

2024

European Tender Market Baseline

A decision-grade view of market scale, publication coverage and the supplier access layer.

REPORT THESIS

The commercial opportunity is not a single database. It is the intelligence layer that connects EU-wide notices, national portals, supplier evidence and a defensible bid decision.

One market. Four different measures.

Public procurement figures answer different questions. Treating them as interchangeable inflates opportunity estimates and weakens sales decisions. BidCarta separates economic scale from discoverable records.

~EUR 2.5tn

TOTAL EU PROCUREMENT

All public purchasing; current Commission scale estimate.

~15%

SHARE OF EU GDP

Macro-economic scale, not a searchable deal pipeline.

~EUR 815bn

TED OPPORTUNITY VALUE

Annual value represented in TED opportunity publication.

~EUR 616bn

**DIRECTIVES-SCOPE
AVERAGE**

Average annual procurement covered by EU directives.

801,444

2024 PUBLICATION RECORDS

All TED publication records in the calendar year.

409,817

**COMPETITION-FORM
RECORDS**

Call-for-competition form records; not unique tenders.

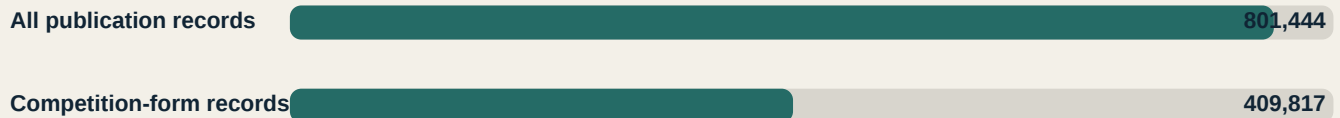
Decision rule

Use total procurement to size the economy, TED value to size the discoverable above-threshold layer, and publication records to size operational processing load. Never multiply record counts by average contract values.

The 2024 publication baseline

TED RECORDS

Operational volume is high enough for automation to be essential.



A publication record is a notice-level event in TED. A procurement procedure can generate several records over time: prior information, competition, correction, award and modification. The 409,817 competition-form records are a narrower workflow input, but still not a count of unique procedures.

Why this matters

An opportunity engine should cluster related notices by procedure, lot, buyer and chronology before ranking. Raw record counts are useful for ingestion capacity, not revenue forecasts.

2024 DATA ARCHITECTURE

- eForms became the operating standard for new TED notices, improving structure and machine readability.
- The Public Procurement Data Space launched in September 2024 to connect EU and national procurement data.
- The Single Market Scoreboard notes limited comparability effects during the 2023-2024 eForms transition.

The scope and coverage gap

DIRECTIVE SCOPE AND THE WIDER ECONOMY

TED is the backbone, not the entire procurement economy.

EU law requires qualifying notices above applicable thresholds to be published in TED. Directive-scope procurement averages about EUR 616 billion per year - roughly one quarter of the current EUR 2.5 trillion total scale estimate. The remaining economic value is not synonymous with unpublished procurement: national and local rules can require publication through other channels.

~25%

DIRECTIVES-SCOPE LAYER

Approximate ratio of EUR 616bn average to EUR 2.5tn total.

~75%

OUTSIDE THAT PERIMETER

Approximate remainder; not a measure of unpublished spend.

250k+

PUBLIC AUTHORITIES

A highly distributed buyer universe across Europe.

COMMERCIAL IMPLICATION

- The winning product is a federated monitor, not a TED-only alert service.
- Country-level connectors need source-specific field mapping, language handling and duplicate control.
- Supplier evidence must be reusable across jurisdictions while preserving each tender's exact requirements.
- Opportunity scoring should consider fit, evidence readiness, delivery geography, timing and partner gaps.

Source coverage blueprint

A credible European tender office starts with official channels and expands in controlled layers. Aggregators can improve discovery, but the official notice remains the authority for deadlines and documents.

Layer	Primary channels	BidCarta use
EU-wide	TED; EU Funding & Tenders Portal	Above-threshold notices, EU institution procurement, structured identifiers.
National	Country portals listed by the European Commission	Below-threshold notices, local attachments, buyer-specific publication.
Award intelligence	TED award and modification records	Incumbent mapping, cycle timing, buyer and supplier history.
Evidence	eCertis; national registers; supplier vault	Qualification documents, declarations, certificates and reusable proof.
Relationship	Buyer pages; prior information notices	Early signal, procurement plans and clarification windows.

Operating standard

Every surfaced opportunity must retain its official source URL, publication number, deadline, buyer, lots, CPV codes, language and latest correction state.

What the baseline supports

FROM DATA TO A PAID SERVICE

The initial product can be service-led and software-enabled.

- Daily shortlist: a small number of relevant opportunities with a clear fit explanation.
- Bid/no-bid memo: commercial value, eligibility, evidence readiness, delivery risk and recommended action.
- Evidence matrix: each requirement connected to an owned document, responsible party and status.
- Partner gap: capabilities that require a subcontractor or consortium member.
- Submission control: deadline, required formats, portal steps and approval checkpoints.

Signal

DISCOVERY PRODUCT

Ranked opportunities instead of broad alerts.

Proof

READINESS PRODUCT

Evidence reuse and requirement traceability.

Action

DELIVERY PRODUCT

Authoring workflow with operator approval.

Positioning

BidCarta is a procurement intelligence and bid operations company. It does not replace legal advice, the contracting authority's instructions or the authorised supplier decision-maker.

Method and sources

This retrospective baseline combines European Commission market-scale estimates with TED publication-record analysis. The values describe different perimeters. The publication record counts were extracted for the stated calendar period using TED Search API categories and are presented as records, not unique tenders or contract awards.

PRIMARY SOURCES AND DATA NOTES

European Commission - Public procurement overview

https://single-market-economy.ec.europa.eu/single-market/public-procurement_en

European Commission - Public Procurement Data Space

https://single-market-economy.ec.europa.eu/single-market/public-procurement/digital-procurement/public-procurement-data-space-ppds_en

TED - European public procurement overview

<https://ted.europa.eu/en/simap/european-public-procurement>

TED Search API documentation

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

European Commission - Single Market Scoreboard, access to public procurement

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

Publication basis

Published in August 2026 as a retrospective 2024 market baseline. Monetary figures are rounded and should be read with the scope labels shown throughout the report.