

2025

Cross-Border Procurement Gap

Competition, SME participation and the operating friction that keeps capable suppliers out.

REPORT THESIS

The open space is not generic proposal writing. It is cross-border qualification: turning fragmented notices, local requirements and supplier proof into a reliable go or no-go decision.

The access gap in one view

871,149

**2025 TED PUBLICATION
RECORDS**

All publication record types; not unique tenders.

438,059

**COMPETITION-FORM
RECORDS**

Narrower call-for-competition workflow input.

71%

SME AWARDS BY COUNT

Share of contracts awarded to SMEs in the evaluation evidence.

55%

SME AWARDS BY VALUE

SME share is lower when measured by contract value.

2%

**DIRECT CROSS-BORDER BY
COUNT**

Supplier located in another Member State.

4%

**DIRECT CROSS-BORDER BY
VALUE**

Direct cross-border remains a small value share.

SMEs are present in public procurement, but value concentration and low direct cross-border participation show that market access is not solved by publication alone. Supplier readiness, qualification cost and local delivery capacity still determine who can compete.

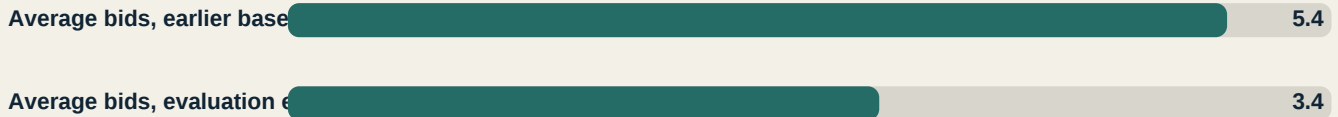
Gap statement

A tender can be legally open and operationally inaccessible. BidCarta targets the distance between publication and a supplier's ability to qualify, prove capability and submit on time.

Competition is thinner than it looks

EUROPEAN EVIDENCE

More records do not automatically create more bidders.



The Commission's 2025 evaluation reports a fall in average bids from 5.4 to 3.4 over the assessed period. The European Court of Auditors had already found that over 40% of 2021 awards involved only one bidder and direct cross-border procurement remained around 5% in its measure.

~42%

SINGLE-BID AWARDS

ECA 2021 endpoint; not a 2025 annual rate.

~16%

DIRECT AWARDS

ECA 2021 endpoint across assessed procedures.

~3.4

AVERAGE BIDS

Commission evaluation evidence.

Interpretation

Competition indicators use defined subsets of notices and procedures. They should guide segment selection and product design, not be treated as the win rate of any individual supplier.

The supplier friction stack

AVERAGE PREPARATION BURDEN

A bid consumes roughly 11 person-days before delivery work begins.

The 2025 Commission evaluation estimates an average burden of about 11 person-days per bid. For a small supplier, that cost competes directly with sales, delivery and customer support.

Friction	What the supplier experiences	Automation target
Discovery	Many portals, CPV noise, language and duplicate notices.	Federated ingestion, normalization and ranking.
Eligibility	Thresholds, exclusions, turnover, references and local registers.	Requirement extraction and pass/fail gates.
Evidence	Certificates and project proof stored across files and inboxes.	Versioned evidence vault with expiry dates.
Authoring	Repeated company narrative and requirement mapping.	Evidence-grounded response blocks and traceability.
Partners	Local delivery or specialist capacity is absent.	Partner-gap detection and consent-based introductions.
Submission	Portal accounts, formats, signatures and deadline sequencing.	Checklist, ownership and human approval.

Cross-border needs a trust layer

2%

DIRECT: CONTRACT COUNT

Commission evaluation measure.

4%

DIRECT: CONTRACT VALUE

Commission evaluation measure.

~20%

INDIRECT CROSS-BORDER

Domestic entity with foreign ownership or supply links.

WHAT CHANGES THE CONVERSION RATE

- Translate requirements, not just prose: dates, currencies, thresholds, evidence and delivery conditions remain structured.
- Map local proof requirements to equivalent documents using eCertis and country rules.
- Identify where a local subcontractor, licence, site presence or language capacity is commercially necessary.
- Show buyers and partners a concise evidence pack instead of an unstructured company profile.
- Record explicit supplier approval before any outreach, commitment or submission action.

Wedge

Start with sectors where proof is repeatable across opportunities: digital services, facilities, energy services, training, specialist equipment and professional services.

The 2025 product thesis

NARROW PROMISE

BidCarta makes one decision easier: should this company pursue this opportunity?

The first paid deliverable is a bid readiness review produced within a fixed service window. It combines opportunity fit, eligibility, evidence coverage, commercial attractiveness, partner needs and an action plan.

Output	Buyer value	Success measure
Qualified shortlist	Less time spent on irrelevant alerts.	Accepted opportunities / reviewed opportunities.
Bid/no-bid memo	A consistent decision before sunk cost.	Decision turnaround and later outcome.
Evidence matrix	Lower repetition and fewer compliance failures.	Requirement coverage before authoring.
Partner brief	A clear, consent-based request for local capacity.	Relevant partner responses and fit.
Submission pack	One controlled source of documents and tasks.	On-time, compliant submission rate.

Commercial model

Charge for readiness and delivery work first. Introduce success-linked pricing only where local law, tender rules and the client contract permit it.

Method and sources

This report uses the 2025 evaluation of the EU public procurement directives, TED record analysis and earlier competition evidence for trend context. Date labels are stated beside each statistic so that endpoints are not presented as same-year measures.

PRIMARY SOURCES AND DATA NOTES

European Commission - Evaluation of EU public procurement directives

https://single-market-economy.ec.europa.eu/news/commission-publishes-evaluation-eu-public-procurement-directives-2025-10-14_en

European Court of Auditors - Special Report 28/2023

https://www.eca.europa.eu/ECAPublications/SR-2023-28/SR-2023-28_EN.pdf

TED Search API documentation

<https://docs.ted.europa.eu/api/latest/search.html>

European Commission - National public procurement portals directory

https://commission.europa.eu/funding-and-tenders/tools-public-buyers/public-procurement-eu-countries_en

European Commission - Single Market Scoreboard

https://single-market-scoreboard.ec.europa.eu/node/264_en

Record definition

The 871,149 and 438,059 figures are publication-record counts for 2025. They do not represent unique tenders, unique contracts or awards.