Study on e-Procurement Measurement and Benchmarking MARKT 2011/097/C

Lot 1 — Public Procurement Performance Indicators

D2 e-Procurement State of Play Report

June 17, 2013

The opinions expressed in this study are those of the authors and do not necessarily reflect the views of the European Commission

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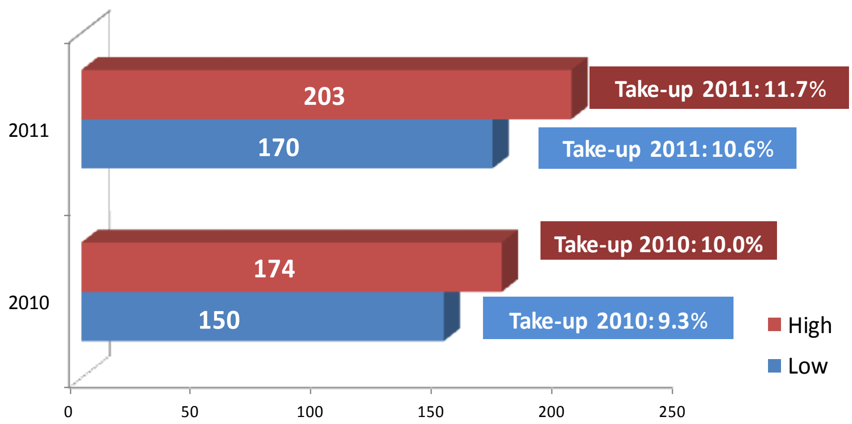
EXECUTIVE SUMMARY

Overview

This is the e-Procurement State of Play Report (D2) of the Study on e-Procurement Measurement and Benchmarking, Lot 1, entrusted by the European Commission, DG MARKT, to IDC and Capgemini Consulting. The main goal of this report is to provide an overview of the level of development of e-Procurement across the EU and in the Member States (MS), focusing on the estimate of the current take-up in volume and value. This deliverable builds on the results of D1 "Mapping the e-Procurement Landscape in the EU", as well as on the EU27 country profiles validated by national governments. This report is also coherent with the principles and definitions of the measurement system described in D3 "Performance Indicators Report".

According to our research, the overall value of e-Procurement in the EU in 2011 is estimated between **€170 billion (low range estimate) to €203 billion (high range estimate)**, corresponding to a level of take-up between 10.6% and 11.7%. This corresponds to the aggregation of the value of e-Procurement for 24 Member States, including 5 Member States where this value is zero, since e-Submission for public procurement was not yet available in 2010–2011 (they are Bulgaria, Greece, Luxemburg, Hungary and Slovenia). The estimate excludes 3 Member States (the Netherlands, Slovakia and Latvia) for which we were unable to collect sufficient data. In 2010, the overall value of e-Procurement was between €150 billion and €174 billion, with take-up between 9.3% and 10%.

Estimate of Take-Up of e-Procurement in the EU, 2010–2011: High-Low Range (€B)



Source: IDC, 2013

The growth rate of the value of e-Procurement from 2010 to 2011 (low range estimate) was approximately 13.4%. As a percentage ratio of e-Procurement over total public procurement, the growth of the indicator is slightly higher (13.7%), because the value of public procurement declined slightly in 2011 compared to 2010. The economic crisis does not seem to have accelerated the adoption of e-Procurement as much as could have been expected, given its potential benefits in efficiency and control of public spending. Since e-Procurement is still marginal (under 10% of public spend in most countries), the tendering of a few large public contracts and other contingency factors are sufficient to push up or down the level of take-up in single countries from one year to another.

Methodology and Validation

This estimate was calculated country by country, with a pragmatic methodological approach based on interviews and data collection. The estimates were crosschecked with government representatives and/or key contacts in each MS, resulting in a final feedback and validation process. The report highlights the data sources and level of reliability of each country estimate. 10 MS representatives validated our estimates (Cyprus, Czech Republic, Estonia, France, Ireland, Lithuania, Malta, Portugal, Romania and Sweden). In 5 MS (Austria, Denmark, Finland, Germany and Italy), national contacts felt unable to validate our estimates for lack of official data, but they considered the estimates reasonable. In 4 MS the national representatives did not answer our request for feedback, but the estimates are based on public sources and local experts' knowledge (Belgium, Poland, Spain and the UK). Overall, we are fairly confident with the reliability of our estimates.

The take-up percentage is calculated as follows:

- The numerator is the absolute value of the public contracts awarded in the calendar year, which have been processed in each MS with pre-award e-Procurement, up to and including at least e-Submission. The value of contracts processed with e-Auctions, e-Ordering, e-Marketplaces, e-Catalogues and DPS is also included, where these services were used.
- The denominator is the value provided by Eurostat of general government procurement by country, excluding utilities spending, and including central, local and state government spending, and social security funds.

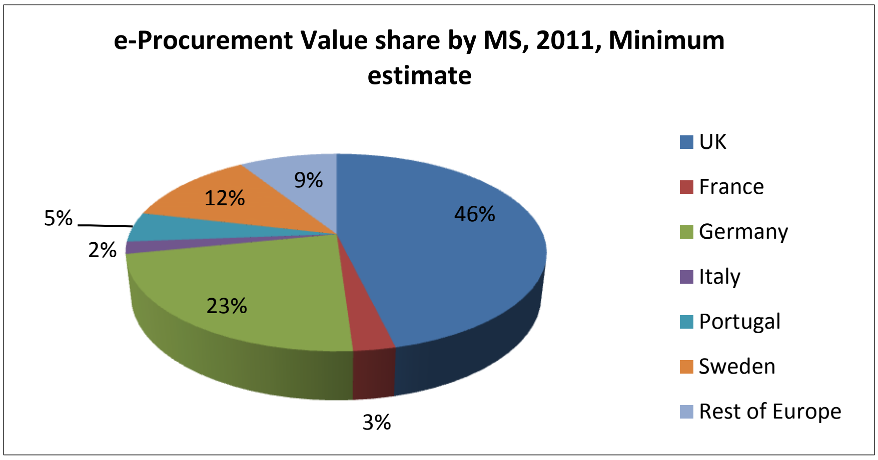
Eurostat is the only source providing comparable data on public procurement at EU level. However, it is a much larger aggregate than that usually considered by governments when calculating government spending. Therefore the take-up percentage is a little lower than it could be, if we had a more accurate estimate of public procurement spending. We have included in the report national take-up estimates where available (Portugal, for example).

The low range estimate represents the minimum value of e-Procurement by country, which we were able to ascertain based on existing sources. To calculate the high range estimate, we increased the estimated level of take-up in the MS where we were unable to survey all of the existing platforms. This exercise corresponds to a "sensitivity analysis" approach, where we pushed the boundaries of estimates to the maximum possible level of take-up, taking into account the national context. Nevertheless, the final result for the high range estimate is only approximately 1% higher than the low range estimate. In other words, the sensitivity analysis seems to confirm that the potential margin of error of this take-up estimate is not large.

Given the current landscape of e-Procurement development and monitoring, we believe that our estimate is the best possible effort available today. Unfortunately, the lack of comparable data means that we were unable to calculate any of the other indicators we were aiming for, such as e-Procurement take-up by SMEs and/or cross-border suppliers. The report presents some data collected at country level on these aspects.

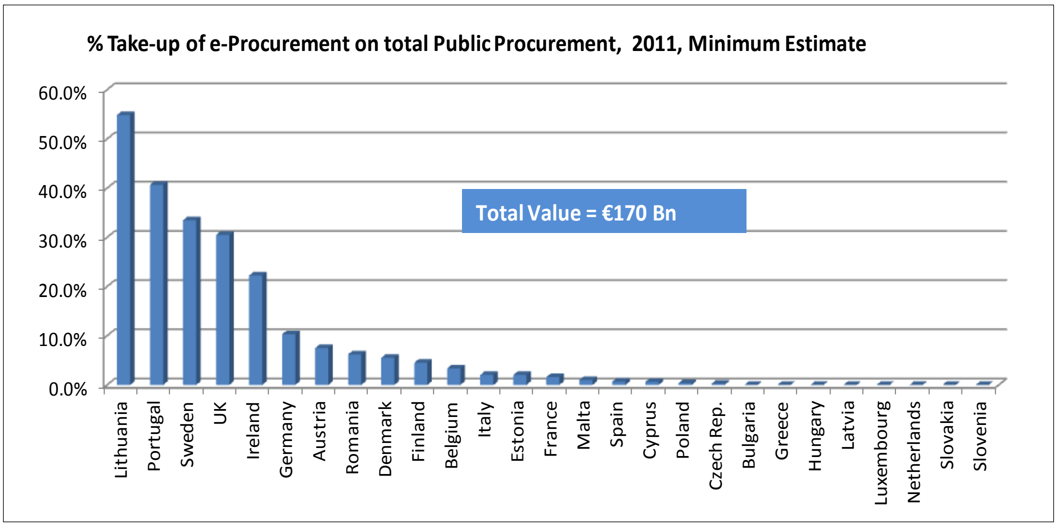
Ranking of the MS by Intensity of Take-Up

The UK alone represents 46% of the total estimated value of e-Procurement in Europe in 2011 (low range estimate), followed by Germany (23%) and Sweden (12%). Portugal accounts for 5% of the total value of e-Procurement in the EU, even if its economy is much smaller than those of France or Italy, for example.



Source: IDC 2013

The ranking in terms of intensity of e-Procurement take-up helps to explain these differences (figure below). Three small countries — Lithuania, Portugal and Sweden — come first, with take-up over 30%, closely followed by the UK. Ireland follows, with an estimate of over 22% take-up.



Source: IDC 2013

Lithuania and Portugal have successfully anticipated the mandatory adoption of e-Procurement for all Contracting Authorities since 2009 (but in Lithuania, the obligation only concerns 50% of yearly spending per Authority, while in Portugal the obligations are more extended and articulated). Sweden and the UK follow a different model, with open markets where the adoption of e-Procurement is enabled by several competitive private platforms. Ireland is a hybrid model: the use of the national public platform is voluntary, but strongly recommended by a mix of regulation, incentives and efficient services. The majority of the other MS have a take-up below 10%, with a long tail of countries with minimal or no e-Procurement at all.

In conclusion, the diffusion of e-Procurement is a complex transition, which requires the active cooperation of all stakeholders: policy makers and Contracting Authorities actively pushing for e-Procurement, a well-developed, user-friendly e-Procurement technical infrastructure, economic operators willing to collaborate, and a favourable regulatory environment. As proved by the UK, Swedish or Irish approaches, user-friendly systems tailored to the needs of Contracting Authorities and companies are a very effective way of increasing e-Procurement take-up.

1. INTRODUCTION

1.1. Background

The main goal of this report is to provide an overview of the level of development of the e-Procurement marketplace across the EU and in the Member States, focusing on the estimate of the current take-up in volume and value.

The deliverable is without prejudice to the offer made by IDC and Capgemini Consulting for this project. The document may be updated at the request of the Commission to ensure that the objectives of the study are achieved, within the limits established by the contract.

The main goal of this project is to design, set up and test a systematic and comparable monitoring capacity of the e-Procurement infrastructure and performance across Europe. The project includes two main workstreams:

1. Mapping and measuring the e-Procurement landscape in Europe
2. Designing, testing and recommending a set of e-Procurement performance indicators for a pan-European performance measurement system

This deliverable completes the achievement of the objectives of workstream 1, building on the results of D1 "Mapping the e-Procurement Landscape in the EU" and specifically on the taxonomy and census of e-Procurement entities, as well as on the detailed country profiles of the EU27, as validated by national governments. This report is also coherent with the principles and definitions of the measurement system described in D3 "Performance Indicators Report".

The report is structured as follows:

- Chapter 1 presents the main objectives of the report and the main definitions used in the study
- Chapter 2 presents the methodological approach and the data collection
- Chapter 3 presents the description of the state of play, country by country
- Chapter 4 presents final considerations about:
    - The level of take-up and the various development models of e-Procurement across the EU27, as well as the perspectives of evolution
    - The main challenges and shortcomings of assessing the measurement of take-up in the EU

The annexes present:

- The glossary of the main terms used in the report
- The value questionnaire survey process and template

1.2. Key Concepts and Framework of Analysis

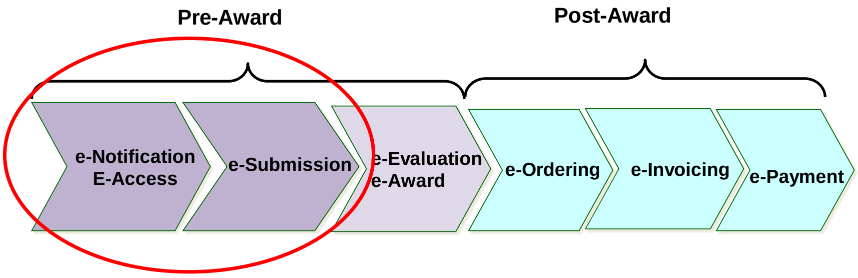
This study is based on the following definitions:

Within the scope of this study, we define electronic procurement as follows:

E-Procurement refers to the use of electronic communications and transaction processing by government institutions and other public sector organisations when buying supplies and services or tendering public works. This includes the replacement of paper-based procedures through the procurement chain.

The procurement process covers two main phases (Figure 1): the pre-award phase and the post-award phase. Pre-award comprises all the sub-phases of procurement until the award of the contract (publication of notices, access to tender documents, submission of bids, evaluation of the proposals and the award of the contract). Post-award comprises all the sub-phases of procurement after the award of the contract (ordering, invoicing and payment). The switch over from traditional, paper-based processes to electronic processes may be end-to-end, or limited to some phases of the process.

Figure 1 The e-Procurement Process Phases: Pre- and Post-Award



Source: IDC, 2012

Within the framework of this study, and in agreement with the EC Green Paper on e-Procurement, we will define as the minimum package for an e-Procurement offering the electronic provision of the following services:

- e-Notification: online publication of tender notices
- e-Access: online access to tender documents 24/7 in an automatic manner
- e-Submission: online submission of tenders

Since the majority of procurement contracts are processed through a mix of online and offline phases, we will use the same definition as a threshold for the identification and measurement of contracts processed online.

The definition of e-Procurement take-up is as follows:

The take-up of e-Procurement is measured as the number and value of public procurement contracts that have been processed electronically, as a minimum up to and including at least e-Submission, as a proportion of the total public procurement contracts processed in the same period. This includes all procurement contracts, above and below the EU threshold.

In this report, we have included in the estimate of take-up also the implementation of e-Auctions (since they require the submission of electronic quotations) and the use of e-Ordering and e-Catalogues when implementing framework contracts. When available and used, we included data on DPS. The total estimate also includes of course the end-to-end electronic processing of contracts, when this is done: our definition designs the minimum boundaries of e-Procurement use.

2. THE TAKE-UP OF E-PROCUREMENT IN THE EU

2.1. Overview

This chapter presents the methodological approach used to estimate the level of e-Procurement take-up in value in 2010–2011 at the EU and MS level and the results of this process.

2.2. Methodology of Take-Up Estimates

Estimating the e-Procurement take-up for the EU27 is extremely challenging because of a number of reasons:

- As shown in the D1 report "e-Procurement Landscape", each Member States has developed e-Procurement through its own specific approach and path, and each country is progressing in a different way and with a different speed towards the adoption of e-Procurement.
- The collaboration with the panel of e-Procurement platforms showed that there are 3 separate problems with the availability of data:
  - Platforms do not have visibility on the value of contracts (if the pre-award technical process is limited to send tenders as PDF attachments, or to exchanges of emails, the data on value is not automatically uploaded in the system: this was the case in Germany's eVergabe and in Poland's national platform).
  - The data is available but platforms do not collect the data (this is the case with many national platforms, such as in France).
  - The data is available and collected, but the platform's operator is not authorised to communicate it to the benchmarking organisation (this is most often the case with private operators such as Bravosolution).

These circumstances apply to the majority of platforms identified by the study team in the census, as will be shown in the country profiles. Therefore, the study team was unable to apply the methodology initially designed: that is, collecting value data from a sample of platforms statistically representative at the EU level and extrapolating the results.

Since we were unable to build a quantitative model of take-up for all the EU27, the only possible alternative was to carry out separate estimates for each MS, based on the little available data we could collect and on the qualitative information gathered with the surveys developed within this study. Nevertheless, although the estimates were conducted country by country, we built and followed, at country level, a common pragmatic procedure following these steps:

- **Data collection**
  - Collection and analysis of all the available data from public sources: this includes Eurostat, national monitoring reports, and interviews with national and regional stakeholders. This included specific in-depth

research in Italy, Germany and the UK, as well as dedicated interviews in Spain and Poland to cover the largest MS.

  - Ad hoc survey of the 36 e-Procurement platforms identified in the census as collecting data about e-Procurement take-up, based on direct interviews and a structured questionnaire, complementing the data already collected in the census.

- **Elaboration of the estimates**
  - Development of assumptions about e-Procurement growth trends, country by country, based on the qualitative knowledge of the development of public spending and e-Procurement dynamics in each MS.
  - Estimates of e-Procurement value and take-up for each MS: it builds on the collected data and adding correction parameters if necessary to solve inconsistencies, with a conservative approach.
- **Validation and fine-tuning of estimates**
  - The estimates were sent to the government representatives and/or key contacts of each MS for validation, which sometimes resulted in further data and fine-tuning of the take-up value.
  - Final elaboration of estimates for 19 MS, excluding the following:
    - **Latvia, the Netherlands and Slovakia** where the data was insufficient to carry out an estimate. In the case of the Netherlands, the national platform started e-Submission from September 2012 (beyond the time period for which we were collecting data) and we were not able to collect data from the private platforms. Because of insufficient value data on e-auctions for Slovakia, the calculation of a reliable estimate was not possible.
    - In **Bulgaria, Greece, Hungary, Luxemburg and Slovenia** e-Submission was not available in 2010–2011.
- **Calculation of e-Procurement take-up at the EU level**
  - Finally, we aggregated all the MS estimates into a total value of e-Procurement take-up at the EU level. However, since in many countries we carried out conservative estimates, and we are missing data points in several cases (including France, Denmark, Finland and the Netherlands) we believe that this estimate is likely to underestimate slightly the actual EU take-up and should be considered as a minimum value. Therefore, we present the EU level estimate as a range, between a minimum and a maximum value.

Given the current landscape of e-Procurement development and monitoring, we believe that our estimate is the best possible effort available today.

Unfortunately, the lack of comparable data means that we were unable to calculate any of the other indicators we were aiming for, such as:

- E-Procurement take-up in volume (based on the percentage of contracts processed with e-Submission on the total number of contracts).
- E-Procurement take-up in volume and value by SMEs and cross-border suppliers.
- E-Procurement take-up in volume and value by procedure and/or by type of purchase (supplies, services, public works).

These indicators were meant to be measured through the proof-of-concept trial.

2.3. Calculation of the Take-Up Value Indicator

The take-up value indicator by MS is calculated as follows:

- The numerator is the estimate of the absolute value of the public contracts awarded in the calendar year and processed in each MS with pre-award e-Procurement, up to and including at least e-Submission. This estimate includes also the value of contracts processed with e-auctions (since they require the submission of electronic quotations), with e-Ordering, with DPS and e-Catalogues, with some exceptions mentioned in the country profiles.
- The denominator is the value provided by Eurostat for general government procurement by country, excluding state-owned utilities spending, and including central, local, and state government spending, and social security funds. This is sourced from the European System of National and Regional Accounts (ESA 95)[1].

The baseline value of general government procurement for 2010 and 2011 includes 24 EU Member States. The general government procurement for the Netherlands, Latvia and Slovakia was detracted, since these countries were not estimated. The general government procurement of the 5 countries where e-Procurement is nil in the years considered instead is included.

We are aware that this aggregate by Eurostat is larger and less accurate than the definition of government spending used by most countries when calculating their own e-Procurement take-up. However, this is the only consistent and comparable source of general

[1] Data on general government procurement includes the aggregates P2 (intermediate consumption), P51 (gross fixed capital formation), D6311, D63121, D63131PAY (social transfers in kind related to expenditure on products supplied to households via market producers, payable) for S.13 (general government sector) of Table 2 ("main aggregates of general government") of the ESA95 transmission programme.

procurement value across the EU27, so we were forced to use it to compare the level of take-up by country. However, if a country has published an estimate of its take-up, we have published it alongside ours. For example, in the case of Portugal, the value of total e-Procurement is the same, but according to the Portuguese government take-up was 75% in 2010, while according to our calculation based on Eurostat data, take-up was 35%.

Other public sources used as reference points for the estimates were:

- The Eurostat survey on "Enterprises Using Internet for Accessing Tender Documents and Specifications in Electronic Procurement Systems of Public Authorities". This survey was used as a reference point for the dynamics of the demand for e-Procurement services, based on the growth of the percentage of enterprises by country.
- The TED data on number of tenders published, and average value per tender, for public procurement.

2.4. Results of the Value Survey of Platforms

The platform survey was addressed to 36 platforms extracted from the census database and identified as collecting data on e-Procurement as defined in this study (up to and including e-Submission).

The study team developed a simplified structured questionnaire; the interviews were personally carried out by the IDC study team in order to make use of personal contacts, to properly explain the requests and to guide the interviewees in the compilation of the questionnaire (for more information, including the questionnaire, see the Annex).

We carried out the survey from November 2012 to January 2013. The study team carried out a minimum of 3 emails and phone recalls to each interviewee; nevertheless, 20 of them refused consistently to answer the survey.

The study team collected 16 questionnaires, only 10 of which included data about the value and number of contracts (see Table 1), and 6 platforms providing only data on the number of contracts.

Table 1 Results of the Value Survey

Results of the Value Survey	
Total questionnaires sent	**36**
Total questionnaires answered	**16**
Questionnaires answered with value data	**10**
Questionnaires answered without value data	**6**
No answer	**20**

In addition, none of the respondents provided data on breakdowns of contracts by type of supplier (SMEs/cross-border supplier) or type of procedure or type of product (supplies/services/public works).

The main reasons for this refusal were as follows:

- Platforms do not classify economic operators as SMEs and/or cross-border suppliers; therefore, they do not collect this data.
- In a few cases, there were contingency events, such as a change of system, which suspended data collection and monitoring (e.g., Consip, Italy).
- Platforms are not authorised to provide data to the benchmarking organisation because it belongs to each of the Contracting Authorities involved.

2.5. Validation of Estimates

The take-up estimates were all sent to the national representatives of the MS and to key contacts for their feedback and validation.

This enabled the study team to collect further data inputs and suggestions to improve/revise the estimates. The final results of this process are presented in Table 2.

The table also shows which country estimates were updated compared to the first release presented in December 2012.

More specifically:

- 10 MS validated our estimates, which are highly reliable. They are **Cyprus, Czech Republic, Estonia, France, Ireland, Lithuania, Malta, Portugal, Romania and Sweden**. In France, as explained in paragraph 3.8, the estimate is limited to the contracts processed with e-Submission (thus excluding e-auctions and e-ordering within framework contracts) and over the threshold of €90,000.
- In 5 MS the estimates are based on data from the leading platforms, but national contacts were not able to validate them for lack of official data at national level, even though they were considered as reasonable. This is the case with **Austria, Denmark, Finland, Germany and Italy**.
- In 2 MS, the estimates are based on official data from public sources and questionnaires, but there was no reply to the request for validation. This is the case for **Belgium and Poland**.
- In 2 MS, the estimate is based on IDC assumptions: the data is scarce and there was no feedback from national contacts. This happened in **Spain and the UK**. In the case of the UK, the estimate is based on an ad hoc report prepared for IDC by a local expert and was informally validated by other experts.
- In the case of 3 MS (**Latvia, Netherlands and Slovakia**), we were unable to collect sufficient data to produce an estimate at all. The Latvian government collaborated but the statistics were not clear about take-up of electronic services other than e-Submission. Consequently, the EU level estimate does not

include these 3 MS, neither at the numerator, nor at the denominator.

- The take-up of e-Procurement is nil in the 5 MS where e-Submission was not available in 2010–2011 (**Bulgaria, Greece, Luxembourg, Hungary and Slovenia**).

Table 2 Final Results of the Validation of Estimates

MS	Value Survey	Request of validation sent to	Status	Changes from December Estimate
AT	No answer	Auftrag	Unable to validate for lack of official data	Estimate unchanged
BE	1 answer	Service Fédéral e-Procurement	No answer.	Estimate unchanged
CY	1 answer	Treasury of the Republic of Cyprus	Validated	Estimate updated
CZ	No answer	Ministry for Regional development	Validated	Estimate updated
DE	5 answers, 1 with value data for post-award	Beschaffungsamt des Bundesministeriums des Innern; Bundesministerium für Wirtschaft und Technologie	Unable to validate for lack of official data	Estimate updated
DK	1 answer	Danish Competition Authority	Unable to validate for lack of official data	Estimate unchanged
EE	1 answer	Ministry of Finance	Validated	Estimate updated
ES	No answer	Ministry of Industry and Public Administrations	No answer.	Estimate unchanged
FI	No answer	Cloudia and Hansel Oy	Unable to validate for lack of official data	Estimate updated
FR	1 answer	Ministry of Finance	Validated for tenders over 90,000 €	Estimate updated
IE		Office of Public Works	Validated	Estimate unchanged
IT	2 answers	Consip ; Centrale Acquisti Regione Lombardia; MIP Politecnico of Milano	Unable to validate for lack of official data	Estimate updated
LT	No answer	Public Procurement Office	Validated	Estimate updated
LV	No answer	State Regional Development Agency; The Procurement Monitoring Bureau	Unable to estimate	Impossible to estimate
MT	1 answer	Department of Contracts	Validated	Estimate updated
NL	No answer	Ministry of Economic Affairs - Directorate Competition and Consumers	Unable to estimate	Impossible to estimate
PL	1 answer	Public Procurement Office	No answer	Estimate updated
PT	1 answer	Instituto da Construção e do Imobiliário and Direção de Compras Públicas	Validated	Estimate updated
RO	No answer	National Authority for Regulating and Monitoring Public Procurement	Validated	Estimate updated
SE	No answer	Swedish Procurement Service;Swedish Association of Local Authorities and Regions	Validated	Estimate updated
SK	No answer	Slovakian Public Procurement Office	Unable to estimate	Impossible to estimate
UK	No answer	Scottish Procurement & Commercial Directorate; GPS UK; Bravosolutions, UK	No answer	Estimate updated by IDC decision

Validated	Impossible to estimate

2.6. Take-Up at the EU level between 2010 and 2011

The growth rate for the value of e-Procurement between 2010 and 2011 in the low range estimate (Table 3) is around 13.4% in value. As a percentage ratio of e-Procurement over total public procurement, the growth of the indicator is slightly higher (13.7%), because the value of public procurement declined slightly in 2011 compared to 2010. However, the economic crisis does not seem to have accelerated the adoption of e-Procurement as much as could have been expected, given its potential benefits in efficiency and control of public spending. It is also worth noting that since e-Procurement is still marginal (under 10% of public spend in most countries), the tendering of a few large public contracts and other contingency factors are sufficient to push up or down the total level of take-up from one year to another.

For example, in Italy the total value of e-Procurement by the two leading platforms declined sharply from 2010 to 2011 because of a temporary cessation (due to a change in technical platform) and because a few large framework contracts for pharmaceuticals were negotiated in 2010 and not in 2011.

Table 3 Minimum Estimate of EU Level Take-Up

TOTAL EU	2010	2011	Growth 2011/2010
General government procurement (No NL, LV, SK)	1,606,622	1,602,172	-0.3%
e-Procurement value (No NL, LV, SK)	149,957	170,069	13.4%
Take-up	9.3%	10.6%	13.7%

Source: IDC, March 2013

The calculation of the upper range of the estimate (Table 4) was performed with a "sensitivity analysis" approach, by pushing to the upper range the estimate of all the MS where we have insufficient data and a share of e-Procurement activity may have escaped our analysis. We did not change the estimate for the MS where it was validated by local representatives.

Table 4 Maximum Estimate of EU Level Take-Up

TOTAL EU	2010	2011	Growth 2011/2010
General gov procurement + NL (No LV, SK)	1,742,226	1,738,680	-0.2%
e-Procurement + BE, DE, DK, FI, FR, IT, NL, UK (No LV, SK)	173,950	202,719	16.5%
Take-up	10.0%	11.7%	16.8%

Source: IDC, 2013

This calculation therefore was focused on the following countries:

- First, we added the Netherlands. We assumed (even lacking data) that the Netherlands could have a take-up of 6% in 2010 and 7% in 2011, on private platforms (Table 45). This assumption is quite optimistic, but is based on the high level of development of e-government in the Netherlands and on the 16% of Dutch enterprises claiming to use the Internet for "accessing tender documents and specifications in electronic procurement systems of public authorities", which is higher than the 13% in Belgium (where take-up is at 3.4% in 2011).
- We estimated the additional value of e-Procurement in France for tenders of value under €90,000 (for which we have no data) at €2.5 billion in 2010 and €4.6 billion in 2011.
- We doubled the value of e-Procurement in Finland and Denmark, where there is a high number of private platforms on which we have no data, and a general environment probably favourable for e-Procurement.
- We increased, by between 10% and 20%, the absolute value of e-Procurement in Belgium, Italy and Germany, to take into account additional value of e-Procurement by regional platforms not completely accounted for.
- We raised the UK e-Procurement value by 7%–9% (which is the upper range of the estimate provided by our local expert).

The result of this process is a high range estimate of the value of e-Procurement in the EU of €203 billion in 2011, with a take-up close to 12%. This "maximum" estimate represents only a 1% variation on the "minimum" estimate take-up. Moreover, only by changing the estimates of the large countries (particularly the UK and Germany) we were able to make a difference in the total EU27 uptake. This is because the value of e-Procurement in most MS is so small that the variation only slightly affects the EU total. In other words, this exercise confirms that the potential margin of error of this take-up estimate is not large and the estimate is quite reliable. Specifically, the evidence that e-Procurement has only a very marginal impact on public procurement flows in most MS has strengthened and seems difficult to deny.

The assumptions behind each MS estimate are explained in detail in the following pages. Based on our detailed research, we have reached a good visibility on e-Procurement take-up by national administrations. There is much less information on take-up by local and regional administrations. However, initiatives by large regional and municipal administrations are fairly visible and have been documented as much as possible. The only country where the lack of information about the diffusion of e-Procurement at the regional-local level might make a relevant difference is Germany.

3. STATE OF PLAY OF E-PROCUREMENT

The following chapter presents the detailed analysis of the state of play for each Member States. The figures presented correspond to the "minimum estimate", if not otherwise stated.

3.1. Austria

3.1.1. State of Play

According to our estimates, the value of e-Procurement in Austria was €2.4 billion in 2011, corresponding to approximately 7.5% take-up (Table 5). In the EU27 e-Procurement ranking, Austria ranks 8th in value and 7th in the take-up level. E-Procurement increased sharply from 2010 to 2011 by 27.1% in value.

The estimate is based on:

- The extrapolation of limited data from the national platforms;
- A direct interview with Auftrag.at platform, including opinions about the dynamics of development of e-Procurement;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, particularly by the central government, driven by a proactive policy from the federal government;
- The existence of a well-developed offering infrastructure (nine e-Procurement entities, of which seven offer e-Submission[2]);
- A proportion of enterprises using the Internet for public e-Procurement higher than the EU average (Eurostat), with good growth dynamics from 2011 to 2012.

In Austria, e-Submission is voluntary. The federal government is pushing strongly for e-notification and the adoption of e-Submission particularly by central administrations, as indicated in the e-Procurement "master plan" of the federal government. There is a plan to comply early with the forthcoming EC Directive by making e-Submission mandatory as soon as it will be requested by the directive.

The national e-Procurement infrastructure is organised around two main platforms: Auftrag.at[3] for the pre-award phase and Bundesbeschaffung GmbH[4] (BBG), the Federal Procurement Platform, for post-award.

Auftrag.at is the main Austrian platform for the pre-award phase. It is part of the Wiener Zeitung group, the Austrian Official Federal Gazette, and it is mandated to publish all public tenders in Austria. In addition, it offers services to Contracting Authorities and business operators, from e-notification to e-Submission.

Auftrag.at collects only data about the number of notices published on the platform: in the last fiscal year, 6,000 notices were published on the

[2] Source: Table 28, "The 266 e-Procurement Entities Population by MS", page 109, D1-e-Procurement Landscape Report
[3] https://www.pep-online.at/BC/
[4] http://www.bbg.gv.at/

platform. They estimate that nearly 95% of the procurement tenders published in Austria by all government tiers are published online. 50% of all the tenders published online make tender specifications available online. However, only Contracting Authorities have visibility on the value of tendered contracts.

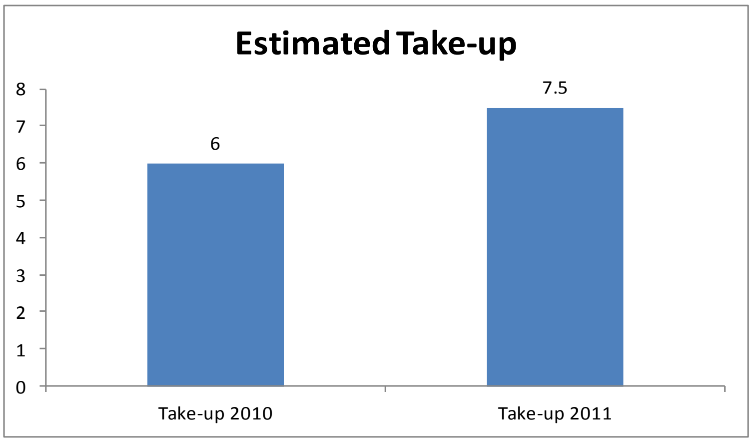
Bundesbeschaffung GmbH (BBG) is the centralised purchasing agency for the federal government in Austria for standardised goods and services (excluding public works and defence). It is more focused on e-ordering and contract management. The use of its services is mandatory for federal authorities above the EU threshold. BBG runs the online shop for public buyers. This shop comprises almost the entire collection of contracts the BBG holds and it is open for all public entities and utility providers in Austria.

Table 5 Estimate of e-Procurement Take-Up in Austria (€Million, Minimum Estimate)

Austria	2010	2011	Growth 2011/2010
General government procurement	32,253	32,795	1.7%
e-Procurement	1,935	2,460	27.1%
Take-up	6.0%	7.5%	25.0%

Source: IDC, 2013

Figure 2 Estimate of e-Procurement % Take-Up in Austria (Minimum Estimate)



Source: IDC, 2013

Table 6 Data Sources — Austria

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)[5]	23% (2011) 27% (2012)
BBG: Facts & figures about the e-Shop, about Federal Procurement Austria	2010–2011

Source: IDC, 2013

3.1.2. Validation Results: No Validation for Lack of Official Data

The e-Procurement estimates were sent to:

- Auftrag.at, which was unable to validate the estimate for lack of data and visibility of overall take-up in the country.

3.2. Belgium

3.2.1. State of Play

According to our estimates, the value of e-Procurement in Belgium was €1.6 billion in 2011, corresponding to approximately 3.4% take-up (Table 7). In the EU27 e-Procurement ranking, Belgium ranks 11th both in terms of value and of take-up level. e-Procurement increased sharply from 2010 to 2011 by approximately 36.6% in value, but the level of adoption is still limited.

Belgium is moving towards mandatory e-Submission. Since July 1, 2012, ministries must accept electronic offers. Since December 31st, 2012, all federal authorities are obliged to accept electronic offers. E-Submission is already mandatory in Flanders: since January 1, 2012, all state authorities must use the national e-tendering platform for procurement.

The e-Procurement infrastructure in Belgium is based on public platforms. The regional governments of Flanders and Bruxelles Capitale have decided to use the platform developed by the federal government[6]. The Wallonie region has provided e-Submission since January 2012[7]. The federal government portal provides e-ordering services only for those goods and services offered under framework contracts through e-catalogues; e-auction and DPS are operational.

The estimate is based on:

- Extrapolation of data from the e-Procurement value survey questionnaire filled in by the Flemish government and other reports.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;

5 http://epp.eurostat.ec.europa.eu/portal/page/portal/statistics/search_database/

6https://eten.publicprocurement.be/etendering/home.do;jsessionid=%2051690A4079C8F739601F0283689115

7 On the platform http://marchespublics.wallonie.be

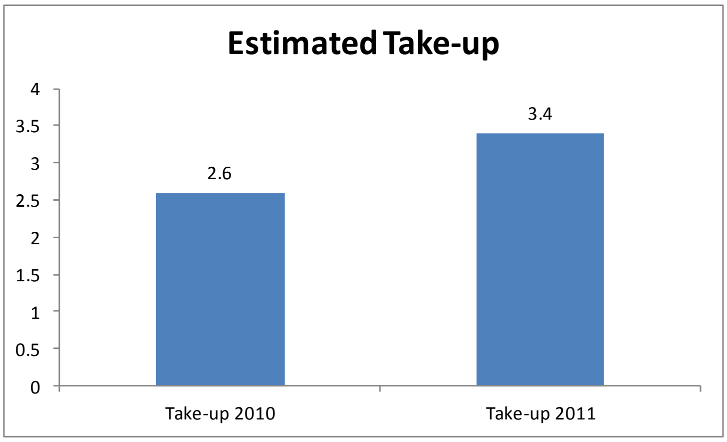
- The level of development of the offering infrastructure (four e-Procurement entities identified, of which three public platforms offer e-Submission);
- The share of enterprises using the Internet for public e-Procurement is lower than the EU average (Eurostat), signalling still limited take-up by suppliers.

Table 7 Estimate of e-Procurement Take-Up in Belgium (€Million, Minimum Estimate)

Belgium	2010	2011	Growth 2011/2010
General gov procurement	47,178	49,590	5.1%
e-Procurement	1,218	1,664	36.6%
Take up	2.6%	3.4%	30.0%
Additional e-Procurement value for high-range estimate	*200*	*300*	
Total e-Procurement value — high range estimate	*1,418*	*1,994*	

Source: IDC, 2013

Figure 3 Estimate of e-Procurement % Take-Up in Belgium (Minimum Estimate)



Source: IDC, 2013

Table 8 Data Sources — Belgium

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	13% (2011) 16% (2012)
Evidence from "Les marches publics électroniques" report by Service Public Federal, the "e-Procurement — meten van beheerskosten" report by the Flemish government, and the PPT presentation made on January 25, 2012, by the Wallonie government.	2011–2012

3.2.2. Validation Results — No Answer

The estimate was sent to:

- The Service Fédéral e-Procurement, Belgium. It did not provide us with any feedback.

3.3. Cyprus

3.3.1. State of Play

According to our estimates, the value of e-Procurement in Cyprus was €8.9 million in 2011, corresponding to approximately 0.6% take-up (Table 9), still very low. In the EU27 e-Procurement ranking, Cyprus ranks 18th in value and 17th in take-up level. E-Procurement increased sharply from 2010 to 2011, by approximately 12.7% in value, but the level of adoption is still limited.

The estimate is based on:

- Elaboration of data from the e-Procurement value survey questionnaire filled in by the Treasury and other public sources.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country.

Cyprus has centralised all its e-Procurement activities around the national public platform[8], and is now moving towards mandatory e-Submission.

By December 31, 2013, at least 50% of procurement submissions should be carried out electronically by central purchasing bodies. If this is achieved, from January 2014 the electronic submission of tenders will be requested in at least half of the competitions.

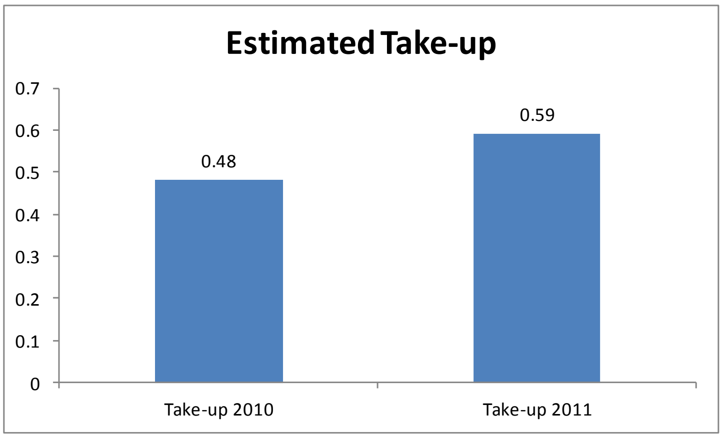
[8] https://www.e-Procurement.gov.cy/ceproc/home.do

Table 9 Estimate of e-Procurement % Take-Up in Cyprus (€Million, Minimum Estimate)

Cyprus	2010	2011	Growth 2011/2010
General gov procurement	1,658	1,497	-9.7%
e-Procurement	7.9	8.9	12.7%
Take up	0.48	0.59	24.7

Source: IDC, 2013

Figure 4 Estimate of e-Procurement % Take-Up in Cyprus (Minimum Estimate)



Source: IDC, 2013

Table 10 Data Sources — Cyprus

Data Sources	Year
Data on public procurement published on TED	2010
The e-Procurement value survey filled in by Public Procurement Directorate Treasury of the Republic of Cyprus	2010–2011
The website of the national e-Procurement platform and the presentation titled "Cyprus e-Procurement System" made by the Public Procurement Directorate on March 2011	2011–2012

Source: IDC, 2013

3.3.2. Validation Results — Validated

The estimates were sent to:

- The Treasury of the Republic of Cyprus, and it confirmed their validity.

3.4. Czech Republic

3.4.1. State of Play

According to our estimates, the value of e-Procurement in the Czech Republic was €58 million in 2011, corresponding to 0.2% take-up (Table 11), still very low. In the EU27 e-Procurement ranking, the Czech Republic ranks 16th in value and 19th in the take-up level. E-Procurement actually seems to have decreased from 2010 to 2011 by 18.3% in value. However, in the same period the ministry used DPS for €4 million in 2010, growing to €6 million in 2011.

The estimate is based on:

- Extrapolation of data from the national platform run by the Ministry of Regional Development, validated by representatives of the ministry.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The limited level of development of the offering infrastructure (three e-Procurement entities, of which two platforms offer e-Submission);
- The share of enterprises using the Internet for public e-Procurement was lower than the EU average in 2011 (Eurostat), signalling still limited take-up by suppliers (but it increased rapidly in 2012).

The national e-Procurement strategy for 2011–2015 is focused on the NIPEZ Project (National Infrastructure for Electronic Public Procurement http://projekty.osf-mvcr.cz/en/27/default.aspx), which should insure the full availability of the whole e-Procurement cycle for all Contracting Authorities by 2015.

There are mandatory take-up targets for e-Procurement: national Contracting Authorities should procure 100% of the value of centralised goods and services purchases in the electronic marketplaces. Their sub-units must procure 50% of the same. A key objective of this strategy is to achieve savings in public spending of CZK 50 billion per year. However, this approach is concentrated on promoting e-Ordering from e-Catalogues, rather than e-tendering.

The new platform[9] was launched in Prague in February 2012. The e-marketplace is used for the centralised procurement contracts of national authorities, which are mandatory, for a number of categories of goods and services.

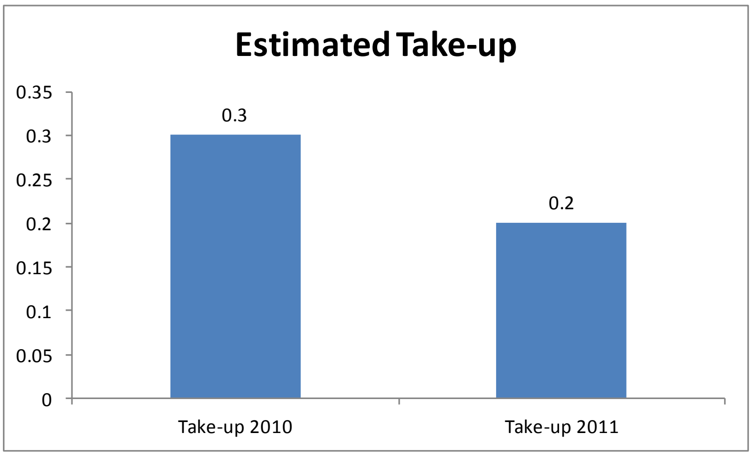
[9] www.portal-vz.cz

Table 11 Estimate of e-Procurement Take-Up in the Czech Republic (€Million, Minimum Estimate)

Czech Republic	2010	2011	Growth 2011/2010
General gov procurement	24,571	23,989	-2.4%
e-Procurement	71	58	-18.3%
Take-up	0.3%	0.2%	-16.3%

Source: IDC, 2013

Figure 5 Estimate of e-Procurement % Take-Up in the Czech Republic (Minimum Estimate)



Source: IDC, 2013

Table 12 — Data Sources — Czech Republic

Data Sources	Year
Data on public procurement published on TED	2010
The National Platform[10]	2010–2011
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	16% (2011) 25% (2012)

Source: IDC, 2013

3.4.2. Validation Results: Validated

The estimates were sent to:

- The Ministry for Regional Development, which provided us with new data on the use of DPS and validated the final results.

10 http://www.portal-vz.cz/NIPEZ-El-trziste-verejne-spravy/Statistiky-e-trzist

3.5. Denmark

3.5.1. State of Play

According to our estimates, the value of e-Procurement in Denmark was €1.8 billion in 2011, corresponding to approximately 5.5% take-up (Table 13). In the EU27 e-Procurement ranking, Denmark ranks 10th in value and 9th in take-up level, much lower than Sweden. This is surprising because Denmark usually has a performance similar to Sweden in terms of diffusion and impact of ICT[11]. E-Procurement increased from 2010 to 2011 but only by 11.1% in value. The estimate is based on:

- Extrapolation of data from the e-Procurement value survey questionnaire filled in by the Amgros platform and other public sources.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The good level of development of the offering infrastructure (eight e-Procurement entities identified, with five platforms offering e-Submission).
- The share of enterprises using the Internet for public e-Procurement was higher than the EU average in 2011 (Eurostat), and it increased to 25% in 2012. This hints at a positive dynamic of use of e-Procurement.

Denmark has no mandatory strategy for e-Procurement. The central purchasing body SKI negotiates framework contracts between the public sector in Denmark and private sector companies and runs the national e-Procurement platform[12], providing e-Tendering and e-catalogue services. The use of SKI by Contracting Authorities is voluntary, even though it is strongly encouraged for the products and services covered by the FA. The advertising portal[13] is managed by the Danish Competition Authority and is mandatory for all. The information about e-Procurement value was particularly scarce in Denmark. Our estimate is very conservative and we believe that we are missing at least some of the e-Procurement activity by private platforms and other public platforms. For the higher range estimate, we have hypothesised that the value could be 100% higher.

[11] According to IDC data, in 2011 IT spending on GDP in Denmark was 3.37% while in Sweden it was 3%

[12] http://www.ski.dk/

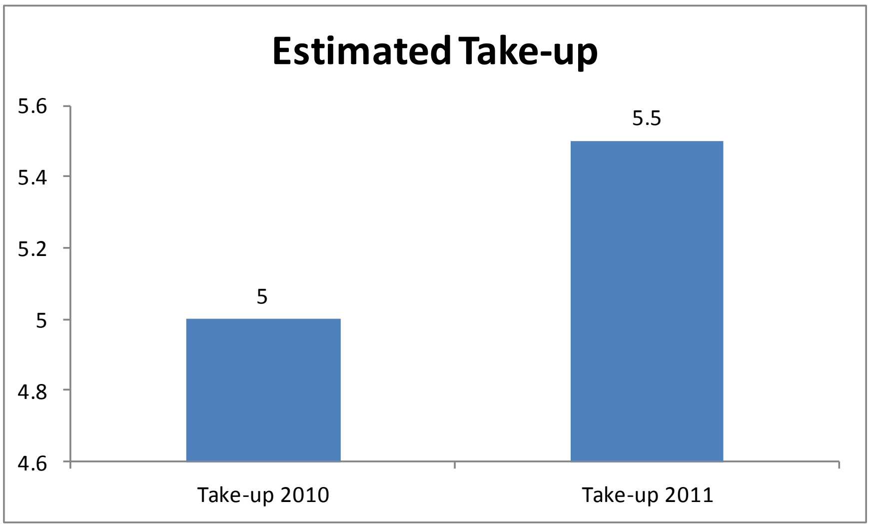
[13] http://www.udbud.dk/

Table 13 Estimate of e-Procurement Take-Up — Denmark (€Million, Minimum Estimate)

Denmark	2010	2011	Growth 2011/2010
General gov procurement	32,275	32,554	0.9%
e-Procurement	1,614	1,790	11.1%
Take-up	5.0%	5.5%	10.0%
Additional e-Procurement value for high-range estimate	1,614	1,790	
Total e-Procurement value — high range estimate	3,228	3,580	

Source: IDC, 2013

Figure 6 Estimate of e-Procurement % Take-Up in Denmark (Minimum Estimate)



Source: IDC, 2013

Table 14 Data Sources — Denmark

Data Sources	Year
Data on public procurement published on TED	2010
Value questionnaire from the Amgros platform	2010, 2011, 2012
Information from central procurement body SKI on framework contracts	2011
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	23% (2011) 25% (2012)

Source: IDC, 2013

3.5.2. Validation Results: No Validation for Lack of Official Data

The e-Procurement estimates were sent to:

- The Danish Competition Authority, but it was unable to validate the estimates for lack of data and visibility of overall take-up in the country.

3.6. Estonia

3.6.1. State of Play

According to our estimates, the value of e-Procurement in Estonia was €42 million in 2011, corresponding to approximately 2.0% take-up. This value grew to approximately €182 million in 2012, up to the end of October 2012, with 1,201 contracts processed with e-Submission (Table 15). In the EU27 e-Procurement ranking based on 2011 data, Estonia ranks 17th in value and 13th in take-up level, which is encouraging, as it only started e-Procurement in 2011. We cannot calculate take-up in a comparable way to other countries for 2012 (because we are missing the Eurostat baseline for 2012, which is the denominator), but according to the national government's estimates, take-up reached 7.4% in 2012.

The estimate is based on:

- Extrapolation of data from the e-Procurement value survey questionnaire filled in by the Ministry of Finance of the Republic of Estonia (managing the e-Procurement platform) and other input from the same source.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The level of development of the offering infrastructure (two e-Procurement entities identified, one of which is the national public platform and the other a private platform, both offering e-Submission);
- The share of enterprises using the Internet for public e-Procurement was close to the EU average in 2011 (Eurostat), and it increased to 23% in 2012, higher than the EU average, showing a positive dynamic of take-up by suppliers.

Estonia has chosen a model focused around the national public platform. Contracting Authorities are free to use the platform, the Public Procurement Register[14], but from 2013, they are obliged to use e-Procurement for at least 50% of their planned procurement budget (according to the Public Procurement Act entered into force in 2007). E-Notification is mandatory for all on the Public Procurement Register.

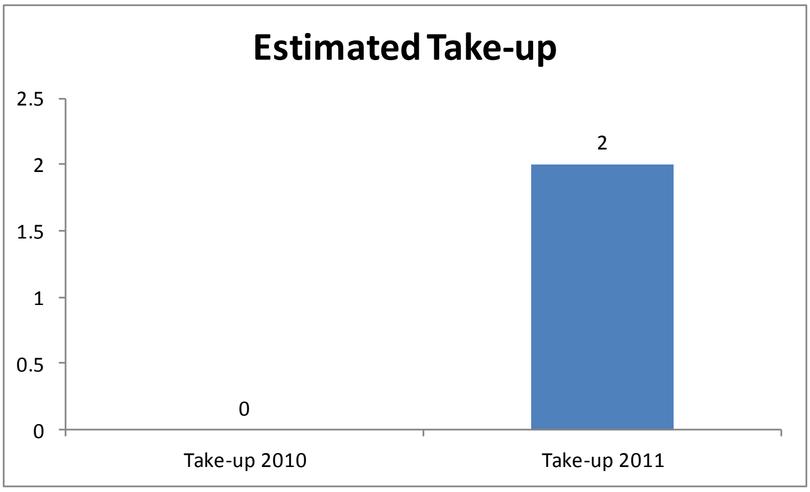
[14] https://riigihanked.riik.ee/

Table 15 Estimate of e-Procurement Take-Up — Estonia (€Million)

Estonia	2010	2011	Growth 2011/2010	2012
General gov procurement	1,898	2,082	9.7%	
e-Procurement	-	42	-	182
Take-up	0.0%	2.0%	-	
Total public procurement calculated by country	*1,807*	*3,183*	*76%*	*2,471*
Take-up calculated by country		*1.3%*		*7.4%*

Source: IDC, 2013

Figure 7 — Estimate of e-Procurement % Take-Up in Estonia (Minimum Estimate)



Source: IDC, 2013

Table 16 Data Sources — Estonia

Data Sources	Year
Data on public procurement published on TED	2010
Value questionnaire from Estonia national platform	2010, 2011, 2012
Information from Estonia platform website	2011
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	19% (2011) 23% (2012)

Source: IDC, 2013

3.6.2. Validation Process — Validated

The estimates were sent to:

- The Ministry of Finance, which validated the 2011 data and provided its own estimate of total public procurement and level of take-up for 2012, reported in Table 15.

3.7. Finland

3.7.1. State of Play

According to our estimates, the value of e-Procurement in Finland was €1,404 million in 2011, corresponding to 4.5% take-up (Table 17). In the EU27 e-Procurement ranking, Finland ranks 12th in value and 10th in take-up level. This is a somewhat surprising position given the high orientation towards ICT in the Scandinavian countries. E-Procurement grew by 34.5% in value from 2010 to 2011. To calculate the higher range estimate, we have hypothesised that the value of Finnish e-Procurement could be twice as high, driven by activity in the other platforms which were outside of our data collection.

The estimate is based on:

- Extrapolation of data provided by the national e-Procurement platform Hansel Oy and the regional platform Cloudia Oy.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The development of the offering infrastructure, even though the national public procurement platform will start offering e-Submission only from the summer of 2013 (14 e-Procurement entities, of which at least three offer e-Submission[15]);
- A share of enterprises using the Internet for public e-Procurement higher than the EU average (Eurostat), both in 2011 and 2012.

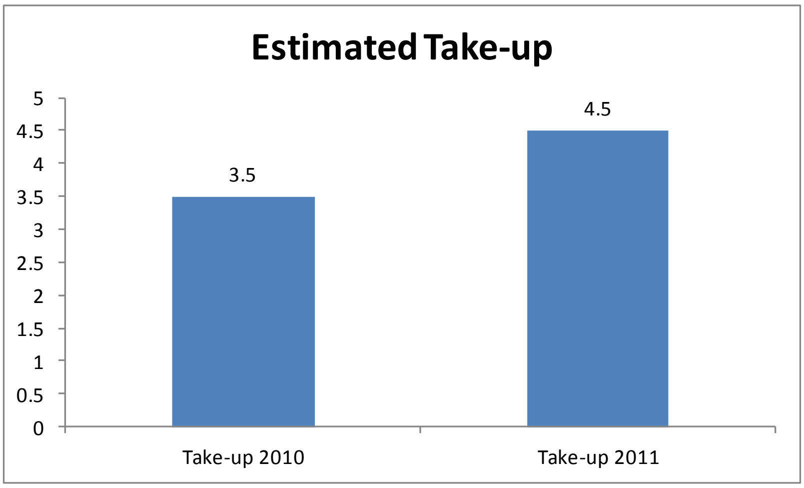
Table 17 Estimate of e-Procurement Take-Up — Finland (€Million)

Finland	2010	2011	Growth 2011/2010
General gov procurement	29,813	31,194	4.6%
e-Procurement	1,043	1,404	34.5%
Take-up	3.5%	4.5%	28.6%
Additional e-Procurement value for high-range estimate	*1,043*	*1,404*	
Total e-Procurement value — high range estimate	*2,086*	*2,808*	

Source: IDC, 2013

[15] Source: Table 28, "The 266 e-Procurement Entities Population by MS", page 109, D1-e-Procurement Landscape Report

Figure 8 Estimate of e-Procurement % Take-Up in Finland (Minimum estimate)



Source: IDC, 2013

Finland has a strategy for efficient public procurement, which includes the implementation of electronic processes by Hansel. Hansel Oy[16] is the central purchasing body of the Finnish government, which puts out to tender the goods and services (ICT procurement, administrative services, materials and technical services) required by the public administration and maintains the related framework agreements and an e-catalogue system.

Hansel has on its extranet site several tools for conducting mini-tendering on the framework agreements it has established for the central government (call-offs). It is also developing a total order management system (TILHA) for e-Ordering.

Hilma[17] is the central e-Procurement platform, and all Contracting Authorities are obliged to publish all contract notifications exceeding the national threshold on the Hilma portal. An e-tendering system will be offered from 2013.

The service provider Cloudia Oy[18] provides e-Procurement services to all the regional governments on the Kuntahankinnat[19] platform.

Table 18 shows data on the use of the e-catalogue system in 2012.

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16 http://www.hansel.fi/fi
17 http://www.hankintailmoitukset.fi/fi/
18 http://www.cloudia.fi/
19 http://www.kuntahankinnat.fi/

Table 18 Data on e-Catalogue Orders — Finland (€Million)

Data Sources	Jan 2012–Aug 2012
Number of state purchase orders (invoices)	895,668
Number of orders placed with the e-catalogue system	43,529
% of orders placed with the e-catalogue system	4.86%
Value of state purchase orders (€M)	2,632
Value of orders placed with the e-catalogue system (€M)	15

Source: Hansel Oy, 2012

Table 19 Data Sources — Finland

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	30% (2011) 31% (2012)
Data from Hansel Oy and Cloudia	2011–2012

Source: IDC, 2013

3.7.2. Validation Results — No Validation for Lack of Official Data

The estimates were sent to:

- Hansel Oy and Cloudia, which considered the estimates broadly acceptable, but were unable to provide validation due to a lack of official data.

3.8. France

3.8.1. State of Play

According to our estimates, the value of e-Procurement in France was €4,626 million in 2011, corresponding to approximately 1.6% take-up (Table 20): this data refers only to contracts valued over €90,000.

In the EU27 e-Procurement ranking, France ranks 5th in value, but only 14th in take-up level, a somewhat surprising position. e-Procurement grew by approximately 87.4% in value from 2010 to 2011, but remains marginal.

To calculate the higher range estimate, we have assumed that the value of French e-Procurement under the threshold of €90,000 could be at least equal to the value over that threshold. This would still represent only a 3% take-up level, of course.

The estimate is based on:

- Extrapolation of data provided by the national e-Procurement platform value questionnaire, the platforms Megalis and e-

Bourgogne, and especially official data from the Ministry of Finance;

- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, based on direct interviews with French representatives of the Ministry of Finance and some stakeholders;
- The good level of development of the offering infrastructure (54 e-Procurement entities, 40 of which offer e-Submission, about half of them private procurement platforms[20]);
- The share of enterprises using the Internet for public e-Procurement is among the highest in Europe (Eurostat), both in 2011 and 2012. Perhaps this reflects only the first phase of e-Procurement, concerning e-access to tender documents.

France has a highly developed regulatory framework for public procurement: dispositions for the development of e-Procurement are included in the National Code for Public Procurement.

Since January 1, 2012, Contracting Authorities cannot refuse any electronic communication in any procurement process, of value over the €90,000 threshold. E-Submission is mandatory for IT tenders.

The public e-Procurement infrastructure is driven by the national platform Place des Marchés Interministérielle[21], managed by the Service des Achats de l'Etat (SAE), which is mandatory for central Contracting Authorities. Some regions have centralised public platforms (Bourgogne, Bretagne). There are a high number of private service providers.

The French government has made a strong effort to promote e-Procurement in the pre-award phase, but the complexity of the regulatory environment and the reluctance by Contracting Authorities to migrate to electronic processes has resulted in still marginal take-up.

The submission of an electronic bid must be accompanied by paper-based backup copies or a CD; this reduces the benefits of dematerialisation and represents a strong barrier for economic operators, particularly SMEs.

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[20] Source: Table 28, "The 266 e-Procurement Entities Population by MS", page 109, D1-e-Procurement Landscape Report

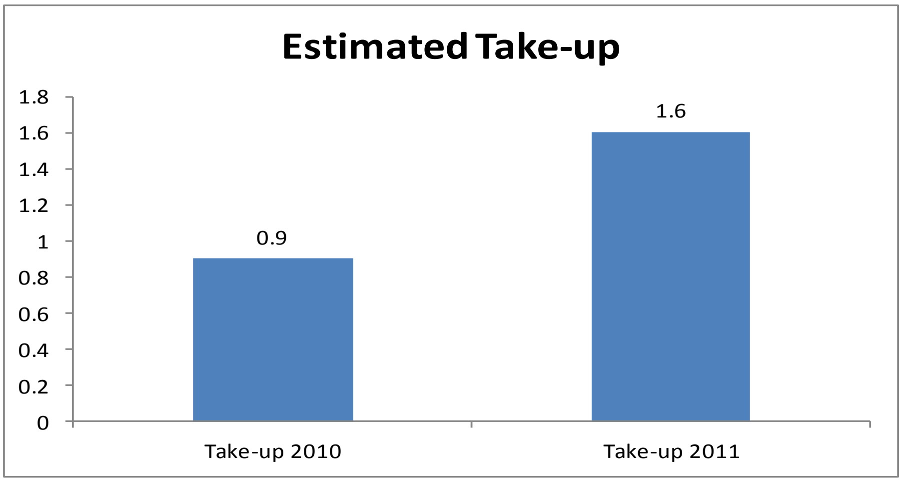
[21] https://www.marches-publics.gouv.fr/?page=entreprise.EntrepriseHome

Table 20 Estimate of e-Procurement Take-Up — France (€Million)

France	2010	2011	Growth 2011/2010
General gov procurement	290,386	292,745	0.8%
e-Procurement*	2,469	4,626	87.4%
Take-up	0.9%	1.6%	85.9%
Additional e-Procurement value for high-range estimate	*2,469*	*4,626*	
Total e-Procurement value — high range estimate	*4,938*	*9,252*	

Source: IDC, 2013 — *this data refers ONLY to contracts of value over €90,000

Figure 9 Estimate of e-Procurement % Take-Up in France (Minimum Estimate)



Source: IDC, 2013

Table 21 Data Sources — France

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	30% (2011) 32% (2012)
The report "Observatoire Economique de l'Achat Public" by Ministère de l'Economie, Finances, Industrie	2011
The report "Place des PME dans les marchés publics en 2010" by Direction des Affairs Juridiques	2010
Value questionnaire by the Ministry of Finance	2010–2011
Data provided by the Service des Achats de l'Etat (SAE) and the platforms Megalis and e-Bourgogne	2010–2011

Source: IDC, 2013

3.8.2. Validation Results — Validated

The estimates were sent to:

- The Ministry of Finance (Ministère du Budget, des comptes publics, de la fonction publique et de la réforme de l'Etat), which provided the data for take-up for contracts valued over €90,000 only and confirmed this estimate.

3.9. Germany

3.9.1. State of Play

According to our estimates, the value of e-Procurement in Germany was €38,819 million in 2011, corresponding to 10.3% take-up (Table 22). In the EU27 e-Procurement ranking, Germany ranks 2nd in value and 6th in take-up level. e-Procurement grew by 27.9% in value from 2010 to 2011. Germany comes first after the small group of MS that have really embraced e-Procurement and leads the group of runners-up. While 10% cannot be considered a high level of take-up, reaching this threshold means that e-Procurement is starting to involve a substantial amount of contracts.

To calculate the higher range estimate, we have hypothesised an additional value of e-Procurement of 16% of the current value in 2010 and 18% in 2011, driven by the other German e-Procurement platforms on which we have no precise data.

The estimate is based on:

- Extrapolation of data provided by the five platforms responding to the value questionnaire. Unfortunately, this data was only about the number of contracts and not about value;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, based on interviews with the Ministry of Interiors and research on e-Procurement in the Länder of Hesse, North-Rhine Westphalia and Saxony;
- The good level of development of the offering infrastructure (40 e-Procurement entities, 24 of which offer e-Submission, many of them private procurement platforms[22]);
- The percentage of enterprises using the Internet for public e-Procurement is among the highest in Europe (Eurostat), both in 2011 and 2012. Perhaps this reflects only the first phase of e-Procurement, concerning e-access to tender documents.

The federal government has an e-Procurement plan mainly focused on the centralisation of procurement for federal authorities using centralised e-Procurement platforms (Public Procurement Online — Öffentlicher Eink@uf Online Programme). The Federal Procurement Agency[23] runs the e-Procurement platforms eVergabe[24] (pre-award) and Kaufhaus des

[22] Source: Table 28, "The 266 e-Procurement Entities Population by MS", page 109, D1-e-Procurement Landscape Report
[23] http://www.bescha.bund.de
[24] http://www.evergabe-online.de/

Bundes[25]. eVergabe provides pre-award services to federal authorities (which are required to use it) and to all other authorities. At the end of 2012, it had 100 registered federal agencies and 250 regional-local Contracting Authorities. It provides services above and below the EU threshold.

Its use grew sharply from 2011 to 2012, with an increase of 237% in electronic tenders. It is mandatory for federal agencies, unless they have demonstrable economic, technical and/or practical reasons preventing them from using the electronic tools.

The Kaufhaus des Bundes offers e-Ordering and e-Catalogue services to manage framework agreements and its use is mandatory for several federal procurement bodies.

In June 2012, it had 483 federal public agencies registered, and 453 framework agreements for 70,000 products. The value of calls processed increased by 25% in 2011 to €105 million from €84 million in 2010.

Länders and municipalities are completely autonomous for e-Procurement and many of them have developed independent e-Procurement platforms. However, the federal procurement agency has launched the project XVergabe to harmonise the different e-Procurement platforms by using a multiplatform client.

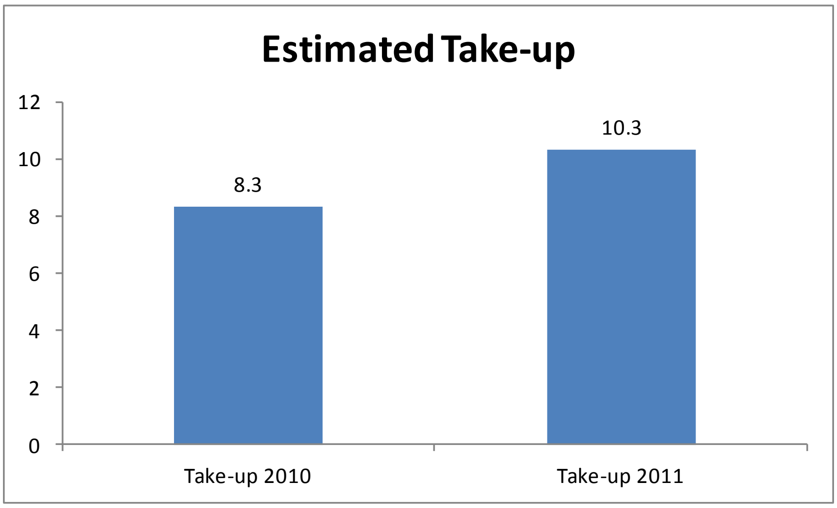
Table 22 Estimate of e-Procurement Take-Up — Germany (€Million)

Germany	2010	2011	Growth 2011/2010
General gov procurement	363,650	377,300	3.8%
e-Procurement	30,344	38,819	27.9%
Take-up	8.3%	10.3%	23.3%
Additional e-Procurement value for high-range estimate	*5,000*	*7,000*	
Total e-Procurement value — high range estimate	*35,344*	*45,819*	

Source: IDC, 2013

[25] http://www.kdb.bund.de/

Figure 10 Estimate of e-Procurement % Take-Up in Germany (minimum estimate)



Source: IDC, 2013

Table 23 Data Sources — Germany

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	17% (2011) 19% (2012)
e-Procurement value survey filled in by HAD.de, Healy Hudson, Veenion, North-Rhine Westphalia, Saxony (value data only provided by Veenion)	2010–2011
Official data provided by the Procurement Agency of the Federal Ministry of the Interior, which runs the federal e-tendering platform eVergabe	2010–2011
OECD 2011 report	2010–2011

Source: IDC, 2013

3.9.2. Validation Results: Not Validated for Lack of Official Data

The estimates were sent to:

- The Federal Ministry of the Intern (Beschaffungsamt des Bundesministeriums des Innern) and to the Federal Ministry of Economics and Technology (Bundesministerium für Wirtschaft und Technologie) and both were unable to validate them due to lack of official data, even if they considered the estimates reasonable.

3.10. Ireland

3.10.1. State of Play

According to our estimates, the value of e-Procurement in Ireland was €3,801 million in 2011, corresponding to 22.3% take-up (Table 24). In the EU27 e-Procurement ranking, Ireland ranks 6th in value and 5th in take-up level, in the very small group of MS with take-up higher than 10%. However, due to the economic crisis, public procurement decreased from 2010 to 2011, and e-Procurement also decreased but only slightly (-0.6%), therefore increasing its penetration.

The estimate is based on:

- Extrapolation of data provided by the national procurement service and the national platform e-tenders;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, based on interviews with the National Public Procurement Unit (NPPU);
- The level of development of the offering infrastructure (two public platforms, offering e-notification and e-Submission services[26] respectively);
- The percentage of enterprises using the Internet for public e-Procurement, which is the highest in Europe (Eurostat), both in 2011 and 2012.

The Strategy for the Implementation of e-Procurement in the Irish Public Sector dates back to 2011 and is aimed at the development of a national e-Procurement system centred on the platform e-tenders[27]. The use of e-Submission is voluntary, but recommended. In July 2012, the government published a new circular introducing some mandatory framework agreements for the central Contracting Authorities. The National Public Procurement Unit (NPPU) manages the platform and pursues a proactive policy of promotion of the use of e-Procurement by public buyers, including specific provisions to maximise the participation of SMEs. Ireland is an open economy, and the Irish NPPU believes that wins by foreign suppliers is probably one of the highest in the EU27. For 2011, approximately 15% of contracts in volume and 5% in value were awarded to non-Irish suppliers from the rest of the EU. Suppliers from Northern Ireland or England won approximately 20% of the contracts.

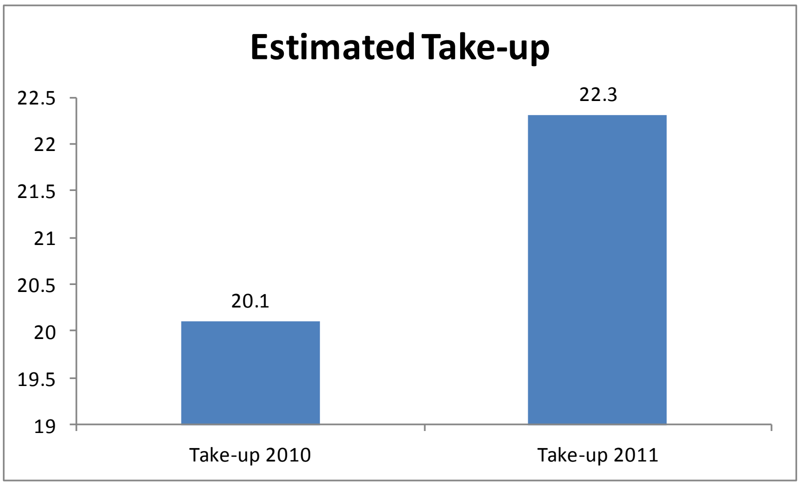
Table 24 Estimate of e-Procurement Take-Up — Ireland (€Million)

Ireland	2010	2011	Growth 2011/2010
General gov procurement	18,992	17,077	-10.1%
e-Procurement	3,824	3,801	-0.6%
Take-up	20.1%	22.3%	10.5%

Source: IDC, 2013

[26] Source: Table 28, "The 266 e-Procurement Entities Population by MS", page 109, D1-e-Procurement Landscape Report
[27] http://www.e-tenders.ie/

Figure 11 Estimate of e-Procurement % Take-Up in Ireland (minimum estimate)



Source: IDC, 2013

Table 25 Data Sources — Ireland

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet for accessing tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	39% (2011) 43% (2012)
Enterprise Ireland 2011 report, the National Procurement Service presentation at the "National Procurement Conference" in 2012	2010–2011

Source: IDC, 2013

3.10.2. Validation Results: Validated

The estimate was sent to:

- The Office of Public Works, which validated it.

3.11. Italy

3.11.1. State of Play

According to our estimates, the value of e-Procurement in Italy was €3,402 million in 2011, corresponding to approximately 2.03% take-up (Table 26). In the EU27 e-Procurement ranking, Italy ranks 7th in value and 12th in take-up level. e-Procurement decreased by 38.8% in value from 2010 to 2011, mainly due to a temporary halt in activity by Consip, the national platform, in 2011, because of the change of the technical system. According to Consip, in 2012 take-up increased again over and beyond the level of 2010. In the case of Sintel, Lombardy's platform, there was also a moderate decrease, because in 2010 the platform had processed a few particularly relevant calls for tenders for hospitals, which were not repeated in 2011.

However, these considerations show that e-Procurement in Italy is still marginal, too dependent on a limited number of actors. Since Italy was one of the few countries to launch an e-Procurement strategy with a national platform at the start of the decade, the current level of take-up is disappointing.

To calculate the higher range estimate, we have assumed a 9% increase in the value of e-Procurement in 2010 and of 29% in 2011, driven by the other e-Procurement platforms, on which we have limited data.

The estimate is based on:

- Extrapolation of data provided by the two main platforms responding to the value questionnaire and other data provided by Polytechnic of Milano;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, based on interviews with the leading platforms, the experts from Polytechnic of Milano;
- The level of development of the offering infrastructure (15 e-Procurement entities, of which 11 offer e-Submission[28]);
- The share of enterprises using the Internet for public e-Procurement is among the lowest in Europe (Eurostat), both in 2011 and 2012.

Compared to the size of the population, Italy's e-Procurement infrastructure is less developed than in France and Germany. There is a limited presence of private platforms, probably due to the reluctance of Contracting Authorities at all levels to engage fully in electronic procurement processes. However, the national public infrastructure of e-Procurement is well developed and based on platforms operating both at national and regional levels.

Since 2006, national Contracting Authorities are obliged to use framework contracts managed by Consip, running the platform Acquisti in Rete[29] for the procurement of office supplies and services, and to use MEPA (the national electronic marketplace) for purchases below the EU threshold. A Decree of June 2012 extended the obligation to all categories of goods and services.

E-Submission is voluntary for regional and local administrations. Some regional/local administrations have mandated the use of e-Procurement:

- Lombardy[30] for regional Contracting Authorities and healthcare authorities;
- Emilia Romagna[31] for regional Contracting Authorities and healthcare authorities;
- The Province of Bolzano[32] for the provincial authorities.

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[28] Source: Table 28, "The 266 e-Procurement Entities Population by MS," page 109, D1-e-Procurement Landscape Report

[29] https://www.acquistinretepa.it/

[30] www.centraleacquisti.regione.lombardia.it

[31] http://www.intercent.it/

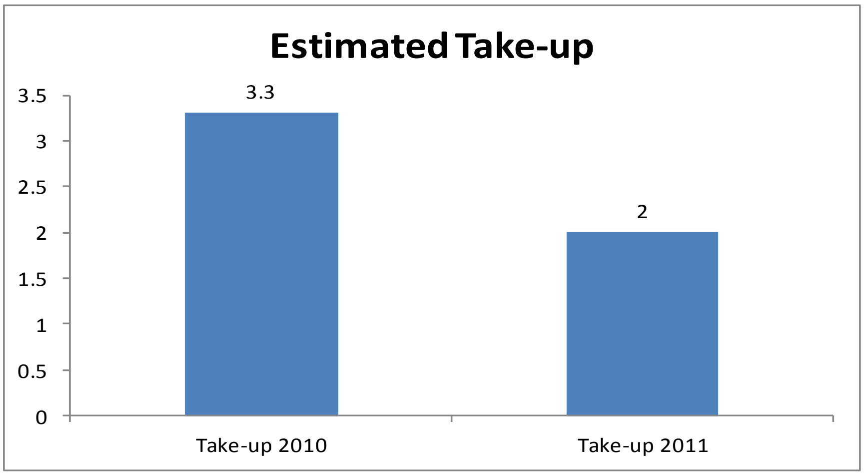
[32] http://www.ausschreibungen-suedtirol.it/

Table 26 Estimate of e-Procurement Take-Up — Italy (€Million)

Italy	2010	2011	Growth 2011/2010
General gov procurement	168,444	168,225	-0.1%
e-Procurement	5,560	3,402	-38.8%
Take-up	3.3%	2.0%	-38.7%
Additional e-Procurement value for high-range estimate	*500*	*1,000*	
Total e-Procurement value — high range estimate	*6,160*	*4,402*	

Source: IDC, 2013

Figure 12 Estimate of e-Procurement % Take-Up in Italy (minimum estimate)



Source: IDC, 2013

Table 27 Data Sources — Italy

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	15% (2011) 18% (2012)
e-Procurement value surveys filled in by platforms Consip — Acquistinrete and Sintel — Centrale Acquisti Lombardia e-Procurement	2010–2011
Published data by the Intercent-ER CPB and platform, the Bolzano Province Platform	2011
Report by MIP-Politecnico Observatory on e-Procurement in Italy (2010) and interviews with the authors	2009–2010

Source: IDC, 2013

3.11.2. Validation Results — Unable to Validate for Lack of Official Data

The estimates were sent to:

- Consip
- Centrale Acquisti Regione Lombardia
- MIP Polytechnic, responsible of the Observatory on e-Procurement

They agreed that the estimates were reasonable for Italy's context, even if none of them was able to validate them for lack of official data and full visibility.

3.12. Lithuania

3.12.1. State of Play

According to our estimates, the value of e-Procurement in Lithuania was €1,997 million in 2011, corresponding to approximately 54.9% take-up (Table 28). In the EU27 e-Procurement ranking, Lithuania ranks 9th in value and first in take-up level, which is amazing for such a small country. E-Procurement more than doubled from 2010 to 2011 in value. According to the country's own estimate, based on a narrower definition of government procurement, take-up is at 75.7%. The calculation of e-Procurement value comes from the Public Procurement Office, whose officers confirmed that all these contracts were processed with e-Submission, according to the definition of this study.

The estimate is based on:

- Official Data from the National Platform run by the Ministry of Regional Development, validated by representatives of the Ministry;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The level of development of the offering infrastructure (2 public e-Procurement entities, focused on pre- and post-award);
- The share of enterprises using the Internet for public e-Procurement was higher than the EU average in 2011 and 2012 (Eurostat).

Lithuania has a single centralised e-Procurement system, which is run with different entry points (web interfaces) depending on the type of service. The Central Public e-Procurement Portal[33] is part of the Central Public Procurement Information System[34].

National law set mandatory take-up targets: Contracting Authorities have to host e-tendering (which includes e-notification, e-Submission and e-awarding) through the Central Public Procurement Information System for at least 50% of their total procurement value per year. If this target is achieved, then from January 2014 e-Submission will be requested for at least half of competitions.

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[33] www.cvpp.lt
[34] https://pirkimai.eviesiejipirkimai.lt/

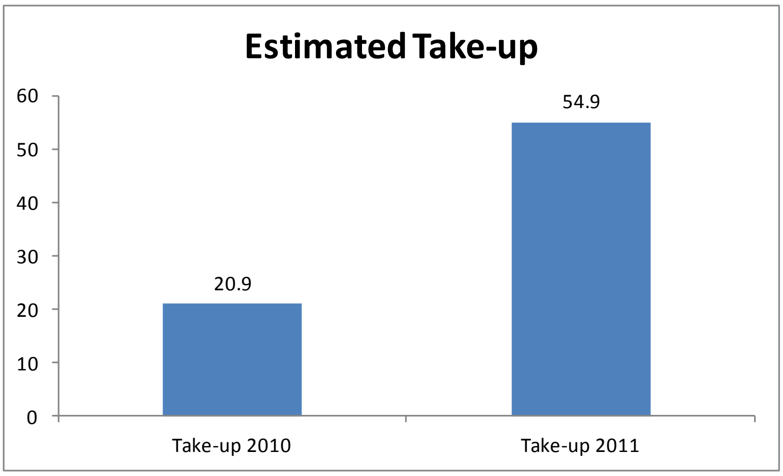
The Central Project Management Agency (CPMA) establishes framework agreements for the Contracting Authorities. CPMA has been the central purchasing body in Lithuania since January 1, 2013.

Table 28 Estimate of e-Procurement Take-Up — Lithuania (€Million)

Lithuania	2010	2011	Growth 2011/2010
General gov procurement	3,560	3,640	2.2%
e-Procurement	743	1,997	168.8%
Take-up	20.9%	54.9%	162.9%
Public procurement calculated by country		*2,663*	
Take-up calculated by country		*75.7%*	

Source: IDC, 2013

Figure 13 Estimate of e-Procurement % Take-Up in Lithuania (minimum estimate)



Source: IDC, 2013

Table 29 Data Sources — Lithuania

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	27% (2011) 30% (2012)
Data from the website of the National Procurement Platform	2010–2011

Source: IDC, 2013

3.12.2. Validation Results: Validated

The estimates were sent to:

- The Public Procurement Office, which confirmed that the data was correct and that our estimate was valid.

3.13. Malta

3.13.1. State of Play

According to our estimates, the value of e-Procurement in Malta was €6 million in 2011, corresponding to approximately 1.0% take-up (Table 30), which is still very low. In the EU27 e-Procurement ranking, Malta ranks 19th in value and 15th in take-up level. It launched a new public platform, which started e-Submission in the second part of 2011.

The estimate is based on:

- Official Data from the Department of Contracts and their answer to the Value survey;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The level of development of the offering infrastructure (only one public e-Procurement platform);
- The high share of enterprises using the Internet for public e-Procurement was higher than the EU average in 2011 and 2012 (Eurostat).

Malta is a very small country; the e-Procurement strategy is focused on the development of the centralised public procurement infrastructure. E-Submission has become mandatory since January 1, 2013.

Malta has built a sophisticated platform, EPPS[35], which is designed to eventually become the single electronic procurement platform for all tenders issued by government departments and public organisations. The EPPS is operated by the Department of Contracts with the support of the Malta Information Technology Agency (MITA).

Currently, Malta is still in a transition phase so there are still government departments and organisations that issue tenders in the traditional manner; however, in the short to medium term they will also have to make the shift to e-Procurement.

On the other hand, some organisations such as MITA are also planning to introduce post-award services, including e-Ordering, e-invoicing and e-payment, whereas few major corporations (Schedule 5 Authorities, Enemalta Corporation and the Water Services Corporation) deal with public procurement autonomously, but will converge on EPPS in the short term.

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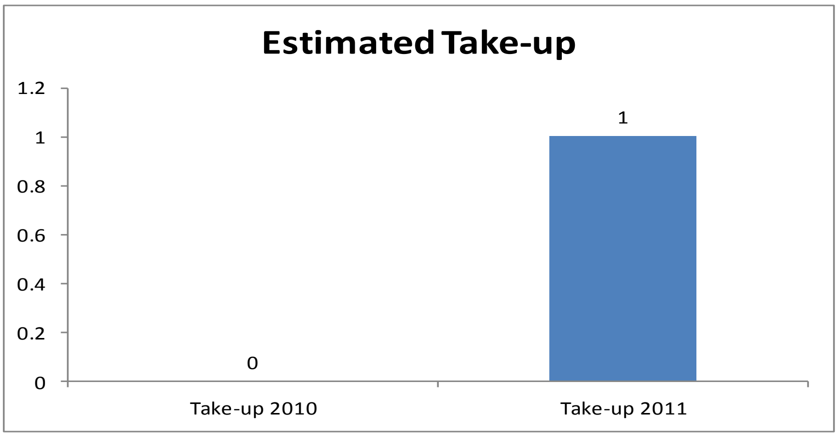
[35] https://www.etenders.gov.mt/epps/home.do

Table 30 Estimate of e-Procurement Take-Up in Malta (€Million, Minimum estimate)

Malta	2010	2011	Growth 2011-2010
General gov procurement	550	624	13,4%
e-Procurement	-	6	0
Take up	0.0%	1.0%	100%

Source: IDC, 2013

Figure 14 Estimate of e-Procurement % Take-Up in Malta (minimum estimate)



Source: IDC, 2013

Table 31 Data Sources — Malta

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	35% (2011) 35% (2012)
Data from the website of the National Procurement Platform and from the value questionnaire compiled by the public platform	2010–2011

Source: IDC, 2013

3.13.2. Validation Results — Validated

The estimates were sent to:

- Department of Contracts that provided additional data and clarification and eventually confirmed the estimate.

3.14. Poland

3.14.1. State of Play

According to our estimates, the value of e-Procurement in Poland was €175 million in 2011, corresponding to approximately 0.3% take-up (Table 32), still very low. In the EU27 e-Procurement ranking, Poland ranks 15th in value and 18th in take-up level. However, the value of e-Procurement increased dramatically by almost four times from 2010 to 2011.

The estimate is based on:

- Extrapolation of data from the Public Procurement Office and their answer to the value survey, including also the value of e-auctions.
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country.
- The level of development of the offering infrastructure (six e-Procurement entities, of which two offer e-Submission).
- The share of enterprises using the Internet for public e-Procurement was higher than the EU average in 2011 and 2012 (Eurostat).

Poland is discussing a new e-Procurement strategy in the governmental Committee for Digitalisation.

The Public Procurement Office is responsible of the public e-Procurement platform[36], which provides pre-award services and e-Auction services. e-Submission is available and voluntary; there are no obligations for CA so far.

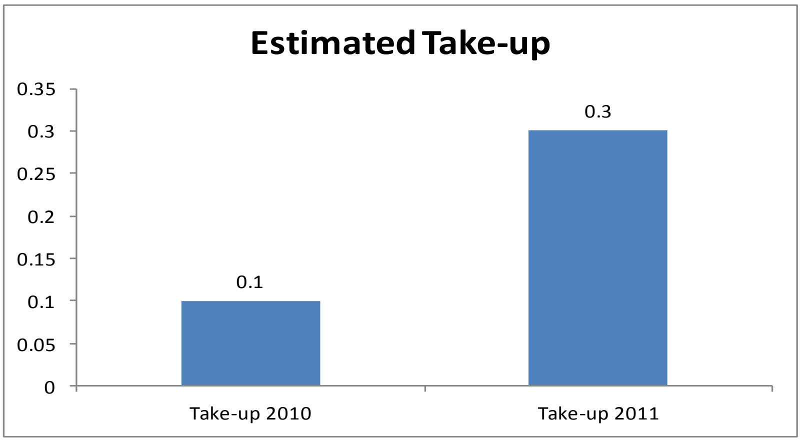
Table 32 Estimate of e-Procurement Take-Up in Poland (€Million, Minimum estimate)

Poland	2010	2011	Growth 2011-2010
General gov procurement	49,759	50,636	1.8%
e-Procurement	39	175	353.6%
Take-up	0.1%	0.3%	345.7%

Source: IDC, 2013

[36] http://www.uzp.gov.pl/cmsws/page/?F;239

Figure 15 Estimate of e-Procurement % Take-Up in Poland (minimum estimate)



Source: IDC, 2013

Table 33 Data Sources — Poland

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	25% (2011) 27% (2012)
Value Questionnaire by the Public Procurement Platform	2010–2011

Source: IDC, 2013

3.14.2. Validation Results: No Answer

The estimates were sent to:

- The Public Procurement Office, which did not provide an official answer.

3.15. Portugal

3.15.1. State of Play

According to our estimates, the value of e-Procurement in Portugal was €8,282 million in 2011, corresponding to approximately 40.7% take-up (Table 34). In the EU27 e-Procurement ranking, Portugal ranks 4th in value and 2nd in take-up level, after Lithuania. The value of e-Procurement increased by only 1% from 2010 to 2011, but at the same time the overall volume of public spending decreased by 13%, so take-up increased. According to the country's own estimates, based on a narrower definition of government procurement than Eurostat, take-up was at 75% already in 2010. This is the result of Portugal's strong proactive policy of mandatory e-Procurement.

The estimate is based on:

- Extrapolation of data from Public Procurement reports and from ESPAP, the managing entity of the mandatory National System for Public Procurement (SNCP);

- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The good level of development of the offering infrastructure (10 e-Procurement entities, of which 8 offering e-Submission);
- The share of enterprises using the Internet for public e-Procurement was aligned with the EU average in 2011 and 2012 (Eurostat).

E-Procurement has been a strategic goal for Portugal since 2003, and in that year a National e-Procurement Plan (PNCE) was launched. E-Procurement is now reflected in the national law (Code for Public Contracts — CCP and Portaria no. 701-A/2008), which made e-Tendering and e-Awarding mandatory for all procedures above €5,000 since November 1, 2009. The thresholds for centralised procurements are above €75,000 for goods and services and €150,000 for public works.

To ensure availability, the Portuguese government developed a regulated market for private e-Procurement platforms, which must be formally certified by a different public body with no other involvement in public procurement. All Contracting Authorities, including ESPAP, are obliged to use one of the certified e-platforms, at least for the open procedures. Eight certified e-platforms are currently listed in Portal BASE[37]. In addition, national Contracting Authorities must use centralised framework agreements for common goods and services when available (currently 16 categories of goods and services). For these contracts, Contracting Authorities must use the ESPAP platform[38].

The government has organised a monitoring system through the Portal BASE collecting all data about e-Procurement, even if the system is not yet fully monitoring the drivers, barriers and benefits of adoption.

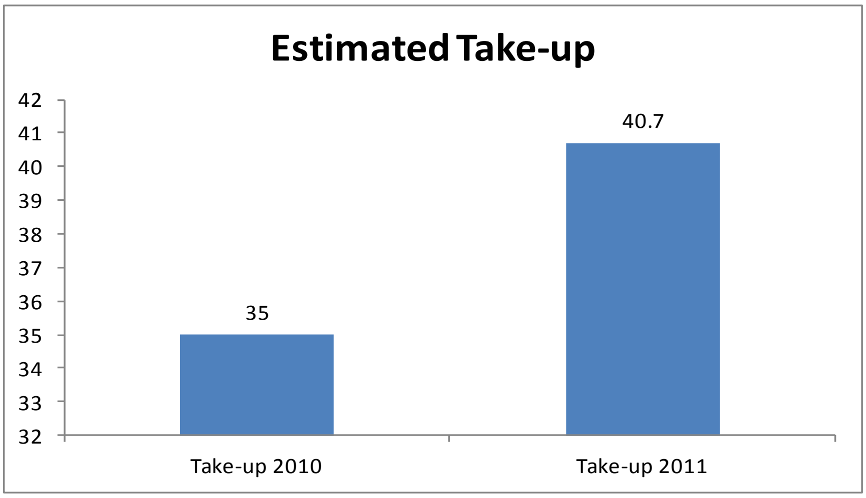
Table 34 Estimate of e-Procurement Take-Up — Portugal (€Million, Minimum estimate)

Portugal	2010	2011	Growth 2011/2010
General government procurement	23,442	20,361	-13.1%
e-Procurement	8,200	8,282	1.0%
Take-up	35.0%	40.7%	16.3%
Public procurement calculated by country	*10,958*		
Take-up calculated by country	*75%*		

Source: IDC, 2013

[37] http://www.base.gov.pt/base2/html/plataformas/plataformascertificadas.shtml
[38] http://www.espap.pt

Figure 16 Estimate of e-Procurement % Take-Up in Portugal (minimum estimate)



Source: IDC, 2013

Table 35 Data Sources — Portugal

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	21% (2011) 22% (2012)
The e-Procurement Value survey filled in by ESPAP and INCI, the "Public Procurement Portal" 2011 report	2010–2011

Source: IDC, 2013

3.15.2. Validation Results — Validated

The estimate of e-Procurement take-up was sent to:

- The Institute of Construction and Real Estate (Institute da Construção e do Imobiliário), the Ministry of Economy and Employment and to the Direction of Public Procurement (Direção de Compras Públicas). They validated the results.

3.16. Romania

3.16.1. State of Play

According to our estimates, e-Procurement was worth €1,049 million in Romania in 2011, corresponding to approximately 6.4% take-up (Table 36). In the EU27 e-Procurement ranking, Romania ranks 8th in value and 13th in take-up level. The value of e-Procurement increased by 6.4% from 2010 to 2011, but at the same time the overall volume of public spending increased, so take-up decreased slightly.

The estimate is based on:

- Extrapolation of data from the National Authority for Regulating and Monitoring Public Procurement (NARMPP);

- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The level of development of the offering infrastructure (three e-Procurement entities, of which one, the national public platform, offering e-Submissions);
- The share of enterprises using the Internet for public e-Procurement was lower than the EU average in 2011 and 2012 (Eurostat).

Romania started its development of e-Procurement in 2005, as part of the Public Procurement Reform Strategy. A 2010 government ruling specified that Contracting Authorities must use electronic means (e-notification, e-auction, and e-tendering) in awarding procedures for at least 40% of the value of their annual purchases. The public infrastructure is based on the Electronic System for Public Acquisitions[39] (SEAP, after the Romanian acronym Sistemul Electronic de Achizitii Publice), managed by the Agency for Information Society Services (ASSI). The presence of private platforms seems to be limited. The mandatory platform e-Licitatie serves as the single point for electronic publication and e-auctions.

Romania has a strong focus on e-auctions; the national platform processed public contracts offline with e-auction as the final phase for a value of €2,965 million in 2011, twice as much as the value of contracts processed with e-Submission in the same year. In this case, we considered those public contracts as processed offline because the first part of the tendering process was done offline, including sending the tenders, while the final selection of the winner was done with an e-auction based on electronic submission of prices. This value is not included in the current estimate.

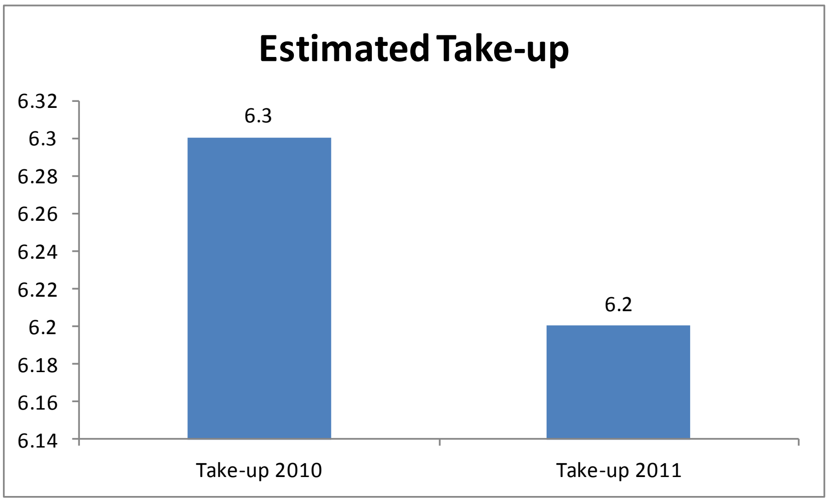
Table 36 Estimate of e-Procurement Take-Up in Romania (€Million, minimum estimate)

Romania	2010	2011	Growth 2011/2010
General gov procurement	15,716	16,887	7.4%
e-Procurement	986	1,049	6.4%
Take-up	6.3%	6.2%	-1.0%

Source: IDC, 2013

[39] http://www.e-licitatie.ro/Public/Common/Content.aspx?f=PublicHomePage

Figure 17 Estimate of e-Procurement % Take-Up in Romania (minimum estimate)



Source: IDC, 2013

Table 37 Data Sources — Romania

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	16% (2011) 19% (2012)
National Authority for Regulating and Monitoring Public Procurement	2010–2011

Source: IDC, 2013

3.16.2. Validation Results — Validated

The estimate of e-Procurement take-up was sent to:

- National Authority for Regulating and Monitoring Public Procurement (NARMPP) provided further clarifications and validated.

3.17. Spain

According to our estimates, the value of e-Procurement in Spain was €824 million in 2011, corresponding to 0.7% take-up (Table 38). In the EU27 e-Procurement ranking, Spain ranks 14th in value and 16th in take-up. e-Procurement increased sharply from 2010 to 2011 by 14.2% in value.

The estimate is based on:

- Extrapolation of limited data from the national public platform PLACE, the regional platforms of Pais Vasco and Catalunya;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country, based on interviews with government representatives and experts;

- Public reports (the e-Procurement Manual by INTECO) and the Public Procurement Observatory website;
- The level of development of the offering infrastructure (at least e-Procurement entities, of which six offered e-Submission[40]) which seems to be inadequate, given the size of the economy;
- The share of enterprises using the Internet for public e-Procurement was lower than the EU average in 2011 and even decreased in 2012 (Eurostat).

Spain has no mandatory policy for e-Procurement. The e-Procurement Coordination Department of the Ministry of Finance oversees the operational plans of development of the national e-Procurement infrastructure, which includes PLACE[41] for the pre-award phase and CONECTA Patrimonio[42], a specialised system focused on framework agreements providing pre- and post-award services. It works as an electronic marketplace providing e-catalogues. So far, more attention has been paid to developing the e-marketplace system than to implementing e-Submission for national contracts.

Public procurement is highly decentralised; only a few regions and municipalities seem to have set up an e-Procurement platform, however, including Pais Vasco[43], Catalunya[44] and the city of Madrid[45]. According to our interviews, though, also these platforms see very little activity beyond e-notification, which is fully implemented. Many Contracting Authorities and enterprises are not ready to migrate to fully electronic processes. An acceleration of e-Procurement investments and diffusion does not seem to be a priority of the Spanish government, even if the potential savings of the concentration of public purchases is well appreciated and promoted (though not necessarily through electronic technologies).

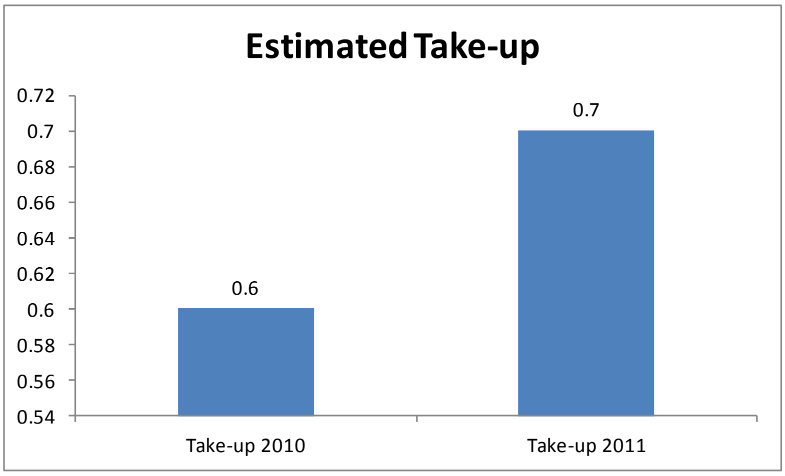
Table 38 Estimate of e-Procurement Take-Up in Spain (€Million, Minimum Estimate)

Spain	2010	2011	Growth 2011/2010
General gov procurement	131,199	117,685	-10.3%
e-Procurement	722	824	14.2%
Take-up	0.6%	0.7%	27.3%

Source: IDC, 2013

[40] Source: Table 28, "The 266 e-Procurement Entities Population by MS," page 109, D1-e-Procurement Landscape Report
[41] http://contrataciondelestado.es/
[42] http://catalogopatrimonio.minhap.es/
[43] www.contratacion.euskadi.net/w32-home/eu/
[44] https://contractaciopublica.gencat.cat
[45] http://www.madrid.org/contratospublicos

Figure 18 Estimate of e-Procurement % Take-Up in Spain (Minimum Estimate)



Source: IDC, 2013

Table 39 Data Sources — Spain

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	22% (2011) 14% (2012)
The e-Procurement Manual by INTECO and the Public Procurement Observatory website	2010–2011
data from the national public platform PLACE, the regional platforms of Pais Vasco and Catalunya	2010–2011

Source: IDC, 2013

3.17.1. Validation Results: No Answer

The e-Procurement estimates were sent to:

- Ministry of Industry and Public Administration, and to Pedro Gato, independent consultant, but we received no answer.

3.18. Sweden

3.18.1. State of Play

According to our estimates, the value of e-Procurement in Sweden was €21 billion in 2011, corresponding to approximately 33.5% take-up (Table 40). In the EU27 e-Procurement ranking, Sweden ranks 3rd in value and 3rd in take-up level, in the little group of MS where e-Procurement has a relevant diffusion. E-Procurement increased sharply from 2010 to 2011 by approximately 16.7% in value.

The estimate is based on:

- Extrapolation of data from the Swedish Procurement Services and the Swedish Association of Local Authorities and Regions;

- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The existence of a well-developed offering infrastructure (nine e-Procurement entities, of which four offer e-Submission[46]);
- A proportion of enterprises using the Internet for public e-Procurement higher than the EU average (Eurostat), with good growth dynamics from 2011 to 2012.

Sweden has a very decentralised e-Procurement ecosystem, characterised by a strong presence of private operators and no mandatory provisions. The high uptake of e-Procurement has been driven by the Contracting Authorities demand. The government focused first in developing post-award services, such as e-Ordering and e-invoicing (e-invoices are mandatory since 2008). However, the e-Government Action Plan to be concluded in 2014 includes the development of a national infrastructure for e-Procurement offering pre-award services. All governmental agencies will introduce e-Ordering in 2013, except small agencies with fewer than 50 employees.

There is no mandatory national public platform, but the task of Avropa[47], the National Procurement Service, is to supply procuring entities with coordinated framework agreements for goods and services of general use and to supply coordinated framework agreements at national, regional, and local level within the area of ICT and telecoms.

Many municipalities and county councils/regions have e-Procurement and have started it on a voluntary basis in the past 10 years.

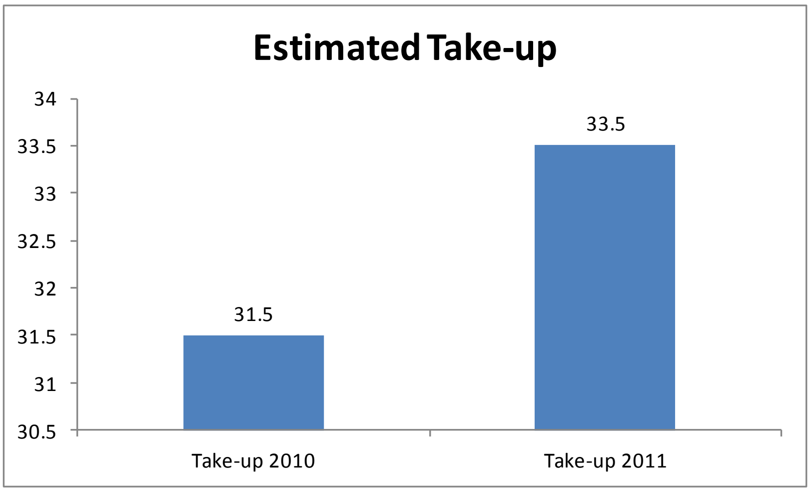
Table 40 Estimate of e-Procurement Take-Up (€Million, Minimum Estimate)

Sweden	2010	2011	Growth 2011/2010
General gov procurement	57,065	62,732	9.9%
e-Procurement	18,000	21,000	16.7%
Take-up	31.5%	33.5%	6.1%

Source: IDC, 2013

[46] Source: Table 28, "The 266 e-Procurement Entities Population by MS," page 109, D1-e-Procurement Landscape Report
[47] http://www.avropa.se/

Figure 19 Estimate of e-Procurement % Take-Up in Sweden (Minimum Estimate)



Source: IDC, 2013

Table 41 Data Sources — Sweden

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	27% (2011) 32% (2012)
Studies by Sveriges Kommuner och Landsting and Kammarkollegiet (www.upphandlingsstod.se/rapporter).	2011–2012

Source: IDC, 2013

3.18.2. Validation Results: Validated

The e-Procurement estimates were sent to:

- Swedish Procurement Service and the Swedish Association of Local Authorities and Regions which validated the estimates.

3.19. United Kingdom

3.19.1. State of Play

According to our estimates, the value of e-Procurement in the UK was €78,661 million in 2011, corresponding to approximately 30.5% take-up (Table 42). In the EU27 e-Procurement ranking, the UK ranks first in value and 4th in take-up level, in the little group of MS where e-Procurement has relevant diffusion. E-Procurement increased by approximately 7.5% in value from 2010 to 2011, against a decrease of total public spending of minus 2.9%.

To calculate the higher range estimate, we have hypothesised that the value of British e-Procurement could be higher by €5 billion in 2010 and €7 billion in 2011, corresponding to 7% and 9% of the value in the same years. This falls within the range of estimates given by our expert.

The estimate is based on:

- An ad-hoc study by an expert, Peter Smith[48], including interviews with e-Procurement managers across the England;
- Data from Scotland, Wales and Northern Ireland regional platforms, as well as GPS;
- A qualitative assessment by IDC of the dynamics of e-Procurement adoption in the country;
- The existence of a well-developed offering infrastructure (38 e-Procurement entities identified by the study, of which 26 offer e-Submission[49] — but there are many more).
- A proportion of enterprises using the Internet for public e-Procurement aligned with the EU average (Eurostat) with good growth dynamics from 2011 to 2012.

The UK government has made a clear choice for a decentralised, open e-Procurement model, supporting Contracting Authorities in the selection and use of the e-Procurement service of their choice. Therefore, there is a highly diffused network of e-Procurement platforms, run by providers such as Bravosolution (serving 150 Contracting Authorities), Mercell, Vortal, EU Supply, Basware and others, particularly in England. Wales, Northern Ireland and Scotland as decentralised administrations have made a choice for a centralised regional platform model, with good results particularly in Scotland.

The Government Procurement Service[50] (GPS, formerly known as "Buying Solutions") is an Executive Agency under the Cabinet Office created in March 2011.

Overall priority is to provide procurement savings for the UK public sector as a whole and specifically to deliver centralised procurement for central government departments.

GPS runs an e-enablement strategy to support the sourcing, procurement and management of centralised deals and suppliers, only for central government procurement. However, it does not have visibility on take-up by local administrations.

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[48] Managing Director of Procurement Excellence Ltd., responsible of the Spend Maters Blog at http://spendmatters.co.uk/

[49] Source: Table 28, "The 266 e-Procurement Entities Population by MS," page 109, D1-e-Procurement Landscape Report

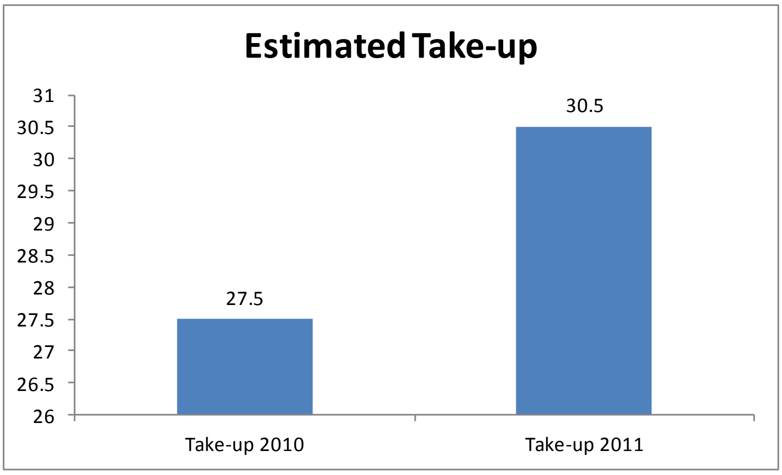
[50] https://gpsesourcing.cabinetoffice.gov.uk/sso/jsp/login.jsp

Table 42 Estimate of e-Procurement Take-Up in the UK (€Million)

United Kingdom	2010	2011	Growth 2011/2010
General gov procurement	265,792	257,993	-2.9%
e-Procurement	73,181	78,661	7.5%
Take-up	27.5%	30.5%	10.7%
Additional e-Procurement value for high-range estimate	5,000	7,000	
Total e-Procurement value — high range estimate	77,200	85,661	

Source: IDC, 2013

Figure 20 Estimate of e-Procurement % Take-Up in the UK (minimum estimate)



Source: IDC, 2013

Table 43 Data Sources — UK

Data Sources	Year
Data on public procurement published on TED	2010
% of enterprises using Internet to access tender documents and specifications in electronic procurement systems of public authorities (Eurostat)	19% (2011) 22% (2012)
The public website "Contract Finder"; the report "Lean Procurement Project Diagnostic Findings" by the Cabinet Office; reports from the Wales, Northern Ireland and Scotland public procurement entities	2010–2011
Ad-hoc report on e-Procurement in the UK by expert Peter Smith including data on public spending from: Local Government Association, Healthcare Treasury Procurement Capability Review, GPS Spending Review, National Audit Office on Police and Emergency Spending	2010–2011

Source: IDC, 2013

3.19.2. Validation Results — No Answer

The estimates were sent to:

- Scottish Procurement & Commercial Directorate — validated the Scottish data only.
- GPS UK — no answer
- Bravosolution — not authorised to share data owned by its CA clients.

3.19.3. Additional Data on e-Procurement

The Table 44 below shows the value and level of estimated take-up of e-Procurement by government tier, estimated by the UK report. Key messages from the UK report are:

- While there are severe difficulties in the UK (England in particular) around quantifying the use of e-Procurement in the public sector, it is clear that there has been very dramatic growth over the past five years. That can be seen from both the supply side — Bravosolution had virtually no public sector business in the UK in 2007 — and on the user side, where major organisations (both end users and central purchasing bodies) have adopted e-sourcing in the last two to three years.
- Excluding sensitive (military) contracts, and recognising that the UK has many long-term contracts (e.g. under the Private Finance Initiative) that do not often come to market. We believe that a very high proportion of spend — probably 70%/80% — is at least advertised electronically (i.e., on a website, usually on a platform designed for the purpose such as the GPS Contracts Finder, or one of the many regional or organisational-specific portals).
- Our estimate, with many caveats, is that something ***over 50%*** by value of public sector contracts tendered, excluding in particular security restricted tenders and schools purchasing, goes through electronic notification and advertising of opportunities to the market, with the ability for suppliers to respond electronically to PQQs, RFPs, and tenders.
- Across most of that spend, however, buyers are not using the full capabilities of the most advanced e-sourcing systems (e.g., the ability to evaluate and score tenders *within* the system rather than by printing tenders and doing so offline). Only the most advanced have got this far with their implementation and look to carry out whole sourcing processes "within" the system, and also to link e-sourcing with the wider procurement picture, including P2P, contract management, and programme management.
- Central government is clearly the most mature in terms of the proportion of contract value going through e-sourcing, driven by the clear e-enablement strategy of the Government Procurement Service. GPS is influencing some £10 billion a year of spend now, and all of its tendering is done through an e-

sourcing platform. For nine spend categories[51] the use of GPS contracts is mandated for all central government organisations.

- The police sector is also strong, with a history of collaboration, including forces using shared e-Procurement portals.
- Health: there are collaborative bodies such as NHS Supply Chain and the central pharmaceutical purchasing body that are advanced in their e-Procurement usage, while individual hospitals vary considerably in their use of e-sourcing.
- Education is probably the least mature sector, although there are collaborative buying organisations for universities and colleges that are e-Procurement users. Schools are not considered here in any detail, they have limited spend and even more limited use of e-Procurement.
- The market on the provider side is very dynamic in the UK Bravosolution is probably market leader across the whole sector, but other providers such as Due North, In-Tend, Proactis, Intenda, BiP, and Wax Digital have strengths, often in particular sectors, such as In-Tend in universities and Due North in Police.
- As well as the diversity of provider, the UK public sector by political choice is becoming more decentralised, as hospitals become self-governing Foundation Trusts, and more schools become Academies, free from local council control. The devolved nature of the landscape means there is no central body in England (or the UK) that claims responsibility for overall public procurement performance or improvement. Both Scotland and Wales are taking a more "joined up" approach to e-Procurement across their entire public sector. They have the advantage of being much smaller, which makes this sort of co-ordination easier than in England, but there also appears to be more political willpower to act in this integrated manner.
- Although there has been little cross-sector work, there have been moves to aggregate and consolidate spend in some sectors, principally central government but also elsewhere. This does mean that a few buying organisations — GPS, the regional local Authority and university consortia/buying organisations, and NHS Supply Chain — do handle some £20 billion a year between them through their contracts. Moreover, as professional procurement bodies, they tend to be full adopters of e-Sourcing.
- There are groupings of users that share a portal for advertising and often basic e-Sourcing. They exist particularly in local government, police and university sectors. However, the providers of the software are sensitive about reporting

[51] Energy, Office solutions (stationery, office equipment and related services), Professional services (including management consultancy, interims staff, legal services) Travel (hotels, trains, car hire, air etc.) , Fleet (cars, commercial vehicles) , Learning and development, ICT commodities (hardware and software, but not complex services including outsourcing) , Advertising and media, Print and print management

information to anyone other than the users, and do not habitually collect aggregated information.

Table 44 Estimate of Take-up of e-Procurement in the UK by Government Tier (2011)

UK Public Procurement — Estimates for 2011	£Billion	% of e-Procurement by Sector*	£Billion	€Billion
Central government (excluding Ministry of Defence and Military spending)	42	55%	23.1	26.6
Local government (county, metropolitan, unitary, district and town councils, and housing associations)	48	45%	21.6	24.9
Local government (smaller councils and entities)	12	15%	1.8	2.1
Health/drugs and NHS procurement all e-sourced	12	100%	12.0	13.8
Health/all other procurement	18	30%	5.4	6.2
Higher education institutions	8	30%	2.4	2.8
Emergency services (principally police)	5	40%	2.0	2.3
Total	145	47%	68.300	78.661

Source: IDC, 2013 * these % of e-Procurement are calculated based on the estimate of total spend by each market segment indicated in the first column. The total spend is lower than the general government spend by Eurostat, so take-up seems higher in this table.

3.20. Member States Not Estimated

In the case of Latvia, the Netherlands and Slovakia, we concluded that our tentative estimates were insufficiently reliable, since we had too little data and we did not receive valid inputs or feedback from national representatives. Therefore, we are not including them in the baseline estimate ("minimum estimate").

3.21. Latvia

3.21.1. State of Play

Latvia has a national e-Procurement platform, the Electronic Procurement System[52] managed by the State Regional Development Agency. The national e-Procurement system provides e-catalogues and e-ordering services for the management of the centralised framework agreements, as well as limited e-Submission for reopening of competition within these framework agreements. The plan is to offer e-

[52] https://www.eis.gov.lv/

Submission for all procedures in the future. Multiple framework agreements are established with different suppliers to ensure a competitive marketplace. e-Payment services are offered on another platform.

According to the Procurement Monitoring Bureau, therefore, e-Submission is potentially available, but no contracts were processed in the pre-award phase with e-Submission in 2010–2011. We did not have sufficient data to estimate the value of contracts processed with e-ordering, or with other services (e-auctions, for example) in the analysed period. Therefore we did not estimate the value of take-up, even though it is likely to be marginal.

3.22. Netherlands

3.22.1. State of Play

In the Netherlands, the national public platform TenderNed[53] started providing e-Submission services from September 2012. After the entry into force of the new Public Procurement Act (April 1, 2013) TenderNed has become the one-stop information point.

There are at least two private platforms that did not provide data on take-up:

- Negometrix[54] — private procurement platform
- Epos BV[55] — advertising portal specialised in e-notification

For the sake of the calculation of the higher range estimate, we assumed (even lacking data) that the Netherlands could have a take-up of 6% in 2010 and 7% in 2011, on private platforms (Table 45). This assumption is quite optimistic, but is based on the high level of development of e-government in the Netherlands and on the 16% of Dutch enterprises claiming to use the Internet to "access tender documents and specifications in electronic procurement systems of public authorities," which is higher than the 13% in Belgium (where take-up is at 3.4% in 2011).

Table 45 Estimate of Take-Up of e-Procurement in the Netherlands (€M) — High Range Estimate Scenario

Netherlands	2010	2011	Growth 2011/2010
General government procurement	135,604	136,508	0.7%
e-Procurement value	8,136	9,556	17.4%
Take-up	6.0%	7.0%	16.7%

Source: IDC, 2013

53 http://www.tenderned.nl/

54 https://platform.negometrix.com/

55 www.eposbv.nl

3.22.2. Validation Results — Impossible to Validate

Request for inputs and feedback on the estimate was sent to the following entities:

- Ministry of Economic Affairs — Directorate Competition and Consume — unable to provide feedback for lack of information.
- The TenderNed representative, who is a member of the Advisory Panel, was unable to validate the estimate for lack of information.

3.23. Slovakia

3.23.1. State of Play

The attempt to elaborate an estimate of take-up was mainly based on the number of e-auctions reported by TED and a tentative guess about the possible value of e-tenders. Because of insufficient value data, the calculation of a reliable estimate was not possible.

In Slovakia, the e-Procurement infrastructure is based on the platform[56] run by the Office for Public Procurement, which offers e-Submission on a voluntary basis, but has invested more in the implementation of e-auctions. There is also a private advertising portal run by the tender service.

3.23.2. Validation Results: No Answer

The information request was sent to:

- The Slovakian Public Procurement Office, which did not provide us any feedback.

3.24. MS Without e-Submission in 2011

3.24.1. Bulgaria

In Bulgaria the take-up of e-Procurement is at 0% since e-Submission is not yet available. The national infrastructure (Central Finance and Contracts Unit — CFCU[57]) currently provides only e-notification. In June 2010, the Council of Ministers gave the CFCU in the Ministry of Finance the role of CPB for the public administration. Currently they conclude framework agreements in favour of a limited number of ministries.

The Central Procurement Body started functioning as a pilot central body with a limited number of public procurement procedures. The fully-implemented infrastructure is planned to be operative from 2014.

There are 4 e-Procurement entities identified but they only offer e-notification services.

3.24.2. Greece

Greece has a national strategy (NSFR plan: National Strategic Reference Framework 2007–2013) which also includes e-Procurement, agreed with the EU, IMF and ECB, overseeing Greek reforms. The

[56] http://www.uvo.gov.sk/
[57] www.aop.bg

Single Public Procurement Authority (SPPA) under the Ministry Development, Competitiveness and Shipping is responsible for its implementation and for developing the national public platform, which should provide all pre-award services and be deployed in 2013. The plan foresees mandatory e-Procurement for all government bodies by the end of 2013. Note that the mandatory use of e-Submission will be implemented gradually.

There are also private procurement platforms in Greece offering e-Submission but they are not being used by the public sector.

3.24.3. Hungary

Public Contracting Authorities are not practicing pre-award e-Procurement in Hungary, not including e-Submission. According to the New Public Procurement Act, the Public Procurement Authority is responsible for public procurement and for the development of the national public platform[58], which currently offers only e-notification services (which are mandatory for all Contracting Authorities).

There at least 2 private procurement platforms offering e-Submission but they are focused on the private market. Contracting Authorities in the healthcare sector have used the private platform limited to some pilot tests.

3.24.4. Luxemburg

Luxemburg's e-government plan 2010–2014 includes implementation objectives for e-Procurement. The plan is called "Plan Directeur de la mise en oeuvre des technologies de l'information au sein de l'État 2010–2014." The national public e-Procurement platform provides e-notification services and it will offer e-Submission from 2013. Until 2012, there was no e-Submission available in this country.

Luxemburg does not plan to move towards mandatory e-Submission.

3.24.5. Slovenia

There are no e-Procurement platforms in Slovenia offering e-Submission. The national portal[59] offers only e-notification services.

The Ministry of Finance has responsible for public procurement since June 30, 2012, when the Public Procurement Agency was terminated. It is unclear what future developments there might be. Since the access to EU Cohesion Funds requires metrics on public procurement and the online publishing of tenders, the government plans to monitor this data.

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[58] http://www.kozbeszerzes.hu/
[59] http://www.e-narocanje.si/

4. CONCLUSIONS ON THE STATE OF PLAY OF E-PROCUREMENT

4.1. Development Models and Take-Up

Analysing the combination of mandatory regulation and the profile and characteristics of the e-Procurement platforms, we identified a range of e-Procurement development models that are not mutually exclusive but may exist simultaneously in the same MS. We can now compare these models with the level of take-up of e-Procurement, as shown in Table 46 below.

4.1.1. Development Models

- **The first development model (CPB Driven)** is driven by central purchasing bodies, managing public centralised e-Procurement platforms. The focus of this model is on the organisation of centralised procurements with the use of Framework Agreements (FA). There are **15 MS** (**AT, BE, DE, DK, ES, FI, FR, HU, IT, LT, LV, MT, PT, SE, UK**) implementing this model. Of these, **Austria, Germany, Italy, France and Spain** have a national platform dedicated to e-ordering and the management of centralised purchases. Germany and Italy have e-marketplaces dedicated to National Contracting Authorities. This model represents a strong driver of the adoption of e-Procurement but with a somewhat limited scope: first of all, it addresses a limited population of Contracting Authorities (CA) (either national, or federal/regional if the platform is federal or regional). Second, it covers only the typologies of goods and services responding to simple, common needs. Take-up is limited to the typologies of purchases covered by active framework agreements, which in many cases do not include public works.
- **The second development model (centralised national platforms)** is a variation of the previous one, and is typical of smaller MS. It is based on the centralisation of all procurements in a single, centralised public national platform. This is the model chosen by **Cyprus, Malta, Lithuania, Luxemburg** (available since end of 2012)**, Estonia, Latvia and Ireland**. For some of these MS, e-Submission remains voluntary (Cyprus, Ireland and Luxemburg). Malta and Estonia moved to mandatory regulation in 2013, while Latvia imposes the use of the platform to national authorities for centralised procurements. **Greece** has chosen this model and is developing its national platform, which is not yet active.
- **The third development model (centralised regional platforms)** is driven by federal/regional e-Procurement platforms centralising procurements in their area of influence, with different levels of mandatory regulation. For example, in Italy Intercent-ER in region Emilia Romagna is mandatory for all local and regional Contracting Authorities, while the central procurement agency in Lombardy is mandatory for all regional healthcare organisations and regional administrations, but voluntary for all other local administrations. This model

duplicates the national/centralised platform model at regional/federal level. It exists in federal states (**Austria, Belgium**, **Germany, Spain)** and in highly regionalised states such as **Italy** and **Finland**, but we have also found it in **France** and in the devolved administrations of Scotland, Wales and Northern Ireland in the **UK.**

- **A fourth development model (voluntary based on private solutions)** is the voluntary/decentralised one, where the central government does not necessarily develop a centralised national platform but fosters the multiplication of private platforms in the country and provides centralised support and consulting. This is clearly the case of **Sweden**, **Denmark and** the **UK.** In the UK, the central government stipulated agreements with private vendors to facilitate the Contracting Authorities access to e-Procurement solutions. This model does not exclude the use of framework agreements and mandatory centralised procurements, usually for national authorities and/or some categories of common goods and services. The Netherlands has a milder version of this model, with a centralised national platform only recently developed.
- **The Eastern European model:** The Eastern European MS **Czech Republic, Hungary, Lithuania, Romania** and **Slovakia** represent another variation on these models. They all have limited or no private platforms, centralised national public platforms in a development stage, but have adopted take-up targets and favour the implementation of centralised procurements through FA. Their national public platforms tend to offer e-auctions and post-award services, particularly e-ordering/e-catalogues, which seem to be easier to adopt by their public administrations. In **Slovakia and Romania** there is frequent use of e-auctions, rather than e-Submissions. Romania's policies favour the use of e-auction in the last phase of procurements, even if they were carried out with traditional means for the previous phase. **Poland** has a mixed model, with a national platform, voluntary e-Submission, but also a strong focus on e-auctions.
- **Bulgaria** and **Slovenia** have not opted for any model at all, even though they will probably follow the path of the centralised national platform.

4.1.2. Level of Take-Up

The following matrix table examines the potential correlations between the e-Procurement development models chosen by the MS and the level of take-up. The Table 46 below shows which development models are present in each MS (see columns on the right: a '1' signifies that the model is present in the country). The first column to the left ranks the MS by level of take-up (total value of e-Procurement as a percentage of the total value of general public procurement in the country, based on the minimum estimate of take-up in 2011).

The table colours highlight 5 main groups of MS, identified on the basis of similar levels of take-up. The groups are:

- High take-up = over 11%
- Medium take-up = from 5 to 10.9%
- Low take-up = from 1 to 4.9%
- Very Low take-up = from 0.1 to 0.9%
- Inexistent take-up: = 0

Latvia, the Netherlands and Slovakia rank last in the table because the value of e-Procurement was not estimated.

The overall view does not highlight any strong causal link between a specific model and a higher level of e-Procurement take-up. However, some considerations emerge:

- Within the small group of best performers, **UK and Sweden** have chosen both the CPB driven model and the voluntary/decentralised model. In other words, they complement a push towards centralised procurement for the national government with a decentralised model for the other government tiers. **Lithuania and Ireland**, being smaller countries, focus all e-Procurement on centralised national platforms, a model which seems to work well when supported by proactive policies and efficient services. The fifth country in this group, **Portugal** has a mixed public-private model, with a strong mandatory policy, a strong national centralised platform, but also a network of decentralised private platforms submitted to a centralised authorisation regime. Actually, the capillarity and maturity of the e-Procurement infrastructure in Portugal is similar to the other leading case of diffusion — the UK. This confirms the importance of the maturity of the offering ecosystem, accompanied by strong political will.
- The group of the runners up (MS with take-up between 5% and 10.9%) includes countries that have made different choices. **Austria and Germany** have centralised platforms at the national and regional levels (being federal states): the growth dynamics of e-Procurement seem reasonable but there is still a long way to go. **Denmark** has a voluntary/decentralised model like Sweden. **Romania** is the only country in the top ten without a CPB driven model, but with a mandatory policy since 2010 for all Contracting Authorities to use e-Procurement for at least 40% of their purchases, enabled by the national platform. In this group of MS therefore, mandatory policy and public e-Procurement infrastructures seem to play a strong role.
- The third group (low take-up between 1% and 4.9%) includes MS with very different profiles and development models, so it seems difficult to find correlations. **Finland and Belgium** are countries, with both national and regional public platforms and the CPB driven model. **Malta and Estonia** are small countries with centralised national platforms, emerging mandatory policy and strong positive dynamics of e-Procurement; in the coming years, they might emulate the performance of Lithuania and

Ireland. **Italy and France** have both public and regional platforms, and proactive policies launched years ago. Unfortunately, in both countries regulatory barriers and organisational inertia are proving very strong and the growth dynamics of e-Procurement are less than they should be.

- The group of countries with up-take below 1% is varied. **Spain** has a model similar to Germany, but does not seem to be sufficiently engaged with e-Procurement yet, neither at the central government level, nor at the federal state level. **Cyprus** is following the path of Malta and Estonia, but the gravity of its financial crisis could slow it down considerably. In **Poland** and the **Czech Republic** the Eastern European model seems not to work as well as in Lithuania and Romania, possibly because there are less effective proactive policies. Poland is modernising its platform and might improve its positioning in the future. However, in these countries many public administrations have difficulties in the use of electronic procurement processes.
- Finally, the group with no e-Procurement take-up includes two different types of MS. **Luxemburg and Greece** have chosen the model focused on a centralised national platform, which is already active in the first and should be launched in 2013 in the second. So they present a good potential of development of e-Procurement. In Hungary, Slovenia and Bulgaria e-Procurement seems to have a low priority in government policies in the analysed period, and there are few signals of a possible change in this field.

In conclusion, as indicated in our conceptual model, the diffusion of e-Procurement is a complex transition, which requires the active cooperation of all stakeholders. There are many enabling conditions: a favourable regulatory environment, regulatory authorities and Contracting Authorities actively pushing for e-Procurement, a good level of development of the e-Procurement technical infrastructure, and the willing collaboration of economic operators.

Table 46 E-Procurement Development Models Compared With Take-Up

		e-Procurement Development models				
Take-up of e-Procurement 2011 (%)		CPB Driven	Centralised National Platforms	Centralised Regional Platforms	Voluntary/Decentralised model	Eastern European: e-Auctions
LT	54.9%	1	1			1
PT	40.7%	1				
SE	33.5%	1			1	
UK	30.5%	1		1	1	
IE	22.3%	1	1			
DE	10.3%	1		1		
AT	7.5%	1		1		
RO	6.2%					1
DK	5.5%	1			1	
FI	4.5%	1		1		
BE	3.4%	1		1		
IT	2.0%	1		1		
EE	2.0%		1			
FR	1.6%	1		1		
MT	1.0%	1	1			
ES	0.7%	1		1		
CY	0.6%		1			
PL	0.3%					1
CZ	0.2%					1
BG	0.0%					
EL	0.0%		1			
HU	0.0%	1				1
LU	0.0%		1			
SI	0.0%					
LV	NA		1			
NL	NA				1	
SK	NA					1

Source: IDC, 2013

ANNEXES

Glossary

e-Procurement Process		Abbrev.
Public procurement	The purchase or other forms of acquisition of public works, supplies or services, by one or more Contracting Authorities from economic operators chosen by those Contracting Authorities, whether or not the public works, supplies or services are intended for a public purpose.	
e-Procurement	e-Procurement refers to the use of electronic communications and transaction processing by government institutions and other public sector organisations when buying supplies and services or tendering public works. This includes the replacement of paper-based procedures through the procurement chain.	
e-Procurement entity	The e-Procurement entity (e-PE) plays the role of intermediary between public Contracting Authorities (public buyers) and the private large, medium and small enterprises (suppliers), by providing online procurement services.	**e-PE**
Public contract	A contract for pecuniary interest concluded in writing between a contracting body and an economic operator, which has as its object the execution of works, the supply of products or the provision of services.	
Tender processed online	Tender processed with electronic means, in the pre-award phase, up to and including at least e-Submission. This is the minimum requirement to consider a contract as processed through e-Procurement.	
e-Procurement Phases		
Pre-award	e-Procurement process phases occurring before the award of the contract: e-notification, e-access, e-Submission, e-evaluation, e-awarding.	
Post-award	e-Procurement process phases occurring after the award of the contract: e-ordering, e-invoicing, e-payment.	
e-Notification	The electronic publication of prior information notices, contract notices, and all necessary documentation enabling suppliers to apply for public procurement opportunities. This may or may not include e-awarding (the online publication of the winners of public procurement contracts). This includes notably the submission of standardised notices to the Commission for publication via the European public Procurement journal Tenders Electronic Daily (TED).	
e-Access	The publication of all necessary documents pertaining to the procurement on the web. This relates only to general documents, and not to documents that a specific economic operator may	

	require (electronic attestations and certificates, e.g. tax attestations).	
e-Submission	The submission of public procurement tenders through electronic means. This can be done with different levels of sophistication: simple sending of an email "sealed" or with a simple digital signature; uploading of a PDF file via an e-Procurement platform; uploading of the tender and completing standardised forms (downloadable or online); interaction with the e-Procurement platform; and finally through a fully interactive process with the e-Procurement platform providing guidance on the preparation and uploading of the tender for all its components.	
e-Evaluation/ **e-Awarding**	Partial (i.e. decision support) or entire automation of the assessment of bids (e-evaluation), followed by the formalisation and communication of the outcome to the tenderers (e-awarding). A fully automated assessment is by definition only possible if assessment criteria are entirely quantitative (i.e. it does not require subjective appreciation) and clearly defined.	
e-Ordering	The automatic placement of orders online, including particularly through the use of e-catalogues. e-Ordering only occurs in cases where the concluded procurement contract has established a framework (such as a framework agreement or DPS) within which supplies or services can be ordered.	
e-Invoicing	The automated process of issuing, sending, receiving and processing invoice and billing data through electronic means.	
e-Payment	Any digital financial payment involving currency transfer between a Contracting Authority and a supplier for a public procurement transaction. These transfers may be carried out by companies uploading information in specified formats to banks, either through the Internet or by transmitting data files directly to banks or their intermediaries through secured or closed networks.	
Procurement Threshold		
EU threshold	The Directive 2004/18/EC applies to public works contracts, public supply contracts and public service contracts which have a value excluding VAT estimated to be no less than the pre-established thresholds. The thresholds are recalculated by the Commission every two years. The calculation of the value of these thresholds shall be based on the average daily value of the euro, expressed in Special Drawing Rights (SDRs). This average is calculated over the 24 months terminating on 31 August for the revision with effect from 1 January. For the year 2012 the value of the thresholds is the following: €130,000 for public supply and service contract notices (applies to government departments and offices); €200,000 for public supply and service contract notices (applies to	

	regional and local authorities public bodies except for utilities sector) €5,000,000 for contract notices related to works (applies to governments department and offices regional and local authorities public body). For those Member States that have not adopted the single currency, the value of these thresholds is calculated and published by the European Commission in the Official Journal once the re-calculated thresholds in euros are published.	
National threshold	Some EU countries establish a different threshold from the EU one for their e-Procurement contracts	
	Procurement Procedures	
Competitive dialogue	A Contracting Authority may make use of the competitive dialogue for complex contracts if it is not able to define by itself the technical solutions to satisfy its needs or is not able to specify the legal and/or financial make-up of a project. Large infrastructure projects would seem to lend themselves to this type of dialogue.	
Framework agreement (and call offs)	The Directive 2004/18/EC defines the framework agreement as an agreement between one or more Contracting Authorities and one or more economic operators, the purpose of which is to establish the terms governing contracts to be awarded during a given period, in particular with regard to price and, where appropriate, the quantity envisaged. The initial agreements do not themselves create any contractual obligations, whereas call-offs under those arrangements do. It is therefore important for the agreement to set out the terms and conditions of the contractual relationships that will arise from call-offs. The call offs are the legally binding contracts between the institution and the framework supplier which defines the goods/services to be provided. They incorporate a contractual commitment to purchase a particular volume or value of goods or services. These contracts are normally formed through the placing of a specific purchase order for a quantity of goods or services following the terms set out in the Framework Agreement, under which the call off is made.	**FA**
Mini-competition	Mini-competition is the term used to describe one of the processes for selecting a supplier on a framework agreement to place a call-off contract.	
Open procedure	General invitation to tender to economic operator responding to the profile indicated in the TOR (terms of reference). The procedure can be managed through the pre-award phases of the e-Procurement process.	
negotiated procedure	In a negotiated procedure, the Contracting Authority consults the economic operators of its choice and negotiates the terms of the contract with them. This can be applied with or without prior publication of a contract notice. The negotiated procedure can be used only in specific circumstances defined by the directives, for	

	example if previous tenders received no answers, or if the price and content of the service to be procured cannot be defined beforehand.	
Restricted procedure	Two-phase procedure: open invitation, to which any economic operator may request to participate, followed by the selection of a restricted group of EO based on a comparative evaluation of the tenderer capability. This can be designed as a specific case of e-Evaluation and e-Award with several winners instead of only one winner. The short-listed EOs are invited to submit a proposal. The procedure can be managed through the pre-award phases of the e-Procurement process.	
Simplified procedure	In line with the WTO Government Procurement Agreement, the simplified procurement regime applies to all Contracting Authorities below the central government level, such as local and regional authorities. These purchasers may use a prior information notice as a means of calling for competition. If they make use of this faculty, they don't have to publish a separate contract notice before launching the procurement procedure. They may also set certain time limits in a more flexible way by mutual agreement with participants. It is included in the proposed Directive on Public Procurement.	
Electronic Procedures		
e-Auction	A repetitive process involving an electronic device for the presentation of new prices, revised downwards, and/or new values concerning certain elements of tenders, which occurs after an initial full evaluation of the tenders, enabling them to be ranked using automatic evaluation methods. The directives exclude from the scope of electronic auctions certain service contracts and works contracts having as their subject matter intellectual performances, as such performances cannot reasonably be evaluated automatically. In the e-Procurement process, e-auctions are usually handled as a tool in the e-award phase.	
Dynamic purchasing system	A completely electronic process for making commonly used purchases, the characteristics of which, as generally available on the market, meet the requirements of the Contracting Authority, which is limited in duration and open throughout its validity to any economic operator which satisfies the selection criteria and has submitted an indicative tender that complies with the specification. In essence, a DPS can be thought of as an electronic open framework agreement which can thereafter be used by that Contracting Authority to easily and electronically acquire such goods, services or works from the most favourable economic operator.	**DPS**
Direct ordering	A completely electronic process for making commonly used purchases, the characteristics of which, as generally available on the market, meet the requirements of the Contracting Authority, which is limited in duration and open throughout its validity to any	**DO**

	economic operator which satisfies the selection criteria and has submitted an indicative tender that complies with the specification.	
Electronic marketplace	Electronic marketplaces are services providing an electronic environment for the interaction between pre-qualified registered suppliers and Contracting Authorities. The marketplace presents e-catalogues of the products and services available and CA can select and e-order items (through a typical "shopping cart"). Price and delivery conditions are pre-determined. They are usually limited to below-the-threshold purchases.	**e-Marketplace**
Infrastructural Tools		
Advanced e-signature	An e-signature that additionally meets the following requirements: it is uniquely linked to the signatory; it is capable of identifying the signatory; it is created using means that the signatory can maintain under their sole control; it is linked to the data to which it relates in such a manner that any subsequent change in the data is detectable. It can be provided by: qualified public lists, released by any commercial body, incorporated in national ID framework	
e-Catalogue	Electronic documents established by suppliers which describe products and prices in a structured manner. From a technical perspective, they can take virtually any form, ranging from general text documents (e.g. in PDF or MS Word) or spreadsheets that can be consulted by any human reader, to highly standardised XML formats which can also be automatically processed in a more systematic and useful manner in certain e-Procurement systems.	
e-Certificate/e-attestation	The notion of e-certificates or e-attestations refers to documentary evidence in an electronic form which is provided by the economic operator as an addition to its own bid, and which demonstrates compliance with certain formal requirements. These documents are thus relevant for the economic operator to show its suitability to the Contracting Authority to perform procurement	
e-Identification	The process of unambiguously determining a person/entity's identity by using electronic means. In Europe many Member States provide their citizens with electronic IDs via smart cards, mobile phones, or other technologies: some Member States combine an e-ID with the function of an identity card used also as a travel document, others have a citizen card to access public online services, others work with mobile devices, or a combination of card and phone.	
e-Signature	e-Signature is the electronic equivalent of a handwritten signature. e-Signatures are defined in Directive 1999/93/EC (the e-Signatures Directive) as data in electronic form which are attached to or logically associated with other electronic data and which serve as a method of authentication.	
National ID	Identification password provided by a government organisation.	

Simplified e-ID	Simple username/password schemes based on online registration via web forms.	
Qualified digital signature	A digital signature based on a qualified certificate, i.e. a certificate issued by a certificate authority that has a national accreditation for providing those.	
Ownership and Type of Legal Entity		
Private Company	A company that has shareholders with limited liability and with shares that may not be offered to the general public.	
Private ownership	The private ownership means that the majority of the entity is owned by private entities. The ownership of CPBs is clearly public, but technology platforms can be public or private.	
Public company	A company that has issued securities to general public through an initial public offering (IPO) and is traded on at least one stock exchange or in the over the counter market. Although a small percentage of shares may be initially "floated" to the public, the act of becoming a public company allows the market to determine the value of the entire company through daily trading.	
Public ownership	The public ownership means that the majority of the entity is owned by public authorities or government bodies. The private ownership means that the majority of the entity is owned by private entities. The ownership of CPBs is clearly public, but technology platforms can be public or private.	
Public Buyers		
Central purchasing body	A Contracting Authority which acquires goods and/or services intended for other Contracting Authorities, or awards public contracts or concludes framework agreements for works, goods or services intended for other Contracting Authorities. The CPB is an intermediary organisation that adopts a technology infrastructure in order to procure online for other Contracting Authorities. Some CPB enable only framework agreements procedures. Others enable all procedures.	**CPB**
Contracting Authority	State, regional or local authorities, bodies governed by public law, associations formed by one or several of such authorities or one or several of such bodies governed by public law, subject to the European regulatory framework on public procurement.	**CA**
Contracting entity	Body governed by public law or entities operating on the basis of "special or exclusive rights" granted by a competent authority of a Member States, In summary, the relevant activities are the provision of or operation of networks for utilities: water, energy (including electricity, gas or heat and the exploitation of a geographical area for the purposes of exploring for and extracting oil, gas, coal and other solid fuels), transport services (the operation of transport networks and terminal facilities), postal	**CE**

	services.	
Economic Operators — Suppliers		
Foreign suppliers (non-domestic)	Legal entities whose legal headquarter is not based in the national market of the e-PE entity (within/outside the EU)	
SME suppliers	Enterprises, with less than 250 employees	**SME**
Suppliers	Enterprises selling goods and services transacted in the e-Procurement services. They may be national private enterprises (large/medium/small), or foreign suppliers (large/medium/small legal entities whose legal headquarter is not based in the national market of the e-PE entity, but within/outside the EU).	
Geographical Scope		
Cross-border e-Procurement	The organisation provides e-Procurement services to public buyers based in more than one EU or non-EU country.	
Local level	The organisation provides e-Procurement services to customers based in a local geography (provinces and townships — we refer to the Eurostat NUTS3 and lower)	
Federal level	The organisation provides e-Procurement services to public buyers based in the federal State/Region (we refer to the Eurostat NUTS1)	
National level	The organisation provides e-Procurement services to public buyers based anywhere inside the national burdens (we refer to the Eurostat NUTS0)	
Regional level	The organisation provides e-Procurement services to public buyers based in a region (we refer to the Eurostat NUTS 2)	
Sectoral Scope		
Education & research sector	Pre-primary, primary, secondary and tertiary education, post-secondary non-tertiary education, education non-definable by level, subsidiary services to education, R&D.	
Environmental protection sector	Waste and water waste management, pollution abatement, protection of biodiversity and landscape, related R&D.	
Defence sector	Military and civil defence, foreign military aid, R&D related to defence.	
General public service sector	General public services is one of the ten functional groups or sub-sectors of expenditure and it includes executive and legislative organs, financial and fiscal affairs, external affairs, foreign economic aid, basic research, R&D related to general public services, public debt services, transfers of a general character	**GPS**

	between different levels of government.	
Health sector	Medical products, appliances and equipment, outpatient, hospital and public health service, R&D related to health.	
Housing & community amenities sector	Housing development, community development, water supply, street lighting, R&D related.	
Public order & safety sector	Police, fire-protection services, law courts, prisons, R&D related to public order and safety.	

Source: IDC, 2012

Value Questionnaire Survey

The goal of the second survey was to collect the value data about the contracts processed at least up to e-Submission in accordance with the definition of e-Procurement used for the study (a good/service is procured online when its purchase is processed online at least up to e-Submission).

The survey responded to the Task 2.1 Analysis of the Market under the WP2 Overview of the e-Procurement Market, and the results feeds the D2 e-Procurement State of Play Report.

The script of the questionnaire was shared with the EC and finalised according to the feedback received. The data collection started at the beginning of November.

The sample of this round of data collection has been built using the e-PEs Census. We selected across the EU27 (excluding the countries where e-Submission is not available yet) all the ePEs that participated to our first online survey and both provide e-Submission and monitor the value of e-Procurement.

The starting list of targeted e-PEs was the following.

MS	Platforms	MS	Platforms
AT	Auftragnehmerkataster Österreich (ANKOE)	IT	Intercent-ER
AT	Vemap GmbH — Purchasing Management	IT	Agency for Procurement and Contracts of the Province of Trento
CY	Treasury of the Republic of Cyprus	LT	Lithuanian Public Proccurement Office
DE	xSolut GmbH	LV	State Regional Development Agency of Latvia
DE	Healy Hudson GmbH	MT	Department of Contracts of Malta
DE	iBau GmbH	PT	Vortal PT
DE	Veenion GmbH	PT	VORTAL Connecting Business
DK	Amgros I/S	PT	Gatewit
EE	Estonian Ministry of Finance	PT	AcinGov — Electronic Platform of Public Procurement
ES	DG — Spanish Ministry of Industry and Public Administrations	PT	forumB2B Electronic Market

ES	Public Procurement Portal of the Community of Madrid	SE	Swedish National Procurement Services
FI	HILMA — Julkest Hankinnat	SE	Mercell Holding AS
FI	Cloudia Ltd./Kuntahankinnat	UK	Scottish Procurement & Commercial Directorate
FI	Hansel Oy — the Central Procurement Unit of the State of Finland		
FR	BravoSolution France		
IT	Central Procurement Agency (Region Lombardia)		
IT	Consip Spa		

The Following Message Was Sent to the e-PEs

Dear Sir/Madam

First thanks again for answering to our survey on e-Procurement in Europe. We would like to ask again for your kind collaboration at this stage of the study.

We are launching a new round of data collection addressed to the organisations dealing with e-Procurement that according to our previous survey, monitor the value of their e-Procurement flows. Our goal is to estimate the total value of e-Procurement take-up in the EU27 and we would really appreciate whether we could count on your support to do this for COUNTRY NAME.

In order to collect data, we have prepared a questionnaire, attached below, where we ask the respondents to share with us the data available on e-Procurement. The data collection through this questionnaire is an input for the production of a country profile about the value estimates.

Before starting filling in the questionnaire, we would like to discuss it through a telephone interview in order to explain more in details the goal of this request, clarify any possible doubt and simplify this activity. In a way, it can be considered as an interview guide.

The questionnaire is structured with a number of sections, which includes certain types of data we are asking for, but we invite you to share with us any other type of data you have. So I would like to ask for your availability for an interview in the next days.

As a way to thank you for your precious collaboration, we would like to share with you an extract of the first Deliverable of the study, the E-Procurement Landscape Report, which we hope can be of any interest to you.

Questionnaire Script

<table>
<tr><td colspan="3">1. General Information (pre-compiled)</td><td></td><td></td></tr>
<tr><td rowspan="2">General Information</td><td>Q.1.1</td><td>Please answer the following questions always with reference to your last complete fiscal year and the year before. Please validate the reference period indicated nearby and correct if it is not right.</td><td></td><td></td></tr>
<tr><td>Q.1.2</td><td>If you use your local currency, please specify name and number scale (Thousand, Millions, Billions...).</td><td></td><td></td></tr>
<tr><td colspan="3">2. Baseline data</td><td>FY2012</td><td>FY2011</td></tr>
<tr><td rowspan="4">Baseline data</td><td colspan="2">In this section, we consider all the contracts awarded on your platform. Please specify if they include the contracts concluded within marketplaces and within FA</td><td></td><td></td></tr>
<tr><td></td><td>Please specify the type of contracts included</td><td></td><td></td></tr>
<tr><td>Q.2.1</td><td>Please tell us the total number of the contracts awarded on your platform in your last fiscal year and in the year before.</td><td></td><td></td></tr>
<tr><td>Q.2.2</td><td>Please tell us the total value of the contracts awarded on your platform in your last fiscal year and in the year before.</td><td></td><td></td></tr>
<tr><td colspan="3">3. e-Procurement take-up: indicators of the platform up to e-Submission</td><td>FY2012</td><td>FY2011</td></tr>
<tr><td rowspan="5">e-Procurement take-up</td><td colspan="2">In this section we consider all contracts awarded on your platform and processed up to the e-Submission. Please specify if you include the contracts concluded within marketplaces and FA.</td><td colspan="2"></td></tr>
<tr><td>Q.3.1</td><td>Please tell us the total number of the contracts awarded on your platform and processed with at least e-Submission</td><td></td><td></td></tr>
<tr><td>Q.3.2</td><td>Please tell us the total value of the contracts awarded on your platform and processed with at least e-Submission</td><td></td><td></td></tr>
<tr><td>Q.3.3</td><td>If you are not able to provide these data, please explain why</td><td colspan="2"></td></tr>
<tr><td>Q.3.4</td><td>Please give us any other data you have about e-Procurement value and take-up possibly for the last 2 fiscal years.</td><td></td><td></td></tr>
<tr><td colspan="3">4. e-Procurement take-up: contracts processed by e-Marketplaces, e-Auctions, DPS (Skip if you do not have)</td><td>FY2012</td><td>FY2011</td></tr>
<tr><td rowspan="9">e-Procurement take-up</td><td>Q.4.1</td><td>Please tell us the total number of the contracts processed on your platform through the e-marketplace in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.2</td><td>Please tell us the total value of the contracts processed on your platform through the e-marketplace in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.3</td><td>Please tell us the total number of the contracts processed on your platform by DPS in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.4</td><td>Please tell us the total value of the contracts processed on your platform by DPS in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.5</td><td>Please tell us the total number of the contracts processed on your platform with e-auctions in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.6</td><td>Please tell us the total value of the contracts processed on your platform with e-auctions in the last fiscal year and the one before.</td><td></td><td></td></tr>
<tr><td>Q.4.7</td><td>Please specify your definition of a contract processed through e-Marketplace, e-Auction, and DPS</td><td colspan="2"></td></tr>
<tr><td>Q.4.8</td><td>If you're not able to provide these data, please explain why</td><td colspan="2"></td></tr>
<tr><td>Q.4.9</td><td>Please give us any other data you have about e-Procurement value and take-up of electronic procedures possibly for the last 2 fiscal years.</td><td></td><td></td></tr>
<tr><td colspan="3">5.Contracting Authorities and Suppliers</td><td>FY2012</td><td>FY2011</td></tr>
<tr><td rowspan="3">CA and Suppliers</td><td>Q.5.1</td><td>Can you validate the total number of Contracting Authorities registered by your platform?</td><td></td><td></td></tr>
<tr><td>Q.5.2</td><td>How do you classify them?</td><td></td><td></td></tr>
<tr><td>Q.5.3</td><td>Do you collect other data about Contracting Authorities (for example how many use your services by type of service)? If you do, can you share these data with us?</td><td></td><td></td></tr>
</table>

	Q.5.4	Can you validate the **total number** of suppliers **registered** by your platform?		
	Q.5.5	Do you classify them by size/sector or other criteria? Do you identify SMEs?		
	Q.5.6	Do you collect **other data** about **suppliers**? If you do can you share these data with us?		
	Q.5.7	How many **contracts** were **awarded to SME** suppliers in the last fiscal year? And the year before?		
	Q.5.8	Do you collect **other data** about **contract winners**? If you do can you share these data with us?		
		6. Type of purchases (supplies, services, works)	**FY2012**	**FY2011**
Type of Purchases	Q.6.1	Considering the **total number** of the contracts awarded on your platform and processed with at least **e-Submission, can you divide them by type of purchase — supplies, services, public works, and mixed?**		
	Q.6.2	Considering the **total value** of the contracts awarded on your platform and processed with at least **e-Submission, can you divide them by type of purchase — supplies, services, public works, mixed?**		
	Q.6.3	Please specify **if you do not use** e-Procurement for some of these typologies of purchases		
		7. Main Procedures	**FY2012**	**FY2011**
Procedures	Q.7.1	Do you **monitor the contracts processed with e-Procurement by type of procedure**? Please specify how you classify them		
	Q.7.2	Please tell us the **total number** of contracts processed with at least e-Submission **by type of procedure** in the last fiscal year and the year before		
	Q.7.3	Please tell us the **total value** of contracts processed with at least e-Submission **by type of procedure** in the last fiscal year and the year before		
	Q.7.4	If you are not able to provide these data, please explain why		
	Q.7.5	Please give us **any other data** you have about e-Procurement value and take-up possibly for the last 2 fiscal years		
		8. EU threshold	**FY2012**	**FY2011**
EU Threshold	Q.8.1	What is the **total number** of the contracts awarded on your platform **above/below the EU threshold**?		
	Q.8.2	What is the **total value** of the contracts on your platform in your last fiscal year **above/below the EU threshold**? (Million Euro)		
	Q.8.3	What is the **total number** of the contracts awarded on your platform and processed with at least e-Submission **above/below the EU threshold**?		
	Q.8.4	What is the **total value** of the contracts awarded on your platform and processed with at least e-Submission **above/below the EU threshold**?		
		9. Other data collected	**FY2012**	**FY2011**