

2026 YTD

European Tender Opportunity Pulse

Publication velocity, current thresholds and the operating signals shaping supplier access.

REPORT THESIS

The 2026 opportunity is an always-on operating system: ingest every day, detect changes, rank by proof readiness and route only the strongest opportunities to an authorised decision-maker.

2026 year-to-date pulse

581,184

PUBLICATION RECORDS

1 January-23 August 2026; all TED record types.

284,805

COMPETITION-FORM RECORDS

YTD call-for-competition form records.

>3,000

DAILY PUBLICATIONS

TED notices, results and related announcements per working day.

~EUR 815bn

ANNUAL TED OPPORTUNITY VALUE

Scale measure, not a 2026 YTD awarded total.

~EUR 616bn

DIRECTIVES-SCOPE AVERAGE

Average annual procurement in directive scope.

23 AUG

DATA CUT-OFF

The year is incomplete by design.

Reading the pulse

The 2026 figures are year-to-date publication records. Annual TED value and directives-scope averages are separate structural measures shown only for context.

Publication velocity

COMPARABLE RECORD SERIES

The operational load continues to grow.



The 2026 bars are not annualized. They show the volume already processed by the source system at the stated cut-off. A production monitor must also absorb corrections, awards and modification records that change the commercial meaning of an opportunity.

2026-2027 thresholds

EU procurement thresholds define when directive rules and TED publication obligations generally apply. The correct threshold also depends on buyer type, contract category and specific legal regime.

EUR 140k

CENTRAL GOVERNMENT

Supplies and services.

EUR 216k

SUB-CENTRAL

Supplies and services.

EUR 432k

UTILITIES

Supplies and services.

EUR 5.404m

WORKS

Public works threshold.

PRODUCT CONSEQUENCE

- A TED-only monitor is strongest above the applicable thresholds.
- National connectors are required for lower-value opportunity coverage.
- Threshold metadata should be stored with buyer type, contract type and jurisdiction.
- The official notice and procurement documents control the opportunity workflow.

The 2026 operating landscape

POLICY AND INFRASTRUCTURE

Data is becoming more structured while the market remains fragmented.

Signal	2026 meaning	BidCarta response
eForms	Structured notice fields support machine processing.	Normalize into a canonical opportunity schema.
PPDS	EU and national data connection is a policy priority.	Design connectors and provenance from day one.
Directive review	Simplification, competitiveness and resilience are active priorities.	Track policy changes and sector eligibility.
Strategic procurement	Quality, sustainability and resilience matter alongside price.	Tag proof against non-price criteria.
AI adoption	Extraction and authoring can accelerate; accountability remains human.	Evidence-grounded agents with approval gates.

Moat

The defensible asset is not a generic language model. It is the linked graph of notices, requirements, supplier proof, buyer history, partners and observed outcomes.

Where to focus first

SEGMENT DESIGN

Choose repeatable evidence before the largest contract value.

Segment	Why it fits an operator-light launch	Primary filter
Digital services	Repeatable references, team CVs and delivery methods.	CPV + geography + framework access.
Facilities and energy	Recurring tenders and local partner potential.	Site footprint + certificates + partner gap.
Training services	Clear capability proof and multilingual delivery options.	Topic + language + reference threshold.
Specialist equipment	Product evidence is reusable across buyers.	Technical compliance + distribution rights.
Professional services	Structured team and project evidence.	Expert criteria + turnover + conflict checks.

Exclusion principle

Avoid early segments with heavy physical mobilization, unclear licensing, weak evidence reuse or long qualification cycles unless a committed partner already exists.



Daily decision loop

OPERATOR WORKFLOW

Automate repetition. Preserve authority.

Time	Agent action	Control point
06:00	Pull new, amended and awarded records from selected sources.	Connector health and source timestamp.
06:15	Normalize buyer, CPV, lots, deadlines, values and documents.	Schema and duplicate checks.
06:30	Match against supplier capabilities and evidence readiness.	Hard eligibility gates before score.
07:00	Generate the top opportunity memo and evidence-gap list.	Every claim linked to source evidence.
09:00	Founder or authorised client reviews go/no-go recommendations.	Explicit approval recorded.
After go	Create requirement matrix, task plan and response blocks.	Submission remains an authorised human act.

Service promise

A small, defensible shortlist delivered consistently is more valuable than a large alert feed. Precision is the first product metric.

Method and sources

The 2026 pulse is explicitly year-to-date. TED record counts cover 1 January through 23 August 2026 and are not annualized. Market value, directive-scope averages and thresholds are separately labelled because they describe different legal and economic perimeters.

PRIMARY SOURCES AND DATA NOTES

European Commission - 2026 Annual Single Market and Competitiveness Report

https://single-market-economy.ec.europa.eu/publications/2026-annual-single-market-and-competitiveness-report_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 - Public procurement thresholds

https://single-market-economy.ec.europa.eu/single-market/public-procurement/legal-rules-and-implementation/thresholds_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

European Commission - National public procurement portals directory

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

Data definition

Publication records include multiple notice stages and are not unique tenders. Competition-form records are a narrower processing category and are also not unique tender counts.