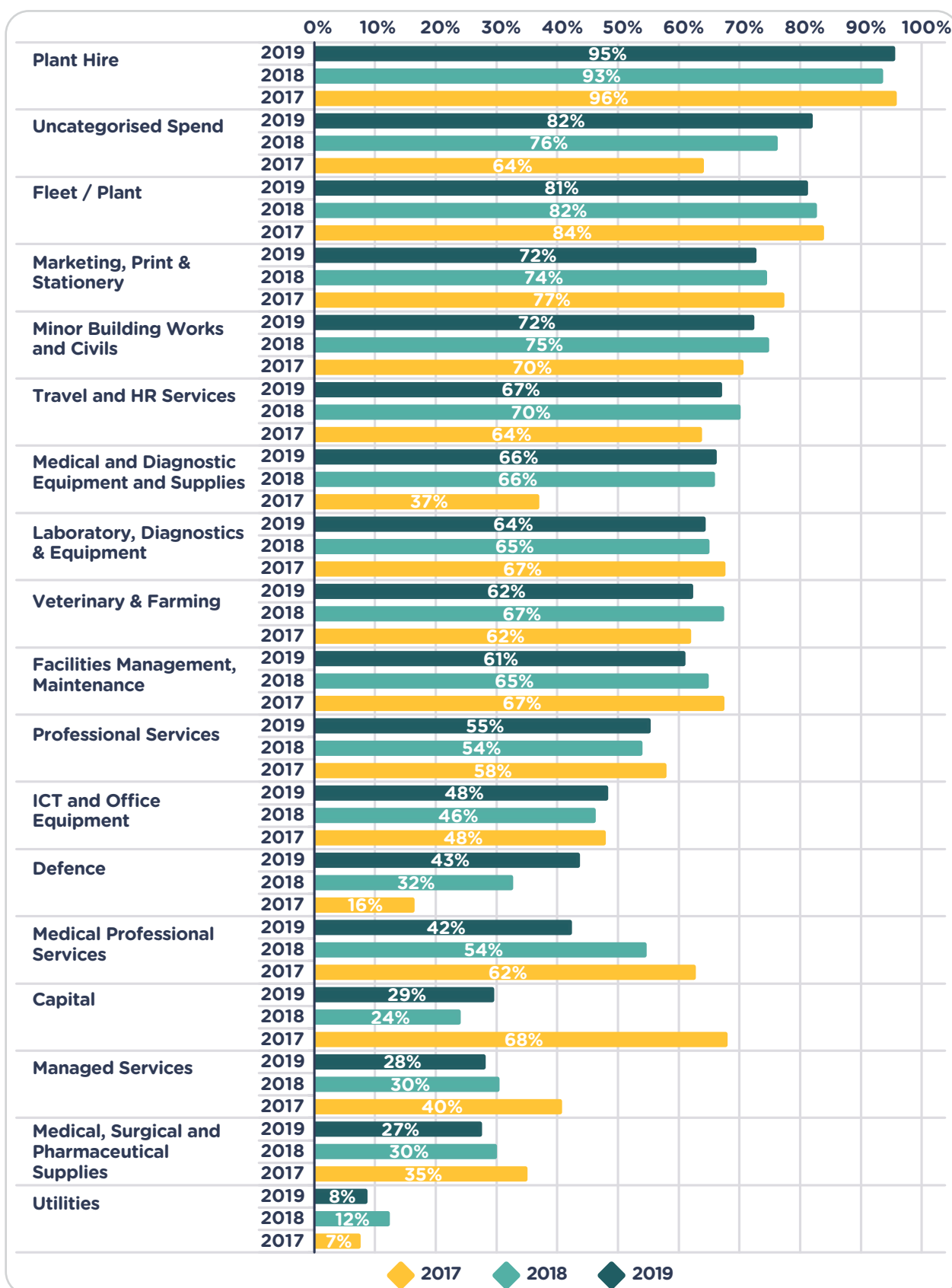


Figure 2.5: SME Share of Category Spend 2017 - 2019

Spend Category	2017			2018			2019		
	Total Category Spend	% Category Spend by Supplier Type		Total Category Spend	% Category Spend by Supplier Type		Total Category Spend	% Category Spend by Supplier Type	
	(€m)	SME	Large	(€m)	SME	Large	(€m)	SME	Large
Plant Hire	32	96%	4%	31	93%	7%	34	95%	5%
Uncategorised Spend	53	64%	36%	50	76%	24%	50	82%	18%
Fleet / Plant	152	84%	16%	146	82%	18%	138	81%	19%
Marketing, Print and Stationery	117	77%	23%	122	74%	26%	119	72%	28%
Minor Building Works and Civils	469	70%	30%	561	75%	25%	627	72%	28%
Travel and HR Services	108	64%	36%	127	70%	30%	131	67%	33%
Medical and Diagnostic Equipment and Supplies	462	37%	63%	285	66%	34%	376	66%	34%
Laboratory, Diagnostics and Equipment	133	67%	33%	152	65%	35%	140	64%	36%
Veterinary and Farming	8	62%	38%	9	67%	33%	9	62%	38%
Facilities Management, Maintenance	727	67%	33%	714	65%	35%	633	61%	39%
Professional Services	650	58%	42%	655	54%	46%	738	55%	45%
ICT and Office Equipment	396	48%	52%	413	46%	54%	379	48%	52%
Defence	42	16%	84%	24	32%	68%	18	43%	57%
Medical Professional Services	235	62%	38%	300	54%	46%	282	42%	58%
Capital	261	68%	32%	77	24%	76%	85	29%	71%
Managed Services	133	40%	60%	118	30%	70%	119	28%	72%
Medical, Surgical and Pharmaceutical Supplies	724	35%	65%	827	30%	70%	869	27%	73%
Utilities	210	7%	93%	220	12%	88%	207	8%	92%
<b>Total Analysed Spend</b>	<b>4,912</b>	<b>54%</b>	<b>46%</b>	<b>4,831</b>	<b>53%</b>	<b>47%</b>	<b>4,955</b>	<b>52%</b>	<b>48%</b>

Table 2.5: SME Share of Category Spend 2017 - 2019

## 2.6 Summary of 2019 Spend Analysis

The following are the key points in the 2019 spend analysis.

- Total value of 2019 spend analysed is €4.955 billion, €124 million higher than the 2018 analysed spend figure of €4.831 billion. 2019 spend data from 61 PSBs was analysed as against 69 for the 2018 spend data.
- SMEs continue to have the greater share of spend in 11 of the 16 procurement spend categories.
- Overall, 52% of analysed spend for 2019 was with SMEs which is in line with that analysed in 2017 and 2018.
- 92% of the 2019 analysed spend is within the State, unchanged from the 2018 report total.
- Medical, Surgical and Pharmaceutical Supplies is the largest procurement category with 18% share of analysed spend.

# 3

## Tendering Analysis



## 3.1 Tendering Analysis

The data used for Section 3 of the report comes solely from the eTenders platform. The accuracy of the analysed data from the eTenders platform is dependent on the public service contracting authorities who provide it through their creation of tender and award notices. The management of the electronic tendering process for a public contract and the administration of the contract once awarded is a matter for each contracting authority. While the tendering process is facilitated through the electronic procurement platform, eTenders, the complete data on public contracts is held by the contracting authority concerned.

Section 3 of the report analyses the 2019 tendering activity data with comparisons to 2017 and 2018 and includes an update on the 2018 contract award analysis contained in the 2018 published report. It should be noted that all monetary values contained in the tendering analysis are exclusive of VAT. Some more background information on tendering data is available at Section 1.3 in the Introduction chapter.

Caution should be applied when considering the total estimated contract value of the analysed tender notices. This figure relates to the estimated value over the entire contract term that typically ranges from one to four years. These estimated values are included in the individual tender notices before going to market and the actual value of the awarded contracts may differ. It is important to note that the values used in the tendering award analysis are the estimated contract values contained in the associated published tender notices.

The total number of tender notices analysed may include tenders that have been withdrawn or not actually awarded. Tenders cancelled after they are published may not always be recorded via eTenders and this should also be borne in mind in reviewing the analysis.

### 3.2 Non-OJEU and OJEU Tender Notices 2019

All tender and contract award notices are classified as either OJEU (above the thresholds that require publication in the Official Journal of the European Union) or as Non-OJEU (below those thresholds and subject to national procurement rules). (Please refer to Appendix 2 for threshold details.)

Table 3.1 shows that 75% of the 5,004 published tender notices analysed are for Non-OJEU tenders and account for 12.36% of the total estimated tender value. OJEU tenders account for 25% of tender notice volume and 87.64% of the estimated tender notice value.

Published Tender Notice	Total Volume	% Tender Notice Volume	Total Estimated Value (€m)	% Total Estimated Value	Average Estimated Value (€m)	Median Estimated Value (€m)
Non-OJEU	3,734	75%	934	12.36%	0.25	0.07
OJEU	1,270	25%	6,626	87.64%	5.22	0.57
<b>Total</b>	<b>5,004</b>		<b>7,560</b>		<b>1.51</b>	<b>0.11</b>

Table 3.1: 2019 Tender Notices Non-OJEU and OJEU

Figure 3.1 shows that, as expected, OJEU notices have higher published estimated values than Non-OJEU notices. The median (middle value) is a better measure of the typical estimated tender notice value than the average as a low number of high value contracts would skew the average value.

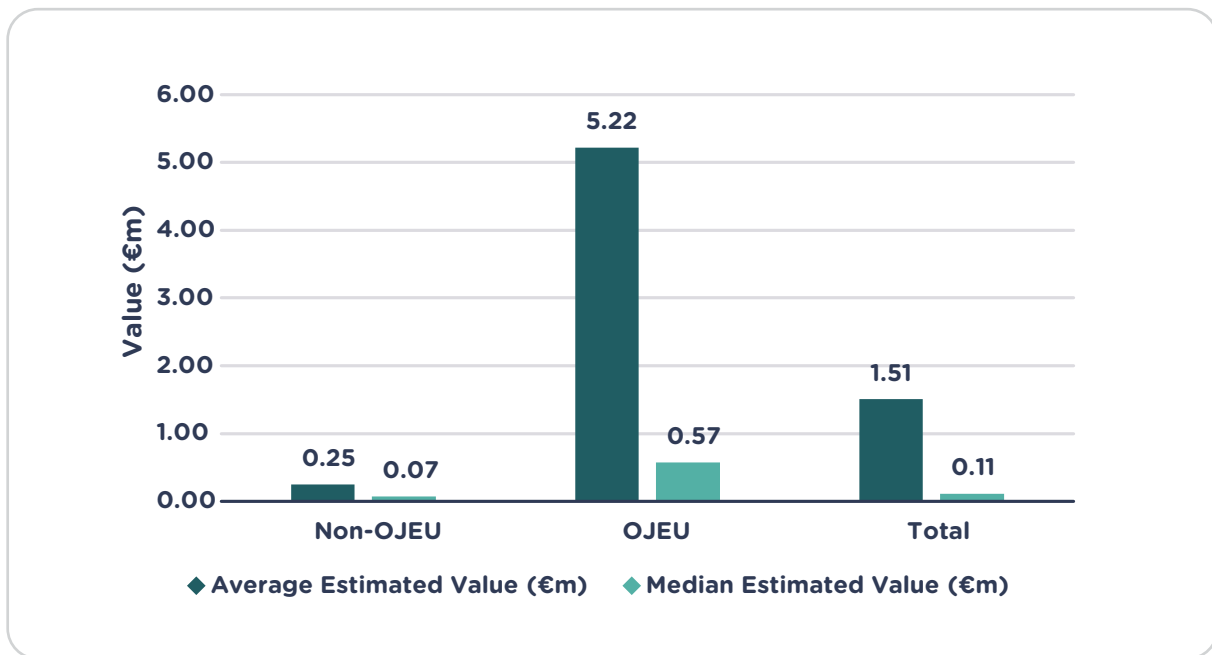


Figure 3.1: 2019 Tender Notices – Average, Median Values for Non-OJEU, OJEU and Total Notices



### 3.3 Non-OJEU and OJEU Tender Notices 2017 - 2019

Table 3.2 shows the split of 2019 tender notices analysed between Non-OJEU and OJEU compared to that for 2017 and 2018.

At 3,734, the number of Non-OJEU tenders analysed is 10.8% higher than in 2018 with a total estimated contract value of €934 million, a 4.12% increase on 2018. The number of OJEU tenders analysed was 1,270, 21.76% increase than 2018. The total estimated contract value for OJEU tenders is €6.626 billion, 43.3% decrease on the 2018 figure. Tendering activity is cyclical and the decrease is primarily attributable to a small number of notices in the Utilities, Construction and Civils spend categories where the combined estimated contract value is in excess of €5 billion.

Figure 3.2 shows Non-OJEU and OJEU tender volumes from 2017 to 2019 while Figure 3.3 shows tender values for the same period.

Analysed Tender Notices	2017		2018		2019	
	Volume	Value (€m)	Volume	Value (€m)	Volume	Value (€m)
Non-OJEU	3,302	564	3,370	897	3,734	934
OJEU	1,086	5,593	1,043	11,702	1,270	6,626
<b>Total</b>	<b>4,388</b>	<b>6,157</b>	<b>4,413</b>	<b>12,599</b>	<b>5,004</b>	<b>7,560</b>

Table 3.2: Non-OJEU and OJEU Tender Notices 2017 - 2019

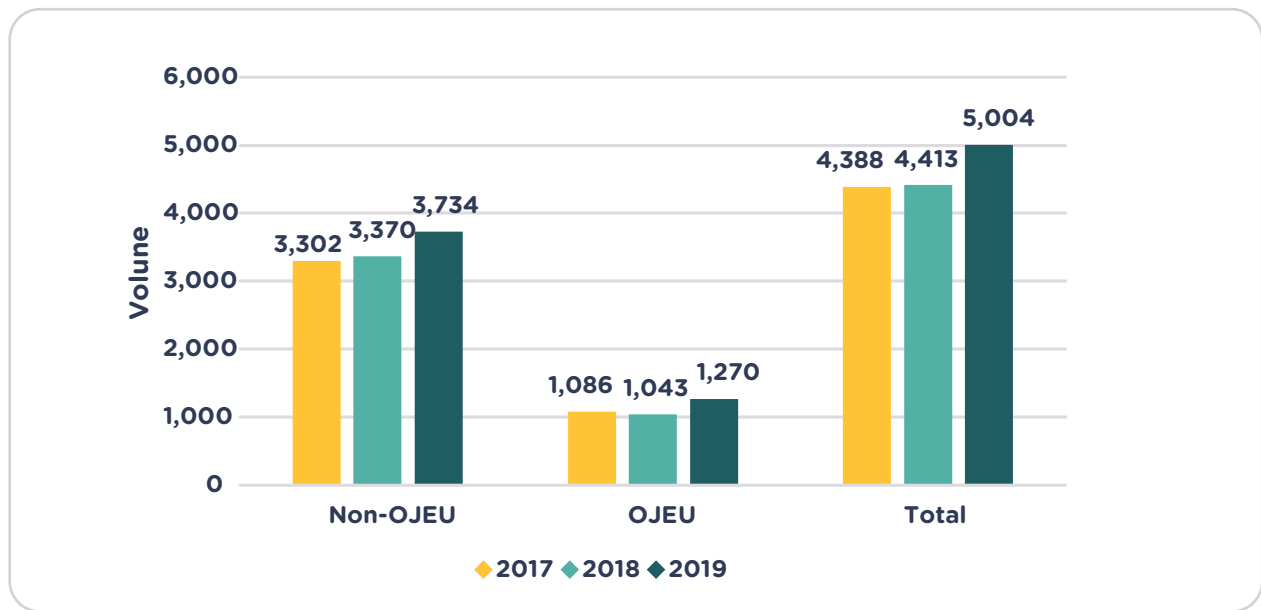


Figure 3.2: Non-OJEU and OJEU Tender Notice Volumes 2017 - 2019

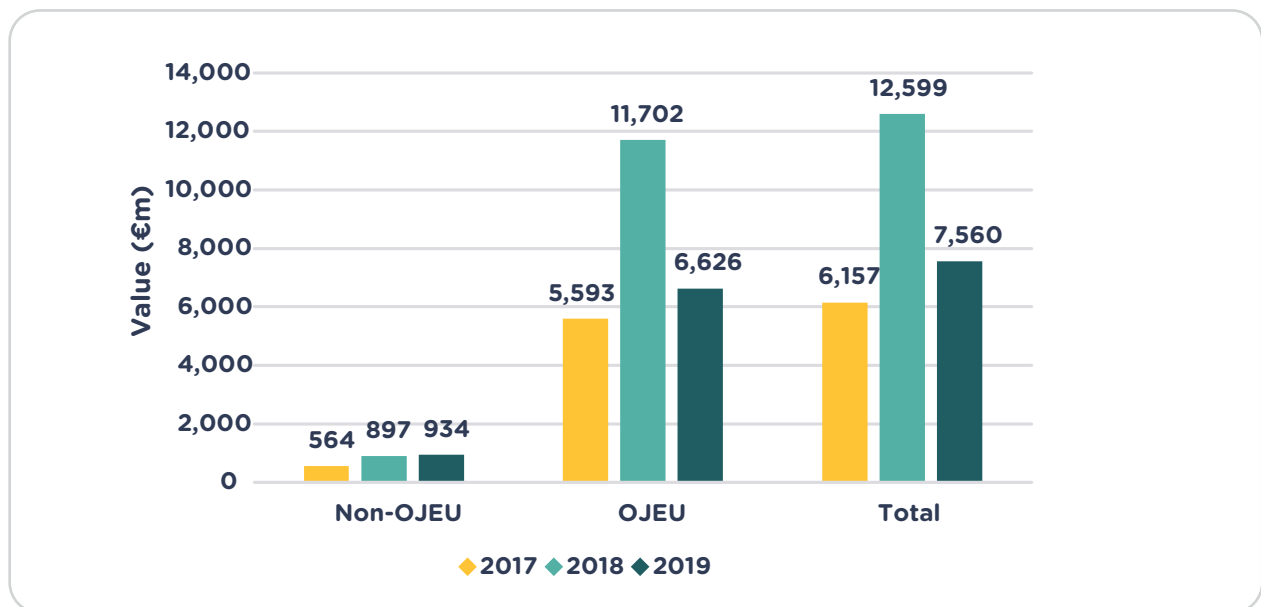


Figure 3.3: Non-OJEU and OJEU Analysed Tender Notice Estimated Values (€) 2017 - 2019

### 3.4 Tender Notices by Category 2017 - 2019

As stated earlier in the report, the OGP follows a 'Category Management' approach to procurement, using an agreed standard taxonomy for categorisation of goods and services across all public bodies. Details of what each category includes is set out in Appendix 4.

Table 3.3 analyses the volume and value of analysed tender notices published by spend category for 2017, 2018 and 2019. The categories are arranged based on the 2019 data in descending order of total value. It should be noted that Construction and Civils Works category includes both major and minor building works and civils. This category would be equivalent to combining the Minor Building Works and Civils category with the Capital category in the spend analysis in Section 2. The Common Procurement Vocabulary (CPV) codes associated with a small number of tender notices could not be mapped to a spend category and these notices are described as 'Uncategorised'.

The volume and value of tender notices vary considerably from one category to another as can be seen in Table 3.3. The following should be borne in mind when reviewing this table, the median is a better measure of the typical estimated contract value than the average in situations where the distribution is skewed i.e. the population data includes a small number of very large value tenders and a much larger number of smaller value tenders. The capacity of many SMEs would be better matched to smaller value tenders and this analysis indicates that there are tender opportunities accessible to this business sector.

The average estimated value of 2019 published tender notices analysed for 2019 is €1.51 million as against €2.85 million in 2018. The median (typical) estimated contract values for tenders analysed in 2019 is up from 2018 at €110,000.

Construction and Civils Works is the highest value tender notice category ahead of Professional Services. At €3.510 billion the total estimated contract value for Construction and Civils Works tender notices for 2018 is €1.825 billion lower than 2019. The mean (average) tender notice value for this category in 2019 is €2.26 million, the median (typical) tender notice value is €140,000.

Spend Category	2017					
	Volume of Tender Notices				Estimated Value of Tender Notices	
	Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)
Construction and Civils Works	1,240	28%	2,593	42%	2.09	0.10
Professional Services	617	14%	566	9%	0.92	0.07
Fleet / Plant	329	8%	188	3%	0.57	0.10
Managed Services	432	10%	347	6%	0.80	0.08
Facilities Management, Maintenance	444	10%	230	4%	0.52	0.07
Information and Communication Technology, and Office Equipment	570	13%	650	11%	1.14	0.09
Medical and Diagnostic Equipment and Supplies	110	3%	159	3%	1.45	0.06
Uncategorised Spend	20	0%	89	1%	4.47	0.12
Travel and HR Services	202	5%	797	13%	3.94	0.08
Medical Professional Services	70	2%	104	2%	1.49	0.08
Laboratory, Diagnostics and Equipment	164	4%	104	2%	0.64	0.09
Marketing, Print and Stationery	36	1%	22	0%	0.61	0.08
Defence	30	1%	37	1%	1.24	0.06
Medical, Surgical and Pharmaceutical Supplies	23	1%	44	1%	1.92	0.23
Veterinary & Farming	88	2%	25	0%	0.29	0.08
Utilities	12	0%	201	3%	16.72	0.05
Plant Hire	1	0%	0	0%	0.40	0.40
<b>Grand Total</b>	<b>4,388</b>	<b>100%</b>	<b>6,157</b>	<b>100%</b>	<b>1.38</b>	<b>0.08</b>

Table 3.3: Tender Notice by Category 2017 - 2019

Note: Landscape Version of Table 3.3 available on page 60

2018						2019					
Volume of Tender Notices				Estimated Value of Tender Notices		Volume of Tender Notices				Estimated Value of Tender Notices	
Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)	Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)
1,295	29%	5,335	42%	4.12	0.14	1,552	31%	3,510	46.4%	2.26	0.14
641	15%	1,291	10%	2.01	0.08	801	16%	992	13.1%	1.24	0.13
381	9%	180	1%	0.47	0.08	374	7.5%	654	8.7%	1.75	0.10
395	9%	443	4%	1.12	0.10	415	8.3%	590	7.8%	1.42	0.10
394	9%	203	2%	0.51	0.07	461	9.2%	577	7.6%	1.25	0.10
528	12%	436	3%	1.12	0.10	553	11.1%	467	6.2%	0.85	0.10
79	2%	94	1%	1.20	0.06	109	2.2%	232	3.1%	2.13	0.06
63	1%	332	3%	5.27	0.07	21	0.4%	149	1.7%	7.08	0.25
231	5%	133	1%	0.57	0.08	257	5.1%	122	1.6%	0.47	0.10
63	1%	72	1%	1.15	0.10	73	1.5%	116	1.5%	1.59	0.12
143	3%	662	5.3%	4.63	0.05	143	2.9%	40	0.5%	0.28	0.10
44	1%	17	0.1%	0.39	0.09	46	0.9%	36	0.5%	0.79	0.10
57	1%	10	0.1%	0.18	0.06	58	1.2%	33	0.4%	0.57	0.08
17	0.4%	53	0.4%	3.12	0.09	34	0.7%	23	0.3%	0.68	0.15
68	2%	10	0.1%	0.14	0.05	89	1.8%	14	0.2%	0.02	0.06
12	0.3%	3,325	26.4%	277.06	1.59	16	0.3%	5	0.1%	0.33	0.10
2	0.1%	0	0%	0.20	0.20	2	0.0%	0	0.0%	0.15	0.15
<b>4,413</b>	<b>100%</b>	<b>12,598</b>	<b>100%</b>	<b>2.85</b>	<b>0.10</b>	<b>5,004</b>	<b>100%</b>	<b>7,560</b>	<b>100%</b>	<b>1.51</b>	<b>0.11</b>

### 3.5 2019 In-Year Contract Award Notices

Section 3.4 analyses 2019 'in-year' awards – award notices published in 2019 for tender notices published in 2019. It is important to note that the values used in the tendering award analysis are the estimated contract values contained in the associated published tender notices.

Table 3.4 sets out the volume of the in-year contract award notices (1,214) published in 2019 and the associated total, average and median values for awards and split by OJEU and Non-OJEU. OJEU award notices are 33.86% (411) of the total in-year award notices while Non-OJEU are 66.14% (803). The OJEU award notices account for 86.72% (€859.47 million) of the total value while the 13.28% balance (€131.66 million) is Non-OJEU. The average estimated value for total 2019 in-year contract award value is €820,000 while the median estimated award value is €120,000.

Contract Award Notices	Number of Tender Notices Analysed	Number of Award Notices	Total Estimated Value (€m)
Number of Tender Notices Analysed	5,004	1,270	3,734
Number of Award Notices	1,214	411	803
Total Estimated Award Value (€m)	991.13	859.47	131.66
Average Estimated Award Value (€m)	0.82	2.09	0.16
Median Estimated Award Value (€m)	0.12	0.43	0.07

Table 3.4: 2019 In-Year Contract Award Notices

### 3.6 In-Year Contract Award Notices 2017 - 2019

Table 3.5 sets out 2019 in-year contract award notices along with those for 2017 and 2018. The number of 'in-year' award notices published (i.e. award notices published in 2019 for notices published in 2019) is 11.38% higher at 1,214, up from 1,090 'in-year' awards in 2018. Non-OJEU award notices are 2.69% higher at 803 for 2019 while OJEU award notices are 33.44% higher at 411.

The percentage of total 2019 in-year contract award notices relative to tender notices published was 24%, 1% lower than 2018. Non-OJEU ratios decreased by 1% while OJEU ratios increased by 2%.

The total estimated award value for 2019 is €991 million, equal to 2018. The average estimated value of 2019 award notices is €0.82 million, €90,000 lower than 2018. The 2019 median value of €120,000 is increased on 2018. As the average estimated contract award value may be skewed by a small volume of high or low contract award values, the median is a better indicator of the most prevalent value and is a better method for indicating what a 'typical' contract award value may be.

Contract Award Notices	2017			2018			2019		
	Total	OJEU	Non-OJEU	Total	OJEU	Non-OJEU	Total	OJEU	Non-OJEU
Number of Tender Notices Analysed	4,388	1,086	3,302	4,413	1,043	3,370	5,004	1,270	3,734
Number of Award Notices	1,032	351	681	1,090	308	782	1,214	411	803
Award as a % of Tenders	24%	32%	21%	25%	30%	23%	24%	32%	22%
Total Estimated Value (€m)	1,492	1,409	83	991	820	170	991	859	132
Average Estimated Value (€m)	1.45	4.02	0.12	0.91	2.66	0.22	0.82	2.09	0.16
Median Estimated Award Value (€m)	0.10	0.37	0.05	0.10	0.46	0.06	0.12	0.43	0.07

Table 3.5: In-Year Contract Award Notices 2017 - 2019

### 3.7 In-Year Contract Award Notices by Category 2017 - 2019

Table 3.6 contains a breakdown of the volume and estimated value of contract award notices by procurement spend category for 2017 – 2019. As pointed out earlier the Construction and Civils Works category includes both major and minor building works and civils. This category would be equivalent to combining the Minor Building Works and Civils category with the Capital category in the spend analysis in Section 2.

Spend Category	2017			
	Volume of Tender Notices		Estimated Value of Tender Notices	
	Volume	Total Value (€m)	Average Value (€m)	Median Value (€m)
Information and Communication Technology, and Office Equipment	174	84.15	0.48	0.10
Construction and Civils Works	141	689.91	4.89	0.12
Professional Services	135	154.28	1.14	0.07
Managed Services	131	63.36	0.48	0.09
Facilities Management, Maintenance	105	77.31	0.74	0.09
Fleet / Plant	92	42.39	0.46	0.14
Travel and HR Services	48	27.67	0.58	0.15
Medical Professional Services	25	21.00	0.84	0.08
Uncategorised Spend	5	55.02	11.00	1.11
Marketing, Print and Stationery	12	11.57	0.96	0.10
Medical, Surgical and Pharmaceutical Supplies	9	17.55	1.95	0.06
Laboratory, Diagnostics and Equipment	72	28.28	0.39	0.10
Medical and Diagnostic Equipment and Supplies	27	12.27	0.45	0.08
Defence	14	1.93	0.14	0.06
Veterinary & Farming	34	5.14	0.15	0.09
Utilities	8	200.63	25.08	0.11
Plant Hire	0	0.00	0.00	0.00
<b>Grand Total</b>	<b>1,032</b>	<b>1,492</b>	<b>1.45</b>	<b>0.10</b>

Table 3.6: In-Year Awards by Category 2017 - 2019

Note: Landscape Version of Table 3.6 available on page 61



The Common Procurement Vocabulary (CPV) codes associated with a small number of tender notices could not be readily mapped to a spend category and these notices are described as 'Uncategorised'. The data in the table is presented based on the descending order of award value by category in 2019.

2018				2019			
Volume of Tender Notices		Estimated Value of Tender Notices		Volume of Tender Notices		Estimated Value of Tender Notices	
Volume	Total Value (€m)	Average Value (€m)	Median Value (€m)	Volume	Total Value (€m)	Average Value (€m)	Median Value (€m)
162	81.24	0.50	0.10	185	226.83	1.23	0.14
228	221.99	0.97	0.12	222	143.78	0.65	0.12
152	95.73	0.63	0.07	182	128.40	0.71	0.12
135	203.79	1.51	0.14	131	113.53	0.87	0.12
102	63.98	0.63	0.07	134	87.83	0.66	0.10
108	31.32	0.29	0.12	125	81.94	0.66	0.12
53	23.45	0.44	0.06	67	64.20	0.96	0.14
13	7.50	0.58	0.10	11	52.41	4.76	0.18
10	193.86	19.39	0.07	10	41.68	4.17	0.37
17	11.52	0.68	0.10	21	20.46	0.97	0.10
7	2.51	0.36	0.15	11	10.26	0.93	0.15
48	14.19	0.30	0.06	54	9.83	0.18	0.11
9	24.10	2.68	0.20	21	3.44	0.16	0.07
25	7.67	0.31	0.10	16	3.40	0.21	0.10
16	1.99	0.12	0.07	20	2.84	0.14	0.10
4	5.63	1.41	1.05	3	0.19	0.06	0.01
1	0.29	0.29	0.29	1	0.12	0.12	0.12
<b>1,090</b>	<b>990.76</b>	<b>0.91</b>	<b>0.10</b>	<b>1,214</b>	<b>991.13</b>	<b>0.82</b>	<b>0.12</b>

### 3.8 2018 Tendering Analysis Update

The *Public Service Spend and Tendering Analysis Report 2018* analysed contract award notices published in 2018 that related to tender notices published in 2018 i.e. in-year awards. It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process. In this report, the contract award notices information published since the end of 2018 for tender notices issued in 2018 gives a more complete view of the ‘total’ awards for 2018 notices.

Table 3.7 summarises the volume and value of both in-year and total contract award notices issued in respect of tender notices published in 2018. The volume of total contract award notices (2,147) is 97% greater than the ‘in-year’ awards of 1,090 award notices. The 2018 total estimated award value of €6.153 billion is over six times the 2018 in-year estimated award value of €911 million.

	2018 In-Year Awards	2018 Total Awards
Number of Contract Award Notices	1,090	2,147
Total Estimated Contract Awards Value (€m)	991	6,153

Table 3.7: 2018 In-Year Contract Award Notices

Table 3.8 breaks down the volume and value of 2018 in-year awards and 2018 total contract awards notices by Non-OJEU and OJEU thresholds and includes the average and median award values. As would be expected, OJEU award notices have higher average estimated values than Non-OJEU notices. At €2.87 million the average estimated value of 2018 total awards is €1.96 million higher than the 2018 in-year awards while the median award value is €20,000 higher at €120,000.

	2018 In-Year Awards			2018 Total Awards		
	TOTAL	OJEU	Non-OJEU	TOTAL	OJEU	Non-OJEU
Number of Award Notices	1,090	308	782	2,147	768	1,379
Total Estimated Awards Value (€m)	991	820	170	6,153	5,791.06	361.95
Average Estimated Awards Value (€m)	0.91	2.66	0.22	2.87	7.54	0.26
Median Estimated Awards Value (€m)	0.10	0.46	0.06	0.12	0.60	0.06

Table 3.8: 2018 Contract Awards Non-OJEU and OJEU

4,413 tender notices were analysed in the 2018 report. As illustrated in Table 3.9, the percentage of 2018 in-year contract award notices relative to tender notices published is 25%; and that for the total 2018 awards is 49%. For OJEU and Non-OJEU total awards the comparable percentages are 74% and 41%. It should be noted that as withdrawals or cancellations of tenders may take place after publication of the notice and not be recorded on eTenders this could adversely impact the ratio of awards to tender notices.

	Total	OJEU	Non-OJEU
Number of Tender Notices Analysed	4,413	1,043	3,370
Number of In-Year Award Notices	1,090	308	782
In-Year Awards as a % of Tender Notices	25%	30%	23%
Number of Total Year Award Notices	2,147	768	1,379
Total Year Awards as a % of Tender Notices	49%	74%	41%

Table 3.9: 2018 Contract Awards relative to Tender Notices

### 3.9 Summary of Tendering Analysis

- 1) At 5,004, the number of published tender notices analysed is 13.39% higher than in 2018.
- 2) The estimated contract value of 2019 analysed published tender notices is 40% lower at €7.560 billion (down from €12.599 billion in 2018).
- 3) The average estimated value of 2019 published tender notices analysed is €1.51 million as against €2.85 million in 2018. The median (typical) estimated contract values for tenders analysed in 2018 is 10% higher than 2018 at €110,000.
- 4) 75% (3,734) of tender notices analysed are below the Official Journal of the European Union (OJEU) tender thresholds, accounting for an estimated value of €934 million. This represents 12.36% of all 2019 published tender estimated values. (See Appendix 2 for details of OJEU thresholds).
- 5) The Construction and Civils Works category accounts for the largest share (€3.510 billion) of the total estimated contract value of published analysed tender notices with an average contract value of €2.26 million and a median (typical) value of €140,000.

- 6)** The average estimated contract value of 2019 tender notices analysed by category ranges from €7.08 million (Uncategorised Spend) to €20,000 (Veterinary & Farming) while the median values range from €250,000 (Uncategorised Spend) to €60,000 (Veterinary & Farming).
- 7)** The median estimated contract value of 2019 tender notices is less than or equal to €110,000 in 11 of the 16 spend categories.
- 8)** The number of 'in-year' award notices published (i.e. award notices published in 2019 for notices published in 2019) is 11.38% higher at 1,214, up from 1,090 'in-year' awards in 2018.
- 9)** Total in-year award notices as a percentage of tender notices published is 24% for 2019, this is a percentage point decrease on the 2018 value.

# 4

## Conclusion



## 4. Conclusion

The OGP is leading the Procurement Reform Programme and, along with Central Purchasing Bodies (CPBs) for Health, Education, Local Government and Defence has created centralised procurement structures for goods, services and minor works. A key element of this reform is the gathering by the OGP of national procurement expenditure data to enable the development of effective procurement policies and optimal sourcing strategies.

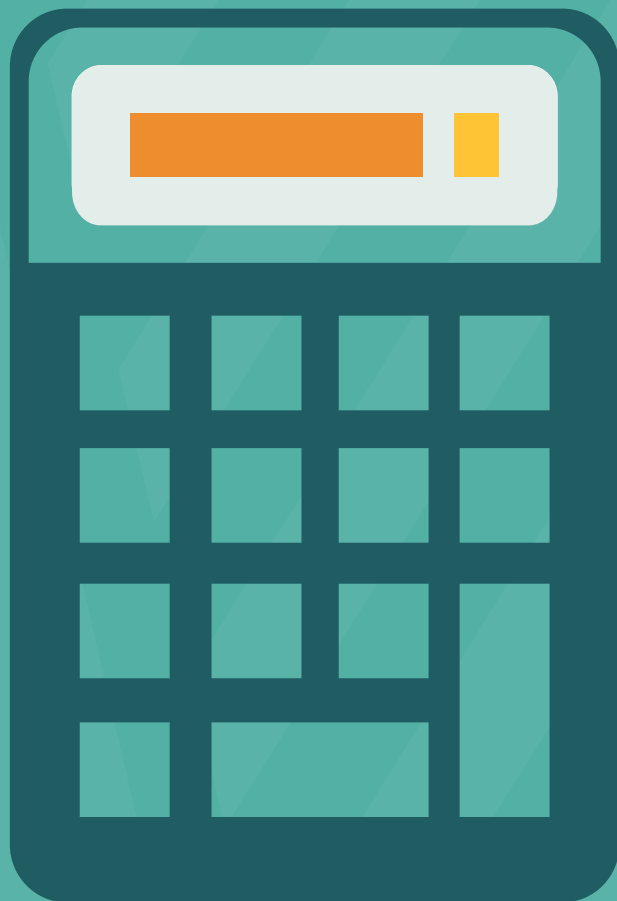
The 2019 spend analysis of 83% (€4.955 billion) of the estimated annual procurement addressable spend of €6 billion indicates that 92% of the State's expenditure is with firms within Ireland and the majority (52%) of the State's expenditure is with SMEs. SMEs have the greater share of spend analysed in 11 of the 16 procurement spend categories ranging from 95% in Plant Hire to 55% in Professional Services. As PSBs do not, in general, record a breakdown of line level information relating to expenditure, analysis is limited to a summary level across the procurement spend categories.

This report summarises the tendering activity of the public service in 2019 as recorded on the eTenders electronic tendering platform. The analysis shows that 75% of the 5,004 tender notices analysed are smaller value (below OJEU threshold) tenders. The median estimated contract value of 2019 tender notices is less than or equal to €110,000 in 11 of the 16 spend categories.

The tendering analysis gives a more complete view of the 2019 tender cycle by looking at contract award notices published since the end of 2019 that relate to tender notices published in 2019. This shows that the volume of total contract award notices (2,147) is almost double the 'in-year' awards of 1,090 award notices. It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process.

The spend data repository that has been created by the OGP supports both the analysis required under the centralised procurement model to deliver value for money and enable savings for the taxpayer and informing the commercial strategies necessary to encourage SME access to public procurement opportunities. The ongoing analysis of spend and tendering activity data and the resulting insights will enable the OGP to formulate objective and evidence-based public procurement policies.

# Appendices



## Appendix 1 – Public Service Body Definition

### Public Service Body Definition:

*Definition as per Ministers and Secretaries (Amendment) Act 2011:*

Section 3 (1) For the purposes of this Act, each of the following is a public service body, and “public service” shall be construed accordingly:

- (a) the Civil Service of the State;
- (b) the Civil Service of the Government;
- (c) the Garda Síochána;
- (d) the Permanent Defence Force within the meaning of the Defence Act 1954;
- (e) a local authority within the meaning of the Local Government Act 2014;
- (f) the Health Service Executive;
- (g) a vocational education committee established by section 7 of the Vocational Education Act 1930;

### Commercial Semi-State Bodies Definition:

*Definition as per the Ministers and Secretaries (Amendment) Act 2011:*

Section 10(2) In this section “public service body” does not include a body specified in Schedule 1 or a subsidiary (within the meaning of section 155 of the Act of 1963) of such a body.

### Schedule 1 Provides as follows:

- 1) A body whose activities are commercial in character and that was established by or under a statute that—
  - a) was in force in Saorstát Éireann immediately before the date of the coming into operation of the Constitution, and
  - b) continues to be of full force and effect by virtue of Article 50 of the Constitution.
- 2) Dublin Airport Authority, public limited company.
- 3) Cork Airport Authority, public limited company.



- 4)** Shannon Airport Authority, public limited company.
- 5)** Bord Gáis Éireann.
- 6)** Bord na gCon.
- 7)** Bord na Móna, public limited company.
- 8)** Córas Iompair Éireann.
- 9)** Coillte Teoranta.
- 10)** Electricity Supply Board.
- 11)** EirGrid.
- 12)** A harbour authority within the meaning of the Harbours Act 1946 or a company to which section 7 of the Harbours Act 1996 applies.
- 13)** Horse Racing Ireland.
- 14)** The Irish National Stud Company, Limited.
- 15)** The Irish Aviation Authority.
- 16)** An Post.
- 17)** An Post National Lottery Company.
- 18)** Raidió Teilifís Éireann.
- 19)** Teilifís na Gaeilge.
- 20)** Railway Procurement Agency.
- 21)** Voluntary Health Insurance Board.

## Appendix 2 - OJEU Procurement Thresholds

Thresholds (exclusive of VAT) above which advertising of contracts in the Official Journal of the EU (OJEU) is obligatory, applicable from 1 January 2018		
Threshold		Applies to
<b>Works</b>		
Contract Notice	€5,548,000	Government Departments and Offices, Local and Regional Authorities and other public bodies.
<b>Supplies and Services</b>		
Contract Notice	€144,000	Government Departments and Offices.
Contract Notice	€221,000	Local and Regional Authorities and public bodies outside the Utilities sector.
<b>Utilities</b>		
Works Contracts / Prior Indicative Notice	€5,548,000	Entities in Utilities sectors covered by GPA (Government Procurement Agreement as part of the WTO arrangements).
Supplies and Services	€443,000	Entities in Utilities sector covered by GPA.

Tendering activity across the public service consists of opportunities published as “tender notices” on the OGP’s electronic tendering platform, eTenders. Notices greater than a certain threshold are also published in the Official Journal of the EU (OJEU). Under EU Directives on public procurement, public works, utilities, supplies and service contracts above certain thresholds must be advertised (tender notice) and details of the contracts awarded published (contract award notice) in the OJEU.

The eTenders platform processes both national (below threshold) and OJEU-level Request for Tender (RFT) notices, Responses to RFTs and Contract Award notices. Its use is mandatory for all procurements by public bodies for supplies and services greater than €25,000 (exclusive of VAT) and €50,000 (exclusive of VAT) in respect of works and works related services.

## Appendix 3 – Public Service Bodies that provided 2019 Spend Data

Sector	Public Service Body
<b>Central Government</b>	Department of Agriculture, Food and the Marine
	Department of Defence
	Department of Finance
	Department of Public Expenditure and Reform
	National Shared Services Office
	Department of Transport Tourism and Sport
	The Office of the Revenue Commissioners

Sector	Public Service Body
<b>Education</b>	Athlone Institute of Technology
	Cork Institute of Technology
	Dún Laoghaire Institute of Art, Design and Technology
	Dundalk Institute of Technology
	Galway - Mayo Institute of Technology
	Institute of Technology, Tallaght
	Institute of Technology, Tralee
	Letterkenny Institute of Technology
	National University of Ireland Galway (NUIG)
	Trinity College Dublin (TCD)
	University College Cork (UCC)
	University College Dublin (UCD)

Sector	Public Service Body
Health	HSE East Region
	HSE Mid-West Region
	HSE Midlands Region
	HSE North East Region
	HSE South East Region
	HSE Southern Region
	HSE West Region
	Marymount University Hospital & Hospice
	Mater Misericordiae University Hospital
	St. James's Hospital
	Tallaght Hospital

Sector	Public Service Body
<b>Local Authorities</b>	Carlow County Council
	Cavan County Council
	Clare County Council
	Cork City Council
	Cork County Council
	Donegal County Council
	Dublin City Council
	Dun Laoghaire Rathdown Council
	Fingal County Council
	Galway City Council
	Galway County Council
	Kerry County Council
	Kildare County Council
	Kilkenny County Council
	Laois County Council
	Leitrim County Council
	Limerick City and County Council
	Longford County Council
	Louth County Council
	Mayo County Council
	Meath County Council
	Monaghan County Council
	Offaly County Council
	Roscommon County Council
	Sligo County Council
	South Dublin County Council
	Tipperary County Council
	Waterford City and County Council
	Westmeath County Council
	Wexford County Council
	Wicklow County Council

## Appendix 4 - Spend Categories

The OGP have developed a procurement category taxonomy that is used to classify, analyse and report on the type of spend across public service bodies. The following table illustrates the high level category description and the sub-categories contained within that category.

Spend Category	Description of Goods/Services/Works
Professional Services	Actuarial, Advisory, Architect, Audit, Banking, Communication, Creative Services, Financial, Information Technology, Insurance, Legal, Public Relations, Surveying, Research, Temporary Staff/Contractors
Facilities Management, Maintenance	Building Maintenance, Catering Equipment / Supplies and Services, Cleaning Equipment / Supplies and Services, Document Management, Fittings / Furnishings, Health and Safety, Laundry, Rental, Security, Sports Equipment, Uniforms / Clothing, Waste Management
Utilities	Electricity, Gas, Fuels, Water
ICT and Office Equipment	Hardware, Software, Services, Telecoms – Data / Equipment / Mobile / Voice, Postage, Couriers
Marketing, Print and Stationery	Advertising, Creative Media, Promotional Events, IT Consumables / Peripherals, Marketing Printing, Office Printing, Office Supplies, Production Printing
Travel and HR Services	Car Hire, Employee Assistance Programme, Health and Safety, Hotel / Meetings / Incentives / Conferences / Events, Pension, Recruitment, Travel Agency/Travel Services, Training, Transport–Air/Rail/Road
Fleet and Plant	Equipment, Fuel, Maintenance, Other Plant (Lifter, Generator etc.), Vehicles Purchased, Vehicle Fit Out, Vehicle Rental/Leasing/Fleet Hire
Managed Services	Outsourced Services
Minor Building Works and Civil	Building, Civil, Electrical, Materials, Mechanical, Road
Plant Hire	Plant / Equipment Hire (including Driver / Operator)
Medical Professional Services	Carers (Disability Care, Senior Care), Care Services, Locums (Medical Professional)
Medical and Diagnostic Equipment and Supplies (including; Health Informatics)	Medical Equipment, Medical Diagnostic Equipment, Medical Diagnostic Services, Health Information Systems

Spend Category	Description of Goods/Services/Works
Medical, Surgical and Pharmaceutical Supplies	Surgical Equipment and Supplies, Blood / Blood Products, Drugs and Medicines, Medical Gases
Laboratory, Diagnostics and Equipment (including; Health Informatics)	Laboratory Equipment, Laboratory Diagnostic Systems and Supplies
Defence	Aircraft, Aircraft Maintenance, Military Equipment, Military Equipment Maintenance, Naval Vessels, Naval Vessels Maintenance, Ordnance Equipment, Other Military Supplies, Military Vehicles / Maintenance
Veterinary and Farming	Livestock, Feed, Consumables, Equipment, Other, Services, Supplies, Veterinary

## Appendix 5 - Supplier Classification

The analysed spend dataset includes profiles by supplier location (Ireland or International) and supplier size - SME (Small and Medium sized Enterprises) or large.

The SME definition used to classify suppliers by size is European Union recommendation 2003/361 i.e. enterprises where the number of employees is less than 250 and, where data is available, they have either turnover of less than or equal to €50 million or a balance sheet with net assets of less than or equal to €43 million.

Employee numbers data and turnover data are more readily available than balance sheet totals for Irish businesses. Where available, both employee numbers data and turnover data have been used for classification. Otherwise, only employee numbers data has been used.

While some data from eTenders is used for supplier classification along with their address information, the following external third party data sources have been used to enable the OGP to classify supplier data contained in the payments transaction data provided by PSBs:

- Source Dogg
- Dun and Bradstreet
- Irish Times Top 1000 Business List
- Central Statistics Office (CSO) Classification
- SoloCheck.ie



## Appendix 6 - Overview of Data Analysis Methodology

This *Public Service Spend and Tendering Analysis Report for 2019* report is based on two data sets – the first is expenditure data provided by PSBs and the second is related to tendering activities on eTenders, the national procurement platform.

There are different methodologies for the collection, mapping, classification, categorisation and generation of outputs for each of these datasets. An overview of the methodologies used for both the spend and tendering analysis is set out below.

### Spend Data Analysis Methodology

The spend data analysed is based on payment transaction data provided by public service bodies (PSBs) from a range of financial systems. Figure A gives an overview of the analysis methodology showing the steps that take place in PSBs and within OGP.

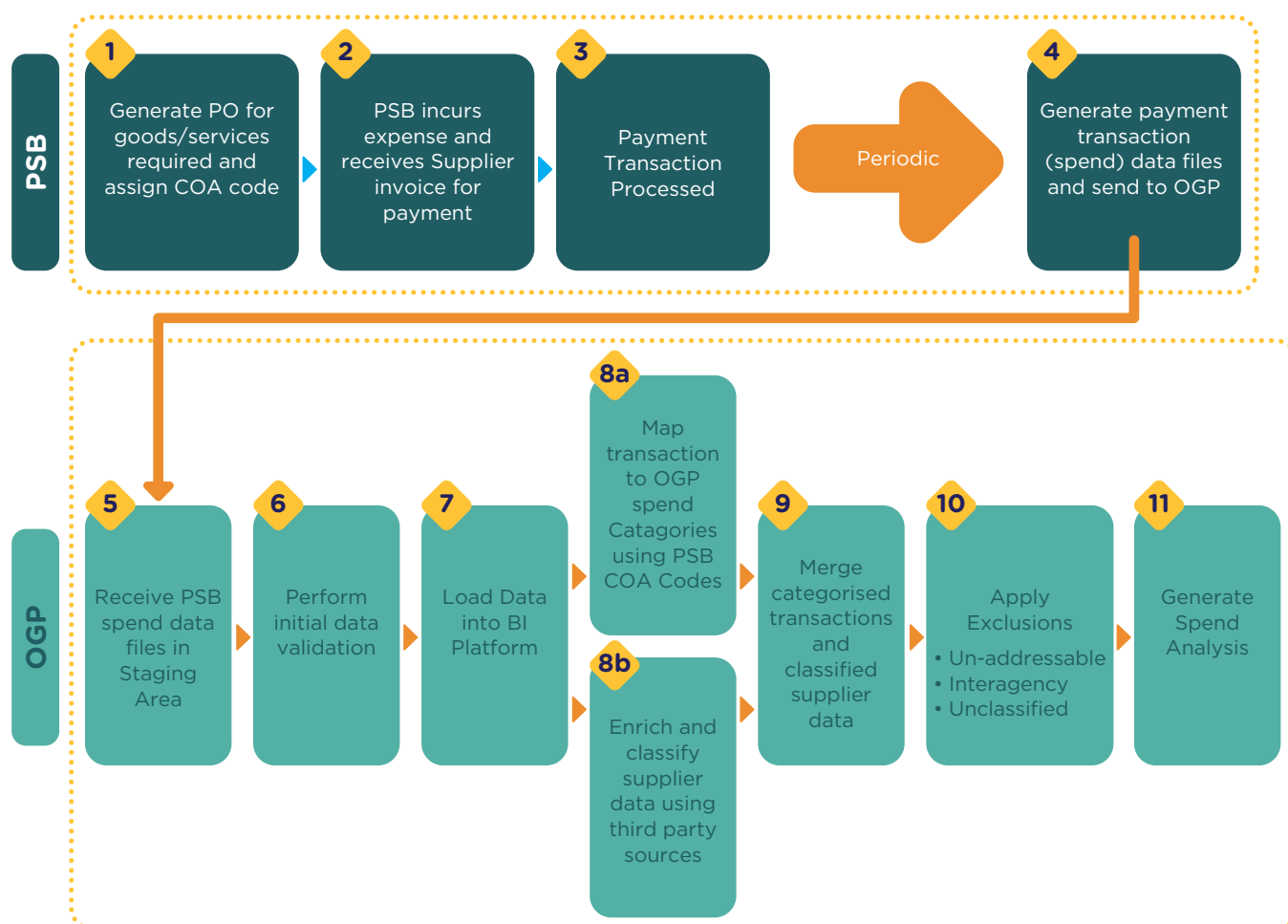


Figure A: Overview of Spend Data Analysis Methodology

## Methodology Steps:

- **Steps 1-3:** take place in the PSBs and represent the standard purchase to payment process carried out on an ongoing basis. Payments are assigned to the relevant COA (Chart of Account) code for that organisation.
- **Step 4:** The PSB generates a spend data file from their financial management system in a standard data template provided by the OGP. The OGP provides assistance where necessary to extract data and convert it to the required format. The frequency of this step is dependent on the procedures of the source PSB. The spend data files are transmitted electronically to a secure file storage area hosted by the OGP.
- **Step 5:** The OGP transfers the PSB spend data files to a staging area.
- **Step 6:** An initial validation takes place to ensure the data provided is in the correct format. Validated files are marked for loading into the OGP BI platform. OGP engages with the PSBs directly to rectify files that fail initial validation.
- **Step 7:** Validated PSB spend data files are loaded into the OGP BI platform.
- **Step 8a:** COA codes contained in the transaction data are mapped to the procurement spend categories based on a reference table created following engagement between the OGP and the PSB. This reference table requires ongoing manual matching of individual PSB COA codes to the procurement spend categories. It is important to note that not all transactions are allocated to a category as the payments concerned are not procurement addressable (e.g. grants).
- **Step 8b:** The supplier data is enriched using external third party data sources (see Appendix 5) to enable classification of suppliers by size i.e. SME or large and location (Republic of Ireland or International). It is important to note that is not possible to classify all suppliers due to reference data limitations.
- **Step 9:** The spend transaction data that has been allocated to a procurement spend category is merged with the classified supplier data.
- **Step 10:** Excludes the following data – un-addressable spend i.e. not within procurement scope; spend associated with unclassified suppliers and interagency spend.
- **Step 11:** Generates the category, sector and supplier classification views of the data contained in Sections 2 of this report.

## Tendering Data Analysis Methodology

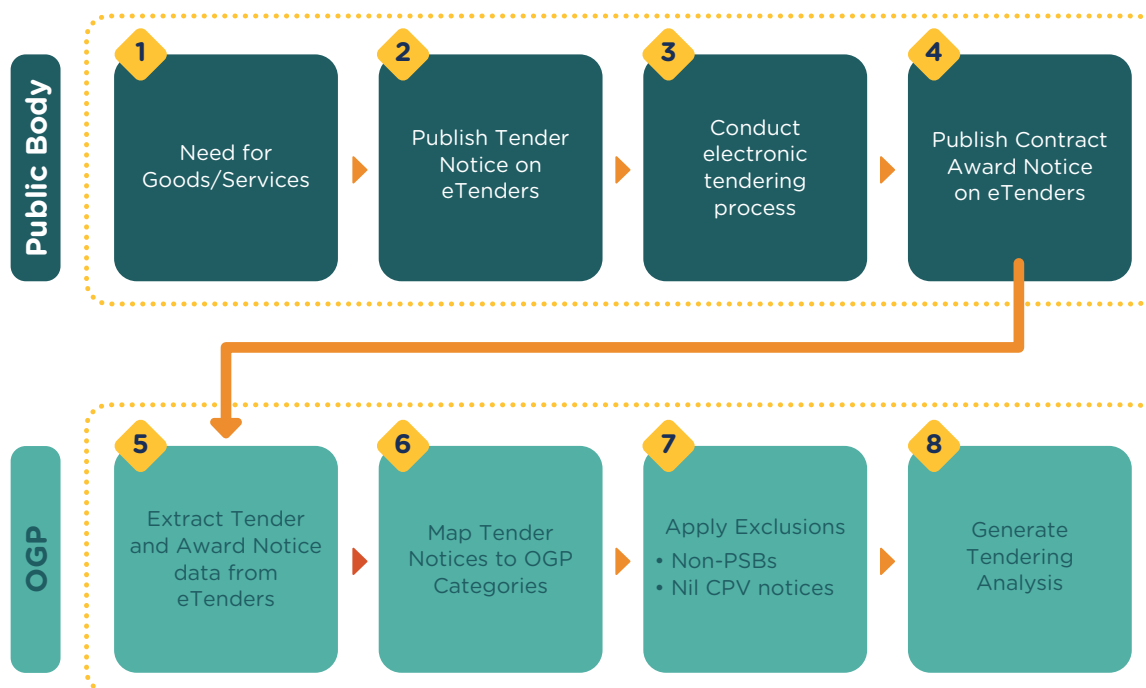


Figure B: Overview of Tender Data Analysis Methodology

- **Steps 1 to 4:** are conducted by public bodies (including commercial semi-state companies) for the publication, processing and awarding of tenders. It should be noted that the majority of the tender and contract award notices were entered on eTenders by end-users in the public bodies. The resulting tendering analysis is therefore dependent on the accuracy of the information entered.
- **Step 5:** involves the periodic extraction of the tendering data from the eTenders system. Where abnormally large tender values (e.g. for several billion) have been entered these are treated as an error in data entry and classified as 'outliers' and removed from the dataset for analysis.
- **Step 6:** is the mapping of Tender Notices to the procurement spend categories using Common Procurement Vocabulary codes (CPV). The most prevalent matching CPV code contained in each tender notice is used as the basis for selection of the procurement spend category. The category mapped to the tender notice is also applied to the associated contract award notices.
- **Step 7:** is the stage where exclusions are applied. These exclusions include tender notices with no CPV code and notices published by Non-PSB Organisations.
- **Step 8:** generates the OJEU and category views of the tender and award notice data contained in this report.

Spend Category	2017						2018						2019					
	Volume of Tender Notices			Estimated Value of Tender Notices			Volume of Tender Notices			Estimated Value of Tender Notices			Volume of Tender Notices			Estimated Value of Tender Notices		
	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)
Construction and Civils Works	1,240	28%	2,593	42%	2.09	0.10	1,295	29%	5,335	42%	4.12	0.14	1,552	31%	3,510	46.4%	2.26	0.14
Professional Services	617	14%	566	9%	0.92	0.07	641	15%	1,291	10%	2.01	0.08	801	16%	992	13.1%	1.24	0.13
Fleet / Plant	329	8%	188	3%	0.57	0.10	381	9%	180	1%	0.47	0.08	374	7.5%	654	8.7%	1.75	0.10
Managed Services	432	10%	347	6%	0.80	0.08	395	9%	443	4%	1.12	0.10	415	8.3%	590	7.8%	1.42	0.10
Facilities Management, Maintenance	444	10%	230	4%	0.52	0.07	394	9%	203	2%	0.51	0.07	461	9.2%	577	7.6%	1.25	0.10
Information and Communication Technology, and Office Equipment	570	13%	650	11%	1.14	0.09	528	12%	436	3%	1.12	0.10	553	11.1%	467	6.2%	0.85	0.10
Medical and Diagnostic Equipment and Supplies	110	3%	159	3%	1.45	0.06	79	2%	94	1%	1.20	0.06	109	2.2%	232	3.1%	2.13	0.06
Uncategorised Spend	20	0%	89	1%	4.47	0.12	63	1%	332	3%	5.27	0.07	21	0.4%	149	1.7%	7.08	0.25
Travel and HR Services	202	5%	797	13%	3.94	0.08	231	5%	133	1%	0.57	0.08	257	5.1%	122	1.6%	0.47	0.10
Medical Professional Services	70	2%	104	2%	1.49	0.08	63	1%	72	1%	1.15	0.10	73	1.5%	116	1.5%	1.59	0.12
Laboratory, Diagnostics and Equipment	164	4%	104	2%	0.64	0.09	143	3%	662	5.3%	4.63	0.05	143	2.9%	40	0.5%	0.28	0.10
Marketing, Print and Stationery	36	1%	22	0%	0.61	0.08	44	1%	17	0.1%	0.39	0.09	46	0.9%	36	0.5%	0.79	0.10
Defence	30	1%	37	1%	1.24	0.06	57	1%	10	0.1%	0.18	0.06	58	1.2%	33	0.4%	0.57	0.08
Medical, Surgical and Pharmaceutical Supplies	23	1%	44	1%	1.92	0.23	17	0.4%	53	0.4%	3.12	0.09	34	0.7%	23	0.3%	0.68	0.15
Veterinary & Farming	88	2%	25	0%	0.29	0.08	68	2%	10	0.1%	0.14	0.05	89	1.8%	14	0.2%	0.02	0.06
Utilities	12	0%	201	3%	16.72	0.05	12	0.3%	3,325	26.4%	277.06	1.59	16	0.3%	5	0.1%	0.33	0.10
Plant Hire	1	0%	0	0%	0.40	0.40	2	0.1%	0	0%	0.20	0.20	2	0.0%	0	0.0%	0.15	0.15
<b>Grand Total</b>	<b>4,388</b>	<b>100%</b>	<b>6,157</b>	<b>100%</b>	<b>1.38</b>	<b>0.08</b>	<b>4,413</b>	<b>100%</b>	<b>12,598</b>	<b>100%</b>	<b>2.85</b>	<b>0.10</b>	<b>5,004</b>	<b>100%</b>	<b>7,560</b>	<b>100%</b>	<b>1.51</b>	<b>0.11</b>

Landscape 1 Table 3.3: Tender Notices by Category 2017 - 2019

Note: Portrait Version of Table 3.3 available on page 36

Spend Category	2017				2018				2019			
	Volume of Tender Notices		Estimated Value of Tender Notices		Volume of Tender Notices		Estimated Value of Tender Notices		Volume of Tender Notices		Estimated Value of Tender Notices	
	Volume	Total (£m)	Average (£m)	Median (£m)	Volume	Total (£m)	Average (£m)	Median (£m)	Volume	Total (£m)	Average (£m)	Median (£m)
Information and Communication Technology, and Office Equipment	174	84.15	0.48	0.10	162	81.24	0.50	0.10	185	226.83	1.23	0.14
Construction and Civils Works	141	689.91	4.89	0.12	228	221.99	0.97	0.12	222	143.78	0.65	0.12
Professional Services	135	154.28	1.14	0.07	152	95.73	0.63	0.07	182	128.40	0.71	0.12
Managed Services	131	63.36	0.48	0.09	135	203.79	1.51	0.14	131	113.53	0.87	0.12
Facilities Management, Maintenance	105	77.31	0.74	0.09	102	63.98	0.63	0.07	134	87.83	0.66	0.10
Fleet / Plant	92	42.39	0.46	0.14	108	31.32	0.29	0.12	125	81.94	0.66	0.12
Travel and HR Services	48	27.67	0.58	0.15	53	23.45	0.44	0.06	67	64.20	0.96	0.14
Medical Professional Services	25	21.00	0.84	0.08	13	7.50	0.58	0.10	11	52.41	4.76	0.18
Uncategorised Spend	5	55.02	11.00	1.11	10	193.86	19.39	0.07	10	41.68	4.17	0.37
Marketing, Print and Stationery	12	11.57	0.96	0.10	17	11.52	0.68	0.10	21	20.46	0.97	0.10
Medical, Surgical and Pharmaceutical Supplies	9	17.55	1.95	0.06	7	2.51	0.36	0.15	11	10.26	0.93	0.15
Laboratory, Diagnostics and Equipment	72	28.28	0.39	0.10	48	14.19	0.30	0.06	54	9.83	0.18	0.11
Medical and Diagnostic Equipment and Supplies	27	12.27	0.45	0.08	9	24.10	2.68	0.20	21	3.44	0.16	0.07
Defence	14	1.93	0.14	0.06	25	7.67	0.31	0.10	16	3.40	0.21	0.10
Veterinary & Farming	34	5.14	0.15	0.09	16	1.99	0.12	0.07	20	2.84	0.14	0.10
Utilities	8	200.63	25.08	0.11	4	5.63	1.41	1.05	3	0.19	0.06	0.01
Plant Hire	0	0.00	0.00	0.00	1	0.29	0.29	0.29	1	0.12	0.12	0.12
<b>Grand Total</b>	<b>1,032</b>	<b>1,492</b>	<b>1.45</b>	<b>0.10</b>	<b>1,090</b>	<b>990.76</b>	<b>0.91</b>	<b>0.10</b>	<b>1,214</b>	<b>991.13</b>	<b>0.82</b>	<b>0.12</b>

Landscape 2 Table 3.6: In-Year Awards by Category 2016 - 2018

Note: Portrait Version of Table 3.6 available on page 40

## Notes

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## **Disclaimer:**

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