

Public Service Spend and Tendering Analysis Report 2016



Oifig um Sholáthar Rialtais
Office of Government Procurement



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

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Foreword

Foreword by the Minister for Finance and the Minister for Public Expenditure and Reform, Mr Paschal Donohoe T.D., and the Minister of State at the Department of Public Expenditure and Reform with special responsibility for Public Procurement, Mr Patrick O'Donovan T.D.

We are pleased to welcome the fourth Public Service Spend and Tendering Analysis Report of the Office of Government Procurement (OGP) which analyses expenditure data across a range of public service bodies in the State. Under the centralised procurement model established by Government an estimated €6 billion of procurement addressable spend falls within the remit of the OGP and its sourcing partners in the Health, Education, Local Government and Defence sectors.

This report analyses €4.723 billion, 79% of that public service procurement spend for 2016, across the sectors and central Government departments. The 2016 spend analysed is €189 million more than that analysed in the 2015 report and is the result of additional spend data obtained from public service bodies for 2016.

The 2016 spend data analysis indicates that 94% of the analysed expenditure is with firms within the State, unchanged from the 2015 report total.

As in previous reports the majority of the expenditure analysed is with SMEs (Small and Medium Enterprises). 53% of analysed spend for 2016 was with SMEs, one percentage point higher than 2015. Reflecting the 2015 analysis, SMEs continue to have the greater share of spend in 11 of the 16 procurement spend categories. Large companies continue to be predominant in categories such as Utilities and Defence.

This report also summarises 2016 tendering activity in the public service as recorded on the eTenders public procurement platform. The analysis shows that 76% of tender notices are smaller value (below OJEU threshold) tenders. The median (typical) estimated contract values for tenders analysed in 2016 is 20% lower than 2015 at €80,000 and is less than or equal to €100,000 in 11 of the 16 spend categories. This would indicate that Government contracts in Ireland are accessible to SMEs given the low median size of published estimated contract values.

Public procurement represents a major opportunity for SMEs. The OGP encourages SMEs to avail of that opportunity and works with Government agencies and industry representative bodies on policy initiatives and on promoting supplier education and awareness of those opportunities both in Ireland and across the EU market.

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

The spend analysis in this report, along with the analysis of tender notices published on the eTenders public procurement platform in 2016, will assist businesses to understand the opportunity afforded by public procurement in Ireland.

While the OGP has prepared the 2016 spend analysis in this report, it would not have been possible without the provision of expenditure data by public service bodies. We wish to acknowledge those organisations that furnish the OGP with spend data and contribute to increased openness and transparency on public expenditure. This data is key to the development of the procurement strategies that will deliver sustainable value for money for the State.



Mr. Paschal Donohoe, T.D.
Minister for Finance and the
Minister for Public Expenditure
and Reform



Mr. Patrick O'Donovan, T.D.
Minister of State at the Department of
Public Expenditure and Reform with
special responsibility for Public Procurement

About the Office of Government Procurement (OGP)

The Office of Government Procurement (OGP) was established by the Government to integrate procurement policy, strategy and operations into a centralised office with the aim of reducing procurement risk and enabling savings for public service bodies (PSBs) across the State. The OGP is headed by the Government's Chief Procurement Officer, and operates as an office of the Department of Public Expenditure and Reform.

The Procurement Reform Programme is a key whole-of-government programme in the overall Public Service Reform Plan. The OGP is charged with leading procurement reform and building procurement capacity and capability along with sector sourcing partners in Health, Education, Local Government and Defence – in a centralised procurement model for goods, services and minor works.

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

A key principle of the Procurement Reform Programme is that the Public Service will speak with 'one voice' to the market. Since it commenced sourcing operations in 2014 the OGP has been working to put in place sectoral or whole-of-government arrangements. Some areas of expenditure such as legal costs, software, catering and cleaning had not previously been addressed at a whole-of-government level. The OGP looks at services across PSBs and puts in place commercial arrangements that leverage scale, bring consistency and manage risk.

National procurement expenditure data is key to developing an appropriate approach to the market. It is an enabler to the development of effective procurement policies and optimal sourcing strategies. Historically, procurement was decentralised with individual PSBs making their own procurement decisions. While this is starting to change under the Procurement Reform Programme, expenditure data will continue to be held by the PSBs that purchase goods, services and works.

Since late 2013 the OGP has been engaged in a substantial project to gather source data on procurement expenditure from PSBs and create a central data repository that will support its sourcing and policy activities. The OGP has published three Public Service Spend and Tendering Analysis Reports for 2013, 2014 and 2015. This fourth report, *Public Service Spend and Tendering Analysis Report for 2016*, analyses spend and tendering activity data for 2016 providing comparisons to 2014 and 2015.

Executive Summary

This *Public Service Spend and Tendering Analysis for 2016* is the Office of Government Procurement's fourth report analysing annual expenditure and tendering activity across public service bodies (PSBs) in Ireland. One of the OGP's strategic objectives is to improve the transparency of spend across public service bodies to support more effective sourcing strategies, procurement execution and value for money.

Spend analysis in this report is based on expenditure data that has been gathered from 77 PSBs. It excludes the General Medical Services Scheme (GMS), grants to Community and Voluntary bodies, interagency payments and rent on property. The procurement addressable spend, excluding major capital projects, under the remit of the OGP and its sourcing partners in the Health, Education, Local Government and Defence sectors is estimated at €6 billion annually. 79% of this estimated procurement addressable spend amounting to €4.723 billion is analysed in this latest report.

The analysis of tendering activity is based on data from eTenders, the Government's national electronic tendering platform that is administered by OGP, excluding semi-state organisations as these bodies are not under the centralised procurement remit of the OGP.

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

- 1.** Section 2 covers the analysed spend data for 2016. Corresponding analysed spend data values for 2014 and 2015 are included in this section for reference.
- 2.** Section 3 covers analysed 2016 tendering data. Corresponding analysed tendering data values for 2014 and 2015 are included in this section for reference.

2016 Spend Analysis

The key points to note in the 2016 analysis are:

1. Total value of 2016 spend analysed (after exclusions) is €4.723 billion¹, 4% (€189m) higher than the 2015 analysed spend figure of €4.535 billion.
2. 94% of the 2016 analysed spend is within the State, unchanged from the 2015 report total.
3. Medical, Surgical and Pharmaceutical Supplies remains the largest procurement category with 17% share of analysed spend.
4. 53% of analysed spend for 2016 was with SMEs, one percentage point higher than 2015.
5. The 2016 supplier profile of 11 of the 16 procurement categories remains predominantly SME (i.e. greater than or equal to the overall 53% SME share of analysed spend).

2016 Tendering Analysis

The 2016 Tendering Analysis looks at tender and contract award notices published on eTenders by PSBs. It should be noted that, in contrast to the spend data, values in the tendering analysis are exclusive of VAT.

The key points to note in the 2016 tendering analysis compared to that for 2015 are:

1. At 3,934, the number of published tender notices analysed is 3% higher than the 3,836 analysed in 2015.
2. The estimated contract value of 2016 published tender notices is 44% higher at €6.818 billion (up from €4.747 billion in 2015) and is mainly attributable to high value tender notices in four procurement categories (Managed Services, Construction and Civils, Plant Hire and Facilities Management).
3. The average estimated value of 2016 published tender notices analysed is €1.73 million as against €1.2 million in 2015. The median (typical) estimated contract values for tenders analysed in 2016 is 20% lower than 2015 at €80,000.

¹ Due to rounding, numbers presented throughout this document may not add up precisely to the totals provided and percentages may not precisely reflect the absolute figures.

4. 76% (3,007) of tender notices analysed are below the Official Journal of the European Union (OJEU) tender thresholds, accounting for an estimated value of €622 million. This represents 9% of 2016 analysed tender estimated values. (See Appendix 2 for details of OJEU thresholds.)
5. The Construction and Civils Works category accounts for the largest share (€1.786 billion) of the total estimated contract value of published tender notices analysed with an average estimated contract value of €1.65 million and a median (typical) value of €130,000.
6. The average estimated contract value of 2016 tender notices analysed by category ranges from €8.51 million (Medical and Diagnostic Equipment and Supplies) to €120,000 (Utilities) while the median values range from €140,000 (Medical and Diagnostic Equipment and Supplies) to €30,000 (Marketing, Print and Stationery)².
7. The median estimated contract value of 2016 tender notices is less than or equal to €100,000 in 11 of the 16 procurement categories.
8. The number of 'in-year' awards published (i.e. tenders both published and awarded in 2016) is 4% higher at 879, up from 846 'in-year' awards in 2015.
9. Total in-year award notices as a percentage of tender notices published for 2016 has remained unchanged at 22%.

This 2016 report contains a 'total' 2015 awards figure as it includes award notices published since the end of 2015 in respect of tender notices published in 2015. The total number of 2015 contract award notices (1,517) is 79% higher than the in-year total of 846. The corresponding estimated contract award values have more than doubled from €1,793 billion to €4,086 billion.

²The category Plant Hire contains only one tender with an estimated contract value of €220m. Because of this single data point the average and median values for this category are also €220m. While this is valid it is of little use as an average or a median, being 25 times and 1,571 times larger than the maximum respective value of any other category. Therefore it has been decided not to include this outlier value in the commentary around average and median values by category.

Conclusion

This is the fourth OGP report analysing procurement expenditure and tendering activity across the public service. Analyses have now been done for 2013, 2014, 2015 and 2016. 79% of the estimated annual procurement addressable spend of €6 billion within the remit of the OGP and its sector sourcing partners in Health, Education, Local Government and Defence is analysed in this report.

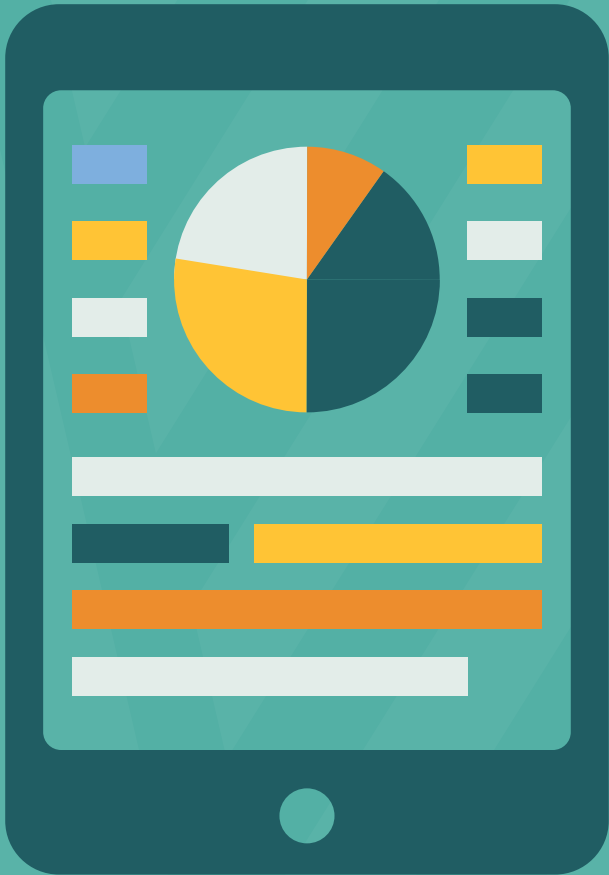
The total analysed spend for 2016 is €4.723 billion, 4% higher than the €4.535 billion 2015 analysed spend figure. 94% of the 2016 analysed spend is within the State, unchanged from the 2015 report total. The majority of the spend analysed (53%) was with SMEs. Analysed spend for 11 of the 16 procurement categories favoured SMEs (i.e. greater than or equal to the overall 53% SME share of analysed spend).

The analysis of 2016 public service tendering activity on the national tendering platform eTenders looks at 3,934 tender notices with an estimated contract value of €6.818 billion. The volume and estimated value of these tender and contract award notices are profiled by procurement category. In-year award notices account for 22% of the tender notices published for 2016.

This report contains a 'total' 2015 tender contract awards figure as it includes award notices published since the end of 2015 in respect of tender notices published in 2015. It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process. The volume of 2015 total contract award notices at 1,517 is 79% higher than the in-year number of 846. The corresponding estimated contract award values have more than doubled from €1,793 billion to €4,086 billion.

1

Introduction



1.1 About the Report Data

The *Public Service Spend and Tendering Analysis Report for 2016* report contains two types of analysis. The first is focused on addressable public service procurement spend and the second on tendering activity in the public service.

The 2016 spend analysis is based on expenditure data gathered by the OGP from 77 PSBs. These bodies are from across the five public sectors of Central Government, Education, Health, Justice and Local Government. For a full list of these bodies please see Appendix 3.

Spend data from the Department of Justice and Equality for the department and bodies under its aegis is analysed as the Justice sector. The Education sector data is from third-level institutions and does not include spend data from primary and secondary level schools. Collecting spend data from across c. 4,000 primary and secondary schools would be a complex and labour-intensive exercise as it would be to gather data from over 2,750 voluntary agencies in the Health sector. The 2016 report includes spend data from all 31 local authorities.

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

The analysis of public service tendering activity is based on 2016 publications data from eTenders, the Government's national electronic tendering platform. The analysis is dependent in the first instance on contracting authorities undertaking procurements publishing tender notices on eTenders. The 2016 tender and award notice data has been input on eTenders by various public service contracting authorities, therefore accuracy is dependent on that entered by those public service buyers.

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

1.2 Spend Data

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

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

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

Table 1.1 below shows the 2016 spend data gathered and the net spend data set for analysis. Following the exclusion of un-addressable, interagency and unclassified spend data the 2016 spend data set analysed in this report has a total value of €4.723 billion (including VAT). This represents 79% of the estimated €6 billion procurement addressable spend.

Spend Data	2014	2015	2016
	(€m)	(€m)	(€m)
Total spend data collected	6,856	13,711	21,381
Exclusions:			
Un-addressable spend	1,479	7,879	14,621
Interagency spend	1,047	743	1,399
Spend with unclassified suppliers	399	554	638
Net Spend Data for Analysis	3,931	4,535	4,723

Table 1.1: Spend Data Collected and Exclusions Applied: 2014 - 2016

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

In addition to the 16 spend categories two additional categorisations are included in the analysis - 'Capital' and 'Uncategorised'. Capital refers to expenditure on major works and is currently out of scope for the centralised procurement model. While this data was not requested from public service bodies, where provided, it has been included for completeness. Spend data under the heading 'Uncategorised' relates to expenditure that could not be allocated to one of the 16 categories. Uncategorised spend is 2% of total analysed spend. As 98% of analysed spend traceable is to a category this indicates that the categorisation taxonomy is logical.

The spend data analysed for this report has been mapped to a category but cannot at this time be codified at a product level as public finance systems typically capture payments to suppliers but not the quantities or prices of the goods or services involved.

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

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

1.3 Tendering Data

eTenders (www.etenders.gov.ie) is the Irish Government's electronic tendering platform administered by the OGP. The platform is a central facility for all public sector (i.e. public service bodies and commercial semi-state bodies - see Appendix 1) contracting authorities to advertise procurement opportunities and award notices. All tender and contract award notices are classified as either OJEU (above the thresholds that require publication in the Official Journal of the European Union) or as Non-OJEU (below those thresholds and subject to national procurement rules). eTenders displays, on a daily basis, all Irish public sector procurement opportunities currently advertised in the OJEU as well as below OJEU threshold tenders. Details of OJEU and national thresholds are at Appendix 2.

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

It is important to note that the values used in the tendering award analysis are the estimated contract values contained in the associated published tender notices. All monetary values in the tendering analysis are exclusive of VAT. It should also be noted that as the 2016 tender and award notice data is entered on eTenders by various public service contracting authorities, data quality and accuracy is dependent upon that entered by those organisations.

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

1.3.1 Tender Notices Analysed

The eTenders data analysed in this report excludes activities by Non-Public Service Bodies such as Commercial Semi-State bodies as procurement by these organisations does not fall with the operational remit of the OGP or the sector sourcing organisations.

As Table 1.2 shows, a total of 5,073 tender notices were published in 2016 by contracting authorities. As this report considers only the procurement activities of public service bodies, 1,139 tenders published by Non-Public Sector Bodies have been excluded. Tender notices that have no CPV (EU Common Procurement Vocabulary) codes are excluded as it is not possible to analyse those tender notices by procurement spend category. There are no instances of these tenders for 2016.

The volume of tender notices analysed for 2016 is 3,934, 3% higher than the 2015 figure. The estimated contract value of tender notices analysed in 2016 was 44% higher than 2015 at €6.818 billion. Section 3 of the report analyses these tender notices as Non-OJEU, OJEU and by procurement spend category.

Tender Notices	2014		2015		2016	
	Volume	Value* (€m)	Volume	Value (€m)	Volume	Value (€m)
Number of Tender Notices Published	5,440	5,591	4,999	7,281	5,073	9,631
Non-Public Service Body Tenders Notices (excluded)	1,154	2,011	1,087	2,527	1,139	2,812
PSB Tender Notices with no stated CPV Code (excluded)	165	19	76	6	0	0.0
Total Analysed	4,121	3,561	3,836	4,747	3,934	6,818

* Estimated Contract Value

Table 1.2: Tender Notices Analysed 2014 - 2016

1.4 Report Overview

This report covers two main areas of analysis:

- 1) Section 2 covers the analysed spend data for 2016. Corresponding analysed spend data values for 2014 and 2015 are included in this section for reference.
- 2) Section 3 covers analysed 2016 tendering data. Corresponding analysed tendering data values for 2014 and 2015 are included in this section for reference.

2

Public Service Spend Analysis for 2016



2.1 2016 Spend Data Analysed

The *Public Service Spend and Tendering Analysis for 2016* report analyses spend data to the value of €4.723³ billion collected from 77 public service bodies (a list of these PSBs is at Appendix 3). The 2016 total spend analysed is up €189m, 4% higher than the 2015 analysed spend figure of €4.535 billion.

Table 2.1 and Figure 2.1 give a breakdown of the 2016 €4.723 billion spend analysed across the five sectors; Central Government, Education, Health, Justice and Local Government and compares it to that of 2014 and 2015.

Sector	2014		2015		2016	
	Spend (€m) 2014	% of Total 2014	Spend (€m) 2015	% of Total 2015	Spend (€m) 2016	% of Total 2016
Health	2,283	58%	2,439	54%	2,308	49%
Local Government	810	21%	912	20%	1,151	24%
Central Government	98	2%	433	10%	603	13%
Justice	306	8%	321	7%	340	7%
Education	435	11%	429	9%	322	7%
Total Analysed Spend	3,931	100%	4,535	100%	4,723	100%

Table 2.1: Total Analysed Spend by Sector 2014 - 2016

€2.308 billion of analysed spend relates to the Health sector. At 49% this is the largest share of the analysed spend despite the total analysed being 5% lower than the 2015 figure.

Local Government sector analysed spend is €1.151 billion, 26% higher than the 2015 figure and 24% of the analysed total.

€603 million of analysed spend relates to Central Government. This is 13% of the analysed total and 39% higher than the 2015 corresponding figure.

The Justice and Education sectors each account for 7% of the total analysed spend with values of €340 million and €322 million respectively. While the Justice sector analysed spend was 6% higher than 2015, Education was 25% lower.

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

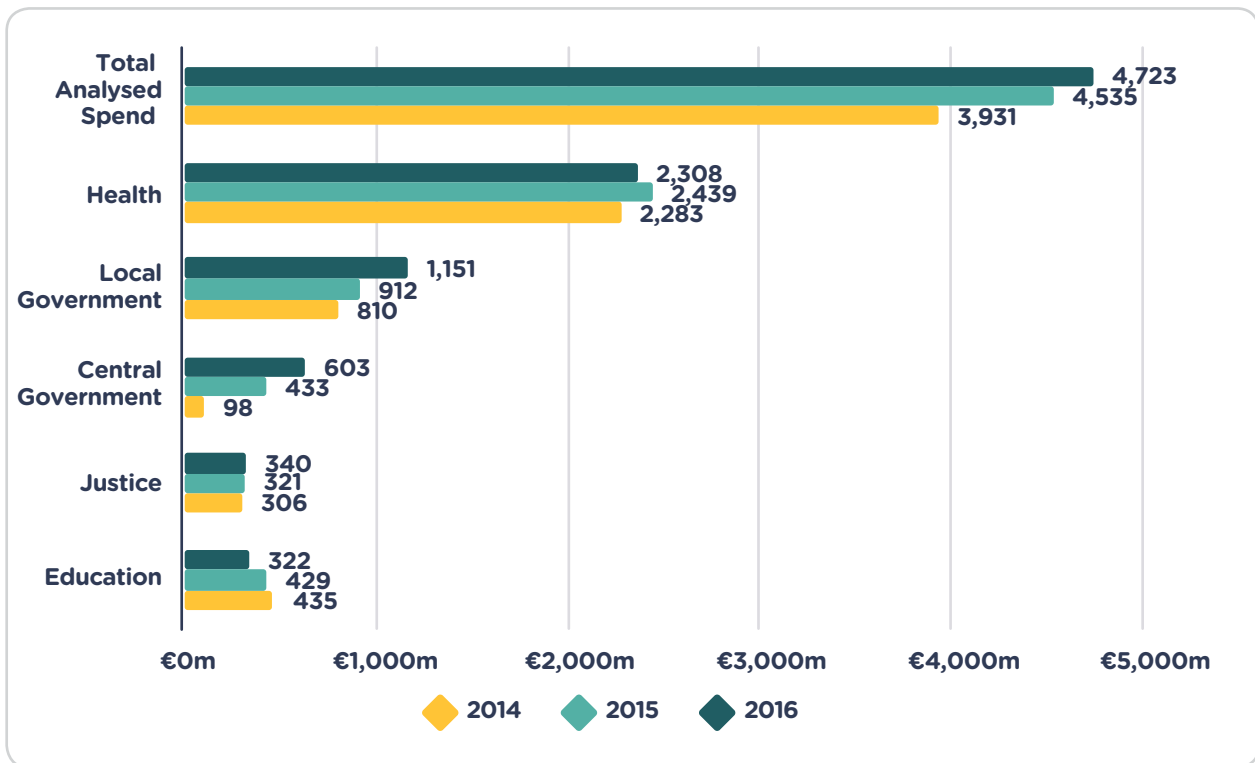


Figure 2.1: Total Analysed Spend by Sector 2014 - 2016

2.2 Spend Analysis by Category

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

Table 2.2 and Figure 2.2 show expenditure by category for 2014 - 2016. Both the table and the graph are sorted in descending order based on 2016 analysed spend per category.

- As in 2014 and 2015 Medical, Surgical and Pharmaceutical Supplies remains the largest category of the 2016 analysed spend at €818m. This is 17% of analysed spend and 19% higher than the 2015 value.
- Facilities Management, Maintenance is the second largest category at €666m analysed spend. This is 14% of analysed spend and 22% higher than 2015.
- The third largest category is Professional Services at €607m, representing 13% of the analysed spend while 4% lower than the 2015 value.

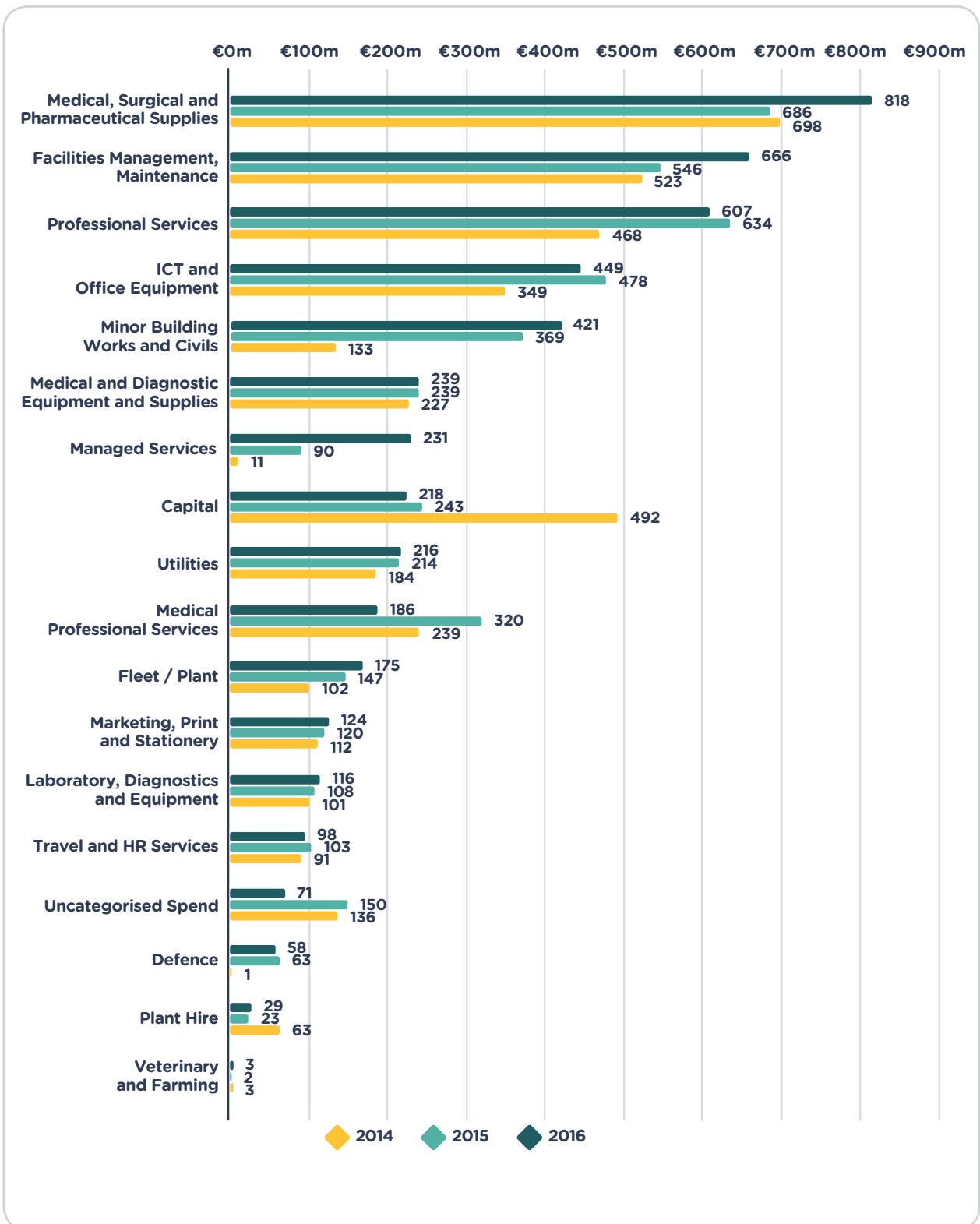


Figure 2.2: Total Analysed Spend by Category 2014 - 2016

Spend Category	2014		2015		2016	
	Spend (€m)	% of Total	Spend (€m)	% of Total	Spend (€m)	% of Total
Medical, Surgical and Pharmaceutical Supplies	698	18%	686	15%	818	17%
Facilities Management, Maintenance	523	13%	546	12%	666	14%
Professional Services	468	12%	634	14%	607	13%
ICT and Office Equipment	349	9%	478	11%	449	10%
Minor Building Works and Civils	133	3%	369	8%	421	9%
Medical and Diagnostic Equipment and Supplies	227	6%	239	5%	239	5%
Managed Services	11	0.3%	90	2%	231	5%
Capital	492	13%	243	5%	218	5%
Utilities	184	5%	214	5%	216	5%
Medical Professional Services	239	6%	320	7%	186	4%
Fleet / Plant	102	3%	147	3%	175	4%
Marketing, Print and Stationery	112	3%	120	3%	124	3%
Laboratory, Diagnostics and Equipment	101	3%	108	2%	116	2%
Travel and HR Services	91	2%	103	2%	98	2%
Uncategorised Spend	136	3%	150	3%	71	2%
Defence	1	0.0%	63	1%	58	1%
Plant Hire	63	2%	23	0.5%	29	1%
Veterinary and Farming	3	0.1%	2	0.0%	3	0.1%
Total Analysed Spend	3,931	100%	4,535	100%	4,723	100%

Table 2.2: Total Analysed Spend by Category 2014 - 2016

2.3 2016 Spend Analysis by Supplier Location

The profile of analysed spend between Irish and international suppliers has remained unchanged from 2015 with the share of 2016 analysed spend with Irish organisations remaining at 94%. The value of analysed spend with suppliers within Ireland was €4.446 billion in 2016, €186 million higher than the 2015 analysed figure. Supplier location is based on the supplier address contained in the payment transaction.

Location	2014		2015		2016	
	Spend (€m)	% of Total	Spend (€m)	% of Total	Spend (€m)	% of Total
Ireland	3,753	95%	4,260	94%	4,446	94%
International	178	5%	275	6%	277	6%
Total Analysed Spend	3,931	100%	4,535	100%	4,723	100%

Table 2.3: Total Analysed Spend by Location 2014 - 2016

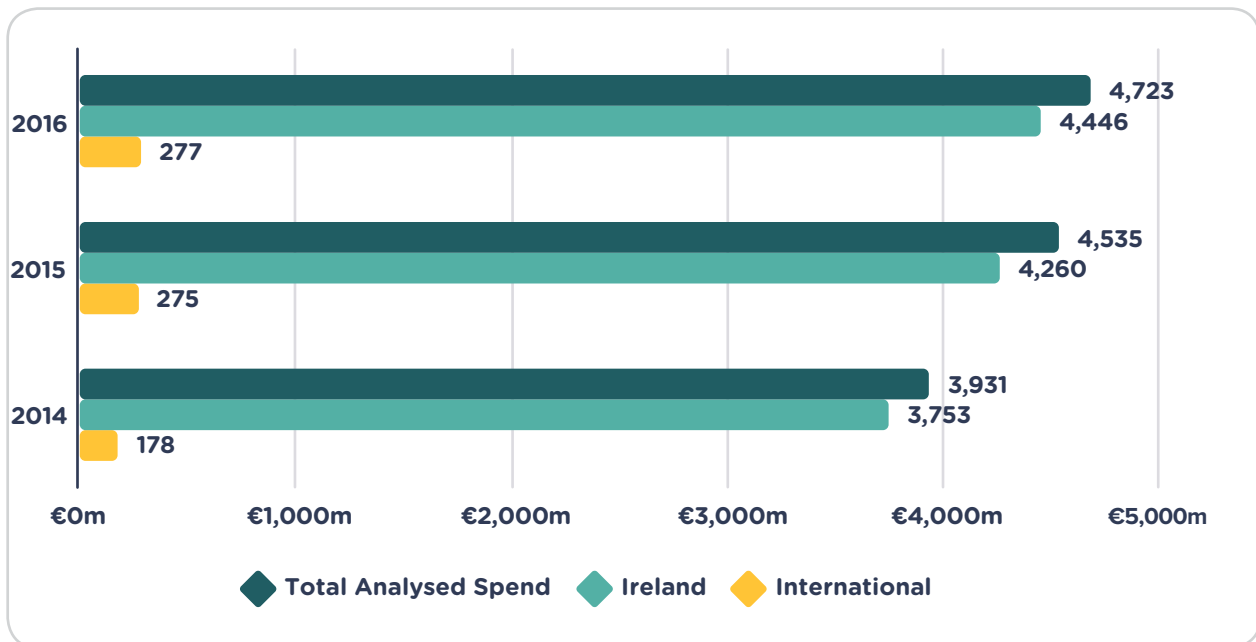


Figure 2.3: Total Analysed Spend by Location 2014 - 2016

2.4 Analysed Spend by Supplier Type

A key point of interest is how much of the state's procurement expenditure is with SMEs. As in 2014 and 2015, the majority of 2016 spend analysed (53%) is with SMEs, one percentage point higher than 2015. The 2016 analysed spend with SMEs was €2.494 billion, €135m higher than 2015. The supplier profile of the analysed spend from 2014 - 2016 is shown in Table 2.4 and Figure 2.4 below.

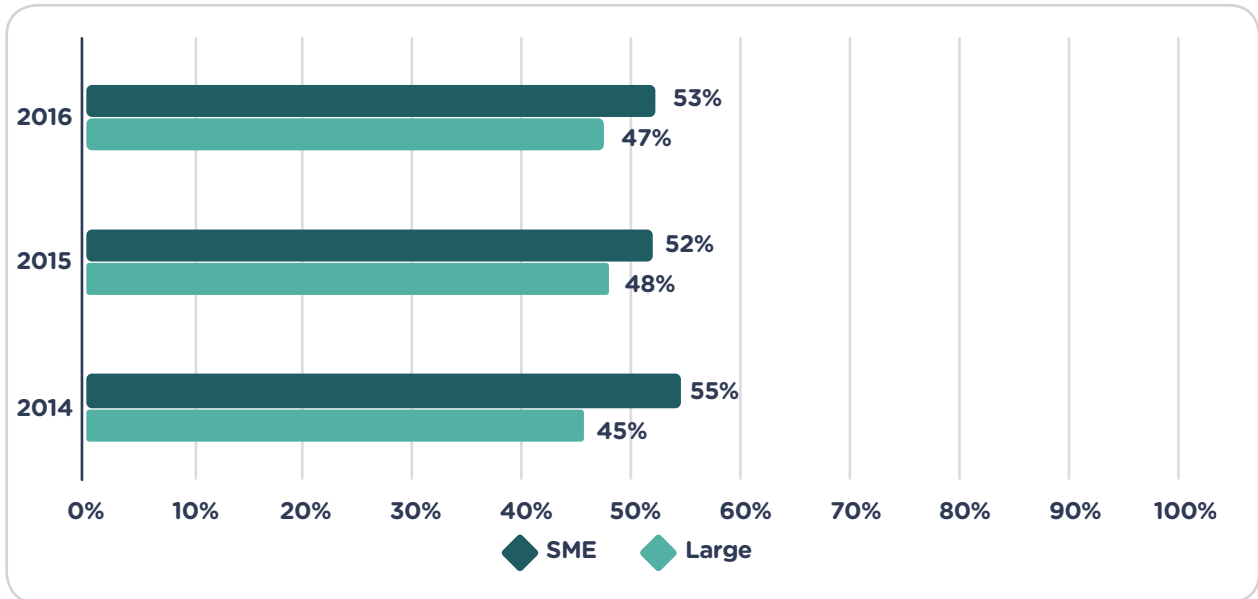


Figure 2.4: Supplier Profile of Total Analysed Spend 2014 - 2016

Supplier Profile	2014	2015	2016
	Spend (€m)	Spend (€m)	Spend (€m)
SME	2,143	2,359	2,494
Large	1,788	2,175	2,229

Table 2.4: Supplier Profile of Total Analysed Spend 2014 - 2016

2.5 2016 Supplier Type by Category

Table 2.5 and Figure 2.5 show the Analysed Spend per Category by Supplier Type for 2014 - 2016. Both the table and the graph are arranged in descending order of the 2016 SME share of spend per category.

- 11 of the 16 procurement spend categories remains predominantly SME (i.e. greater than or equal to the overall 53% SME share of spend), unchanged from 2015 and ranging from 96% in Plant Hire to 58% in Professional Services.
- The SME share in Veterinary and Farming is 92%, while Fleet and Plant and Marketing, Print and Stationery and Minor Building Works are all above 70%.
- Five categories have a large supplier profile i.e. more than 47% of the analysed spend for the category is with large companies - Utilities (92%), Defence (88%), Managed Services (85%), Medical, Surgical and Pharmaceutical Supplies (71%) and ICT and Office Equipment (50%).

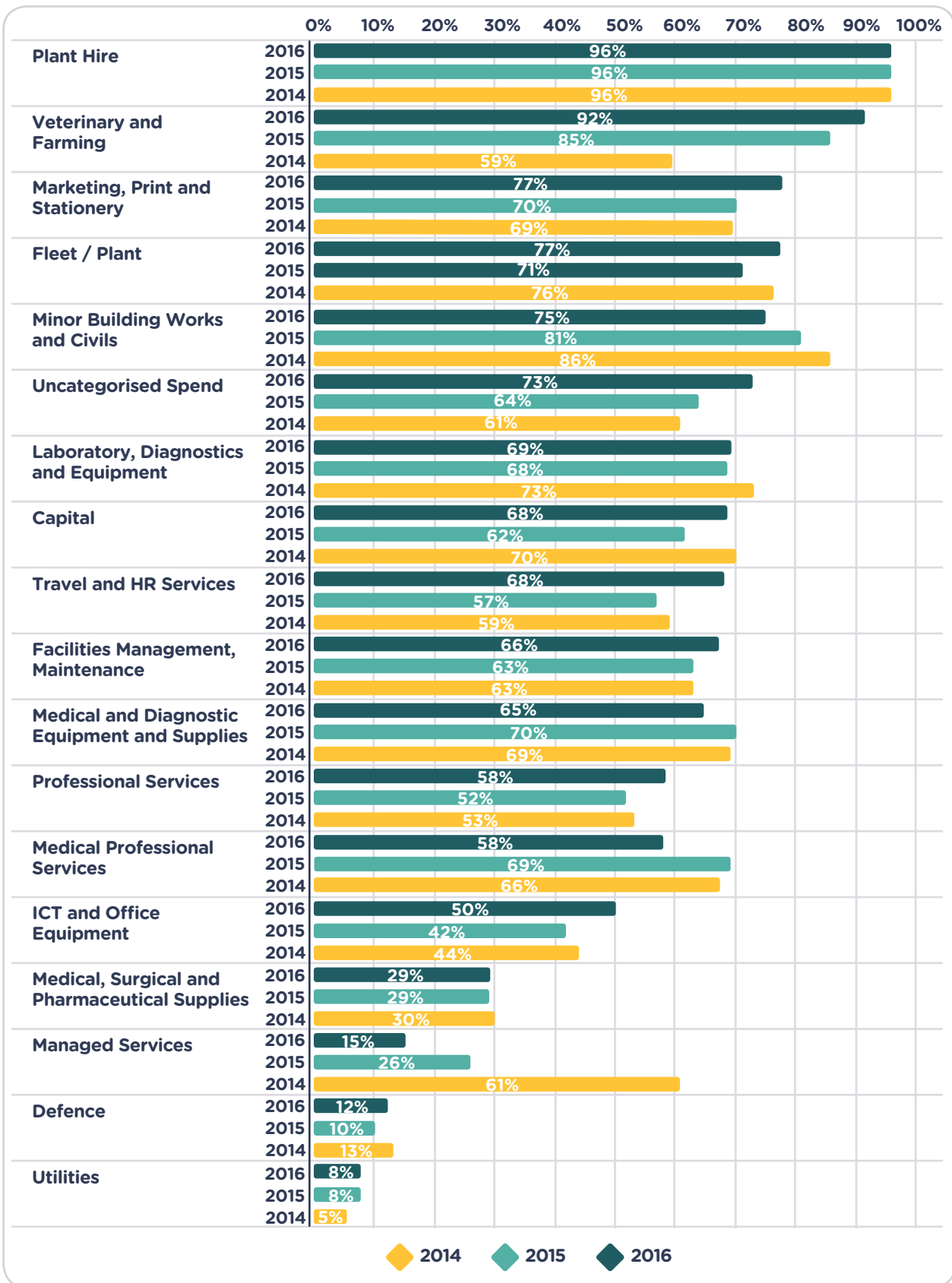


Figure 2.5: SME Share of Category Spend 2014 - 2016

Spend Category	2014			2015			2016		
	Total Category Spend	% Category Spend by Supplier Type		Total Category Spend	% Category Spend by Supplier Type		Total Category Spend	% Category Spend by Supplier Type	
	(€m)	SME	Large	(€m)	SME	Large	(€m)	SME	Large
Plant Hire	63	96%	4%	23	96%	4%	29	96%	4%
Veterinary and Farming	3	59%	41%	2	85%	15%	3	92%	8%
Marketing, Print and Stationery	112	69%	31%	120	70%	30%	124	77%	23%
Fleet / Plant	102	76%	24%	147	71%	29%	175	77%	23%
Minor Building Works and Civils	133	86%	14%	369	81%	19%	421	75%	25%
Uncategorised Spend	136	61%	39%	150	64%	36%	71	73%	27%
Laboratory, Diagnostics and Equipment	101	73%	27%	108	68%	32%	116	69%	31%
Capital	492	70%	30%	243	62%	38%	218	68%	32%
Travel and HR Services	91	59%	41%	103	57%	43%	98	68%	32%
Facilities Management, Maintenance	523	63%	37%	546	63%	37%	666	66%	34%
Medical and Diagnostic Equipment and Supplies	227	62%	38%	239	55%	45%	239	65%	35%
Professional Services	468	53%	47%	634	52%	48%	607	58%	42%
Medical Professional Services	239	66%	34%	320	69%	31%	186	58%	42%
ICT and Office Equipment	349	44%	56%	478	42%	58%	449	50%	50%
Medical, Surgical and Pharmaceutical Supplies	698	30%	70%	686	29%	71%	818	29%	71%
Managed Services	11	61%	39%	90	26%	74%	231	15%	85%
Defence	1	13%	87%	63	10%	90%	58	12%	88%
Utilities	184	5%	95%	214	8%	92%	216	8%	92%
Total Analysed Spend	3,931	55%	45%	4,535	52%	48%	4,723	53%	47%

Table 2.5: SME Share of Category Spend 2014 - 2016

2.6 Summary of 2016 Spend Analysis

The following are the key points in the 2016 spend analysis.

- Spend data from 77 PSBs analysed.
- Total spend data analysed at €4.723 billion for 2016 is €189 million (4%) higher than in 2015.
- 79% of the estimated annual procurement addressable spend of €6 billion within the remit of the OGP and its sector sourcing partners is analysed.
- 94% of analysed spend is with Republic of Ireland based suppliers, unchanged from 2015.
- Medical, Surgical and Pharmaceutical Supplies remains the category with the largest share (17%) of analysed spend at €818 million.
- 53% of analysed spend for 2016 was with SMEs, one percentage point higher than 2015.
- The 2016 supplier profile of 11 of the 16 procurement spend categories remains predominantly SME (i.e. greater than or equal to the overall 53% SME share of spend).

3

Tendering Analysis



3. Tendering Analysis

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

Section 3 of the report analyses the 2016 tendering activity data with comparisons to 2014 and 2015 and includes an update on the 2015 contract award analysis contained in the 2015 published report. It should be noted that all monetary values contained in the tendering analysis are exclusive of VAT. Some more background information on tendering data is available at Section 1.3 in the Introduction chapter.

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

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

3.1 Non-OJEU and OJEU Tender Notices 2016

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

Table 3.1 shows that 76% of the 3,934 published tender notices analysed are for Non-OJEU tenders and account for 9% of the total estimated tender value. OJEU tenders account for 24% of tender notice volume and 91% of the estimated tender notice value.

Analysed Tender Notices	Total Volume	% Tender Notice Volume	Total Estimated Value (€m)	% Total Estimated Value	Average Estimated Value (€m)	Median Estimated Value (€m)
Non-OJEU	3,007	76%	622	9%	0.21	0.06
OJEU	927	24%	6,197	91%	6.68	0.5
Total Analysed	3,934		6,818		1.73	0.08

Table 3.1: 2016 Tender Notices: Non-OJEU and OJEU

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

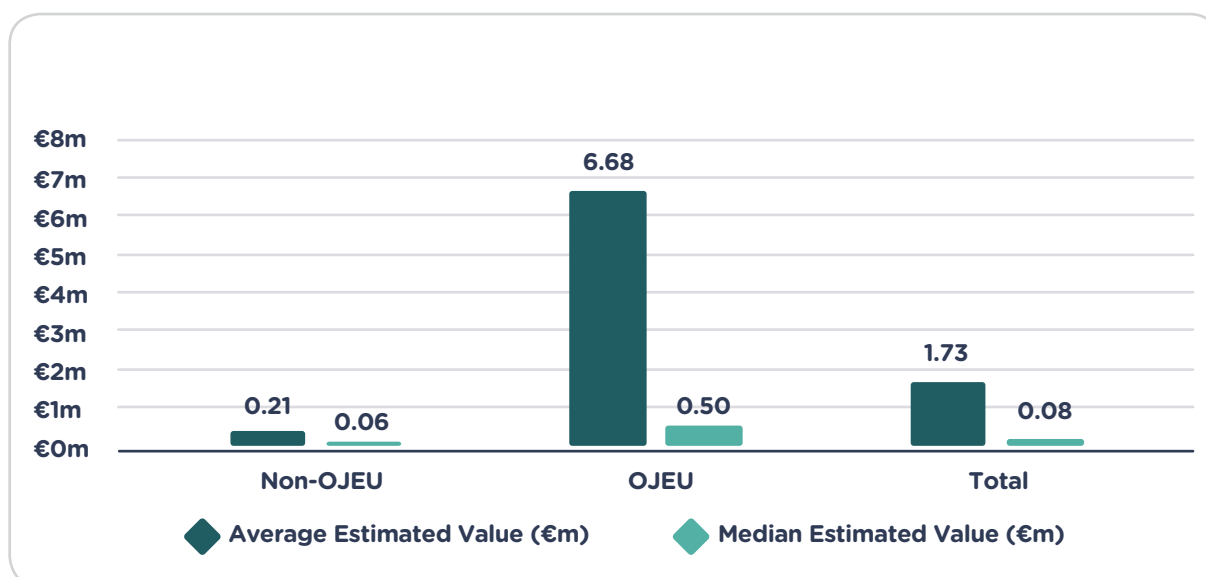


Figure 3.1: 2016 Tender Notices – Average, Median Values for Non-OJEU, OJEU and Total Notices

3.2 Non-OJEU and OJEU Tender Notices 2014 – 2016

Table 3.2 shows the split of 2016 tender notices analysed between Non-OJEU and OJEU compared to that for 2014 and 2015.

At 3,007, the number of Non-OJEU tenders analysed is 3% higher than in 2015 with a total estimated contract value of €622m, 12% higher than 2015. The number of OJEU tenders analysed was 927, just 1% higher than 2015. The total estimated contract value for OJEU tenders is €6.197 billion, 48% higher than the 2015 figure. The increase is primarily attributable to the higher value of OJEU tender notices in four procurement categories (Managed Services, Construction and Civils, Plant Hire and Facilities Management) where the total estimated contract value of the 5 largest individual notices published in 2016 exceeded €2 billion.

There were no tender notices published in 2015 of a comparable value in these same categories. This variation in tendering activity may be indicative of a cyclical pattern of addressing categories of spend over a number of years to allow the establishment and use of procurement framework agreements.

Figure 3.2 shows Non-OJEU and OJEU tender volumes from 2014 to 2016 while Figure 3.3 shows tender values for the same period.

Analysed Tender Notices	2014		2015		2016	
	Volume	Value (€m)	Volume	Value (€m)	Volume	Value (€m)
Non-OJEU	3,184	803	2,916	555	3,007	622
OJEU	937	2,758	920	4,192	927	6,197
Total	4,121	3,561	3,836	4,747	3,934	6,818

Table 3.2: Non-OJEU and OJEU Tender Notices 2014 - 2016

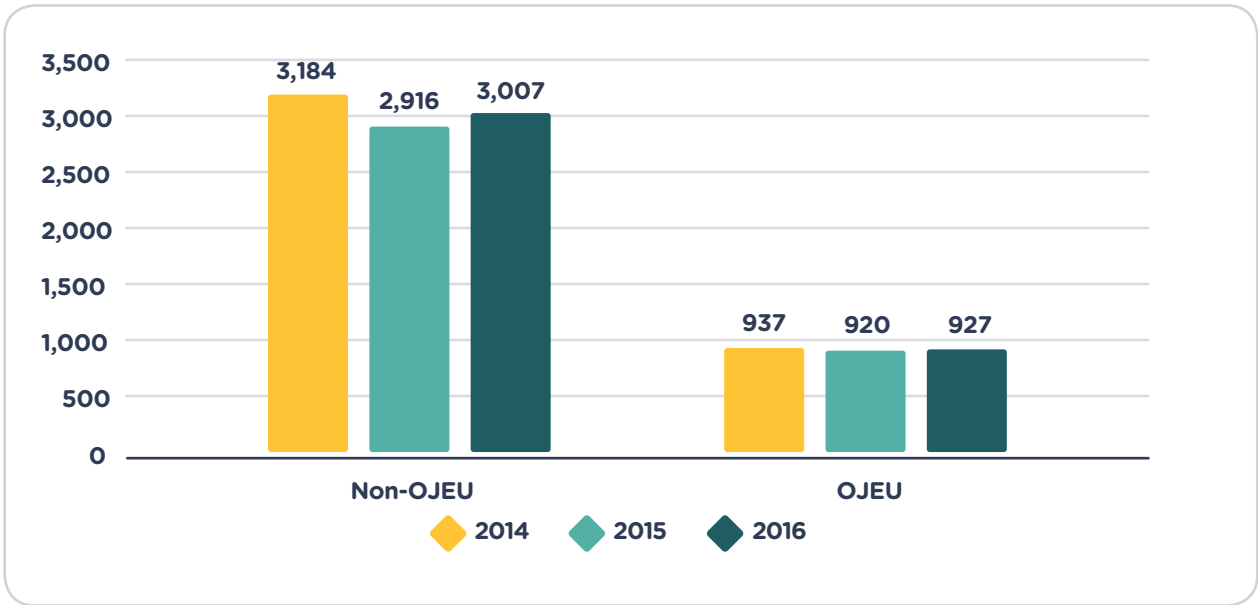


Figure 3.2: Non-OJEU and OJEU Tender Notice Volumes: 2014 - 2016

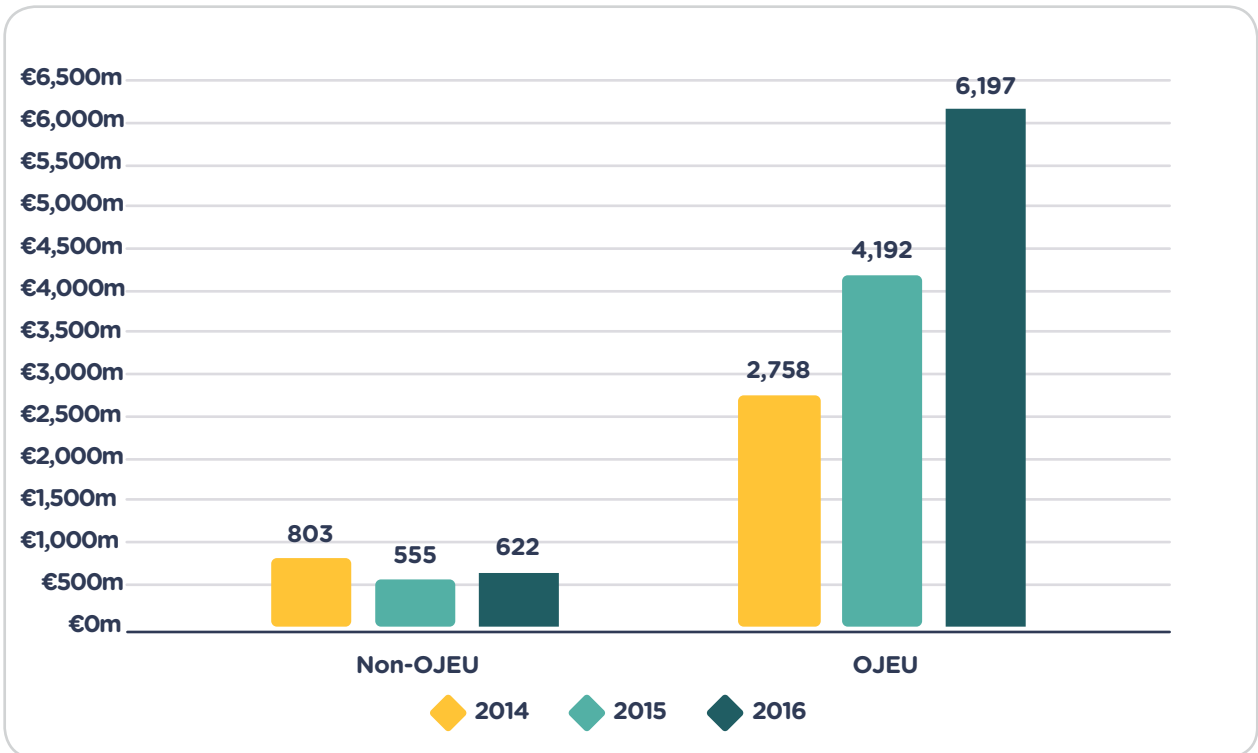


Figure 3.3: Non-OJEU and OJEU Analysed Tender Notice Estimated Values (€): 2014 - 2016

3.3 Tender Notices by Category 2014 - 2016

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

Table 3.3 analyses the volume and value of tender notices published by spend category for 2014, 2015 and 2016. The categories are arranged based on the 2016 data in descending order of total value. It should be noted that Construction and Civils Works category includes both major and minor building works and civils. This category would be equivalent to combining the Minor Building Works and Civils category with the Capital category in the spend analysis in Section 2. The Common Procurement Vocabulary (CPV) codes associated with a small number of tender notices could not be mapped to a spend category and these notices are described as 'Uncategorised'.

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

The average estimated value of 2016 published tender notices analysed for 2016 is €1.73 million as against €1.2 million in 2015, mainly due to the higher value of OJEU tender notices in four procurement categories (Managed Services, Construction and Civils, Plant Hire and Facilities Management) where the total estimated contract value of the 5 largest individual notices published in 2016 exceeded €2 billion. The median (typical) estimated contract values for tenders analysed in 2016 is 20% lower than 2015 at €80,000.

Construction and Civils Works is the highest value tender notice category ahead of Managed Services. At €1.786 billion the total estimated contract value for Construction and Civils Works tender notices for 2016 is €699 million higher than 2015. The mean (average) tender notice value for this category in 2016 is €1.65 million, the median (typical) tender notice value is €130,000.

Spend Category	2014					
	Volume of Tender Notices				Estimated Value of Tender Notices	
	Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)
Construction and Civils Works	1,210	29%	1,841	52%	1.5	0.17
Managed Services	458	11%	171	5%	0.4	0.06
Medical and Diagnostic Equipment and Supplies	72	2%	63	2%	0.9	0.10
Facilities Management, Maintenance	438	11%	264	7%	0.6	0.08
Information and Communication Technology, and Office Equipment	566	14%	232	7%	0.4	0.08
Medical Professional Services	76	2%	127	4%	1.7	0.17
Professional Services	479	12%	348	10%	0.7	0.10
Plant Hire	1	0.0%	0.0	0.0%	0.1	0.13
Uncategorised Spend	30	1%	11	0.0%	0.4	0.06
Travel and HR Services	240	5.8%	178	5%	0.7	0.06
Fleet / Plant	257	6%	67	2%	0.3	0.08
Laboratory, Diagnostics and Equipment	115	3%	108	3%	0.9	0.08
Marketing, Print and Stationery	41	1%	8	0.2%	0.2	0.05
Defence	41	1%	19	0.5%	0.5	0.09
Veterinary & Farming	73	2%	8	0.2%	0.1	0.07
Medical, Surgical and Pharmaceutical Supplies	13	0.3%	4	0.1%	0.3	0.10
Utilities	11	0.3%	112	3%	10.1	0.15
Analysed Total	4,121	100%	3,561	100%	0.9	0.10

Table 3.3: Tender Notice by Category 2014 - 2016

Note: Landscape Version of Table 3.3 available on page 60

2015						2016					
Volume of Tender Notices				Estimated Value of Tender Notices		Volume of Tender Notices				Estimated Value of Tender Notices	
Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)	Volume	% Tender Volume	Total Value (€M)	% Total Value	Average Value (€M)	Median Value (€M)
1,074	28%	1,087	23%	1.0	0.13	1,083	28%	1,786	26%	1.65	0.13
252	7%	405	9%	1.6	0.10	377	10%	1,329	19%	3.53	0.05
98	3%	116	2%	1.2	0.08	106	3%	902	13%	8.51	0.14
416	11%	346	7%	0.8	0.07	428	11%	749	11%	1.75	0.06
577	15%	375	8%	0.7	0.07	534	14%	695	10%	1.30	0.07
57	1%	240	5%	4.2	0.18	63	2%	235	3%	3.74	0.12
471	12%	352	7%	0.7	0.08	467	12%	232	3%	0.50	0.06
2	0.1%	1	0.0%	0.3	0.28	1	0.0%	220	3%	220	220
11	0.0%	4	0.0%	0.3	0.28	71	2%	208	3%	2.93	0.04
176	4.6%	126	11%	0.7	0.06	206	5%	184	3%	0.89	0.06
418	11%	408	9%	1.0	0.08	277	7%	151	2%	0.54	0.10
90	2%	20	0.4%	0.2	0.07	108	3%	45	0.7%	0.42	0.07
39	1%	31	0.7%	0.8	0.05	50	1%	33	0.5%	0.66	0.03
37	1%	7	0.1%	0.2	0.09	50	1%	18	0.3%	0.36	0.04
84	2%	12	0.3%	0.1	0.07	93	2%	16	0.2%	0.18	0.05
18	0.5%	73	2%	4.1	0.10	13	0.3%	14	0.2%	1.07	0.06
16	0.4%	1,144	24%	71.5	1.25	7	0.2%	1	0.0%	0.12	0.12
3,836	100%	4,747	100%	1.2	0.10	3,934	100%	6,818	100%	1.73	0.08

3.4 2016 In-Year Contract Award Notices

Section 3.4 analyses 2016 'in-year' awards – award notices published in 2016 for tender notices published in 2016. It is important to note that the values used in the tendering award analysis are the estimated contract values contained in the associated published tender notices.

Table 3.4 sets out the volume of the in-year contract award notices (879) published in 2016 and the associated total, average and median values for awards and split by OJEU and Non-OJEU. OJEU award notices are 30% (267) of the total in-year award notices while Non-OJEU are 70% (612). The OJEU award notices account for 91% (€867 million) of the total value while the 9% balance (€86 million) is Non-OJEU. The average estimated value for total 2016 in-year contract award value is €1.08 million while the median estimated award value is €100,000.

Contract Award Notices	Number of Tender Notices Analysed	Number of Award Notices	Total Estimated Value (€m)	Average Estimated Value (€m)	Median Estimated Value (€m)
Non-OJEU	3,007	612	86	0.14	0.06
OJEU	927	267	867	3.25	0.36
Total	3,934	879	953	1.08	0.10

Table 3.4: 2016 In-Year Contract Award Notices

3.5 In-Year Contract Award Notices 2014 - 2016

Table 3.5 sets out 2016 in-year contract award notices along with those for 2014 and 2015. The number of 'in-year' award notices published (i.e. award notices published in 2016 for notices published in 2016) is 4% higher at 879, up from 846 'in-year' awards in 2015. Non-OJEU award notices are 6% higher at 612 for 2016 while OJEU award notices are 1% lower at 267.

The percentage of total 2016 in-year contract award notices relative to tender notices published was 22%, the same as 2015. The Non-OJEU ratio has remained largely consistent with 2015 at 20%, as does the OJEU ratio at 29%.

The total estimated award value for 2016 is €953 million, €840 million lower than 2015. The average estimated value of 2016 award notices is €1.08 million, €1.04 million lower than 2015. The 2016 median value of €100,000 is the same as the median for 2014 and 2015. As the average estimated contract award value may be skewed by a small volume of high or low contract award values, the median is a better indicator of the most prevalent value and is a better method for indicating what a 'typical' contract award value may be.

Contract Award Notices	2014			2015			2016		
	Total	OJEU	Non-OJEU	Total	OJEU	Non-OJEU	Total	OJEU	Non-OJEU
Number of Tender Notices Analysed	4,121	937	3,184	3,836	920	2,916	3,934	927	3,007
Number of Award Notices	1,087	412	675	846	269	577	879	267	612
Awards as a % of Tenders	26%	44%	21%	22%	29%	20%	22%	29%	20%
Total Estimated Award Value (€m)	506	390	116	1,793	1,705	88	953	867	86
Average Estimated Award Value (€m)	0.47	0.95	0.17	2.12	6.34	0.15	1.08	3.25	0.14
Median Estimated Award Value (€m)	0.1	0.42	0.07	0.1	0.4	0.06	0.10	0.36	0.06

Table 3.5: In-Year Contract Award Notices 2014 - 2016

3.6 In-Year Contract Award Notices by Category 2014 – 2016

Table 3.6 contains a breakdown of the volume and estimated value of contract award notices by procurement spend category for 2014 – 2016. As pointed out earlier the Construction and Civils Works category includes both major and minor building works and civils. This category would be equivalent to combining the Minor Building Works and Civils category with the Capital category in the spend analysis in Section 2.

Spend Category	2014 In-Year Award Notices			
	Estimated Award Value			
	Volume	Total (£m)	Average (£m)	Median (£m)
Managed Services	122	30.86	0.25	0.10
Facilities Management, Maintenance	147	43.70	0.30	0.16
Uncategorised	20	2.95	0.15	0.05
Construction and Civils Works	161	199.71	1.24	0.15
Information and Communication Technology, and Office Equipment	157	31.88	0.20	0.10
Professional Services	175	48.79	0.28	0.10
Medical and Diagnostic Equipment and Supplies	16	2.67	0.17	0.08
Travel and HR Services	55	12.33	0.22	0.07
Fleet / Plant	93	18.81	0.20	0.08
Defence	14	0.83	0.06	0.06
Medical Professional Services	36	17.64	0.49	0.21
Laboratory, Diagnostics and Equipment	47	8.81	0.19	0.07
Veterinary & Farming	19	2.51	0.13	0.06
Marketing, Print and Stationery	18	1.44	0.08	0.09
Utilities	4	80.39	20.10	0.30
Medical, Surgical and Pharmaceutical Supplies	2	2.60	1.30	1.30
Plant Hire	1	0.13	0.13	0.13
Grand Total	1,087	506	0.5	0.10

Table 3.6: In-Year Awards By Category 2014 - 2016

Note: Landscape Version of Table 3.6 available on page 61

The Common Procurement Vocabulary (CPV) codes associated with a small number of tender notices could not be readily mapped to a spend category and these notices are described as 'Uncategorised'. The data in the table is presented based on the descending order of award value by category in 2016.

2015 In-Year Award Notices				2016 In-Year Award Notices			
Estimated Award Value				Estimated Award Value			
Volume	Total (€m)	Average (€m)	Median (€m)	Volume	Total (€m)	Average (€m)	Median (€m)
126	100.69	0.80	0.10	118	275.16	2.33	0.05
111	163.64	1.47	0.10	99	233.45	2.36	0.10
6	1.47	0.25	0.24	10	141.96	14.20	0.06
109	73.88	0.68	0.12	140	99.55	0.71	0.20
177	112.80	1.47	0.10	155	59.64	0.38	0.09
94	40.87	0.43	0.10	92	49.68	0.54	0.10
20	45.17	2.26	0.14	19	29.46	1.55	0.12
41	11.01	0.27	0.05	48	19.25	0.40	0.13
54	10.47	0.19	0.11	79	19.09	0.24	0.10
13	3.42	0.26	0.14	17	8.45	0.50	0.06
11	11.01	0.27	0.05	20	6.93	0.35	0.13
29	3.26	0.11	0.06	46	6.83	0.15	0.05
22	3.45	0.16	0.12	25	2.47	0.10	0.08
17	28.42	1.67	0.06	7	1.21	0.17	0.06
8	1,136.53	147.07	2.55	1	0.10	0.10	0.10
7	46.86	6.69	0.13	3	0.0	0.0	0.0
1	0.05	0.05	0.05	0	0.0	0.0	0.0
846	1,793	2.1	0.10	879	953.24	1.08	0.10

3.7 2015 Tendering Analysis Update

The *Public Service Spend and Tendering Analysis Report 2015* analysed contract award notices published in 2015 that related to tender notices published in 2015 i.e. in-year awards. It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process. In this report, the contract award notices information published since the end of 2015 for tender notices issued in 2015 gives a more complete view of the 'total' awards for 2015.

Table 3.7 summarises the volume and value of both in-year and total contract award notices issued in respect of tender notices published in 2015. The volume of total contract award notices (1,517) is 79% greater than the 'in-year' awards of 846 award notices. The 2015 total estimated award value of €4.086 billion is over twice the 2015 in-year estimated award value of €1,793 million.

	2015 In-Year Awards	2015 Total Awards
Number of Contract Award Notices	846	1,517
Total Estimated Contract Awards Value (€m)	1,793	4,086

Table 3.7: 2015 In-Year Contract Award Notices

Table 3.8 breaks down the volume and value of 2015 in-year awards and 2015 total contract awards notices by Non-OJEU and OJEU thresholds and includes the average and median award values. As would be expected, OJEU award notices have higher average estimated values than Non-OJEU notices. At €2.69 million the average estimated value of 2015 total awards is €570,000 higher than the 2015 in-year awards while the median award value is €10,000 higher at €110,000.

Contract Awards	2015 In-Year Awards			2015 Total Awards		
	TOTAL	OJEU	Non-OJEU	TOTAL	OJEU	Non-OJEU
Number of In-Year Award Notices	846	269	577	1,517	569	948
Total Estimated Award Value (€m)	1,793	1,705	88	4,086	3,917	169
Average Estimated Award Value (€m)	2.12	6.34	0.15	2.69	6.88	0.18
Median Estimated Award Value (€m)	0.10	0.40	0.06	0.11	0.45	0.07

Table 3.8: 2015 Contract Awards Non-OJEU and OJEU

3,836 tender notices were analysed in the 2015 report. As illustrated in Table 3.9, the percentage of 2015 in-year contract award notices relative to tender notices published is 22%; and that for the total 2015 awards is 40%. For OJEU and Non-OJEU total awards the comparable percentages are 62% and 33%. It should be noted that as withdrawals or cancellations of tenders may take place after publication of the notice and not be recorded on eTenders this could adversely impact the ratio of awards to tender notices.

2015 Award and Tender Notices	Total	OJEU	Non-OJEU
Number of Tender Notices Analysed	3,836	920	2,916
Number of In-Year Award Notices	846	269	577
In-Year Awards as a % of Tender Notices	22%	29%	20%
Number of Total Award Notices	1,517	569	948
Total Awards as a % of Tender Notices	40%	62%	33%

Table 3.9: 2015 Contract Awards relative to Tender Notices

3.8 Summary of 2016 Tendering Analysis

- 1) At 3,934, the number of published tender notices analysed is 3% higher than in 2015.
- 2) The estimated contract value of 2016 published tender notices is 44% higher at €6.818 billion (up from €4.747 billion in 2015) and is mainly attributable to high value tender notices in four procurement categories (Managed Services, Construction and Civils, Plant Hire and Facilities Management).
- 3) The average estimated value of 2016 published tender notices analysed is €1.73 million as against €1.2 million in 2015, mainly due to high estimated contract values for tenders in the Construction and Civils Works category. The median (typical) estimated contract values for tenders analysed in 2016 is 20% lower than 2015 at €80,000.
- 4) 76% (3,007) of tender notices analysed are below the Official Journal of the European Union (OJEU) tender thresholds, accounting for an estimated value of €622 million. This represents 9% of all 2016 published tender estimated values. (See Appendix 2 for details of OJEU thresholds).

- 5)** The Construction and Civils Works category accounts for the largest share (€1.786 billion) of the total estimated contract value of published tender notices with an average contract value of €1.65 million and a median (typical) value of €130,000.
- 6)** The average estimated contract value of 2016 tender notices analysed by category ranges from €8.51 million (Medical and Diagnostic Equipment and Supplies) to €120,000 (Utilities) while the median values range from €140,000 (Medical and Diagnostic Equipment and Supplies) to €30,000 (Marketing, Print and Stationery).
- 7)** The median estimated contract value of 2016 tender notices is less than or equal to €100,000 in 11 of the 16 spend categories.
- 8)** The number of 'in-year' award notices published (i.e. award notices published in 2016 for notices published in 2016) is 4% higher at 879, up from 846 'in-year' awards in 2015.
- 9)** Total in-year award notices as a percentage of tender notices published has remained 22% in 2016 as it was in 2015.

4

Conclusion



4: Conclusion

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

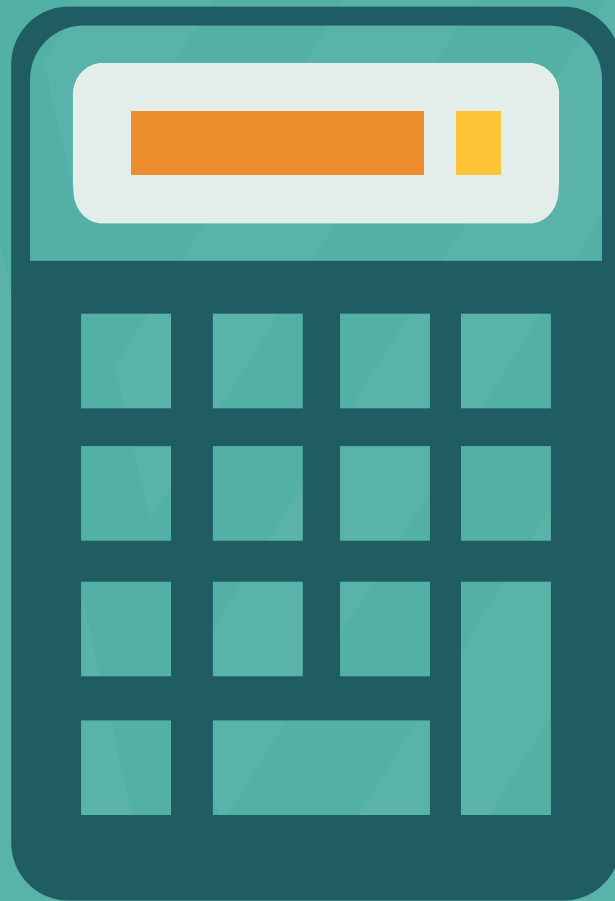
The 2016 spend analysis of 79% (€4.723 billion) of the estimated annual procurement addressable spend of €6 billion in this report indicates that 94% of the State's expenditure is with firms within Ireland and the majority (53%) of the State's expenditure is with SMEs. SMEs have the greater share of spend analysed in 11 of the 16 procurement spend categories ranging from 96% in Plant Hire to 58% in Professional Services. As PSBs do not, in general, record price and volume information relating to expenditure, analysis is limited to a summary level across the procurement spend categories.

This report summarises the tendering activity of the public service in 2016 as recorded on the eTenders public procurement platform. The analysis shows that 76% of the 3,934 tender notices analysed are smaller value (below OJEU threshold) tenders. The median estimated contract value of 2016 tender notices is less than or equal to €100k in 11 of the 16 spend categories.

The tendering analysis gives a more complete view of the 2015 tender cycle by looking at contract award notices published since the end of 2015 that relate to tender notices published in 2015. This shows that the volume of total contract award notices (1,517) is 79% greater than published in 2015 (846). It is normal to have a time delay between the publication of a tender notice and a contract award notice including spanning calendar years due to the timeframe required to complete a procurement process.

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

Appendices



Appendix 1 – Public Service Body Definition

Public Service Body Definition:

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

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

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

Commercial Semi-State Bodies Definition:

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

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

Schedule 1 provides as follows:

- 1) A body whose activities are commercial in character and that was established by or under a statute that—
 - (a) was in force in Saorstát Éireann immediately before the date of the coming into operation of the Constitution, and
 - (b) continues to be of full force and effect by virtue of Article 50 of the Constitution.
- 2) A harbour authority within the meaning of the Harbours Act 1946 or a company to which section 7 of the Harbours Act 1996 applies.
- 3) An Post.

- 4) An Post National Lottery Company.
- 5) Bord Gáis Éireann.
- 6) Bord na gCon.
- 7) Bord na Móna, public limited company.
- 8) Coillte Teoranta.
- 9) Córas Iompair Éireann.
- 10) Cork Airport Authority, public limited company.
- 11) Drogheda Port Company.
- 12) Dublin Airport Authority, public limited company.
- 13) Dublin Port Company.
- 14) Dún Laoghaire Harbour Company.
- 15) EirGrid.
- 16) Electricity Supply Board.
- 17) Ervia.
- 18) Galway Harbour Company.
- 19) Horse Racing Ireland.
- 20) New Ross Port Company.
- 21) Port of Cork.
- 22) Port of Waterford Company.
- 23) Raidió Teilifís Éireann.
- 24) Shannon Airport Authority, public limited company.
- 25) Shannon Foynes Port Company.
- 26) Teilifís na Gaeilge.
- 27) The Irish Aviation Authority.
- 28) The Irish National Stud Company, Limited.
- 29) Voluntary Health Insurance Board.
- 30) Wicklow Port Company.

Appendix 2 – OJEU Procurement Thresholds

Thresholds (exclusive of VAT) above which advertising of contracts in the Official Journal of the EU (OJEU) is obligatory, applicable from 1 January 2016*		
	Threshold	Applies to
Works		
Contract Notice	€5,225,000	Government Departments and Offices, Local and Regional Authorities and other public bodies.
Supplies and Services		
Contract Notice	€135,000	Government Departments and Offices.
Contract Notice	€209,000	Local and Regional Authorities and public bodies outside the Utilities sector.
Utilities		
Works Contracts / Prior Indicative Notice	€5,225,000	Entities in Utilities sectors covered by GPA (Government Procurement Agreement as part of the WTO arrangements).
Supplies and Services	€418,000	Entities in Utilities sector covered by GPA.

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

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

**New thresholds came into effect on 1 January 2018 after the period covered by this report.*

Appendix 3 – Public Service Bodies that provided 2016 Spend Data

Sector	Public Service Body
Central Government	Department of Agriculture, Food and the Marine
	Department of Defence
	Department of Finance
	Department of Health
	Department of Public Expenditure and Reform
	Department of Social Protection
	Department of the Taoiseach
	Department of Transport Tourism and Sport
	National Library of Ireland
	The Office of the Revenue Commissioners
Education	Athlone Institute of Technology
	Cork Institute of Technology
	Dublin City University (DCU)
	Dublin Institute of Technology (DIT)
	Dún Laoghaire Institute of Art, Design and Technology
	Dundalk Institute of Technology
	Galway - Mayo Institute of Technology
	Institute of Technology, Tallaght
	Institute of Technology, Tralee
	Letterkenny Institute of Technology
	Limerick Institute of Technology
	National University of Ireland Galway (NUIG)
	SOLAS
	Trinity College Dublin (TCD)
	University College Cork (UCC)
	University College Dublin (UCD)
	Waterford Institute of Technology

Sector	Public Service Body
Health	Beaumont Hospital, Dublin
	HSE East Region
	HSE Mid-West Region
	HSE Midlands Region
	HSE North East Region
	HSE North West Region
	HSE South East Region
	HSE Southern Region
	HSE West Region
	Marymount University Hospital & Hospice
	Mater Misericordiae University Hospital
	National Rehabilitation Hospital
	St. James's Hospital
Tallaght Hospital	
Justice	Courts Service
	Garda
	Irish Prison Service
	Justice and Equality
	Property Registration Authority

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

Appendix 4 – Spend Categories

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

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

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

Appendix 5 – Supplier Classification

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

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

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

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

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

Appendix 6 – Overview of Data Analysis Methodology

This *Public Service Spend and Tendering Analysis Report for 2016* report is based on two data sets – the first is expenditure data provided by PSBs and the second is related to tendering activities on eTenders, the national procurement platform.

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

Spend Data Analysis Methodology

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

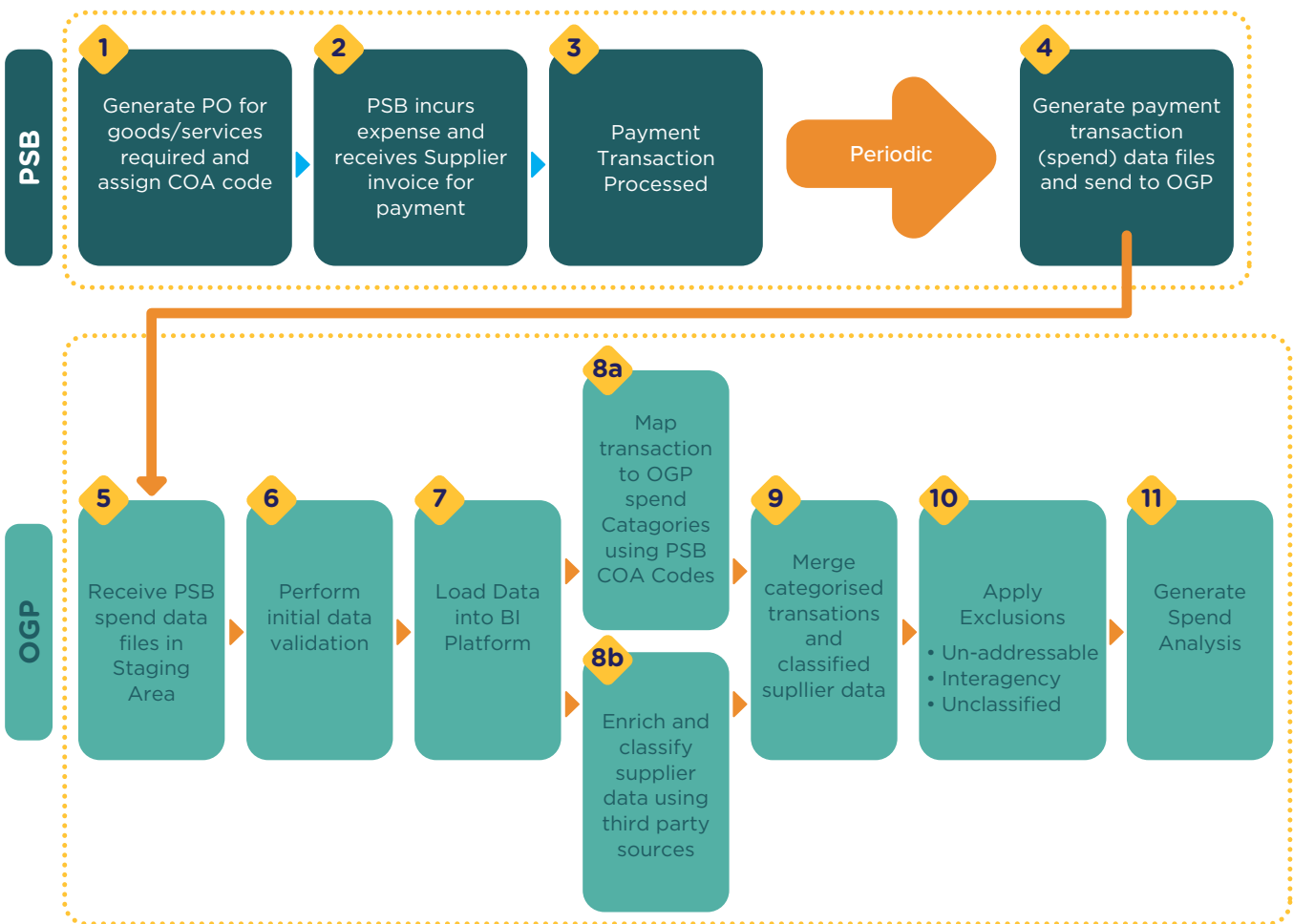


Figure A: Overview of Spend Data Analysis Methodology

Methodology Steps

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

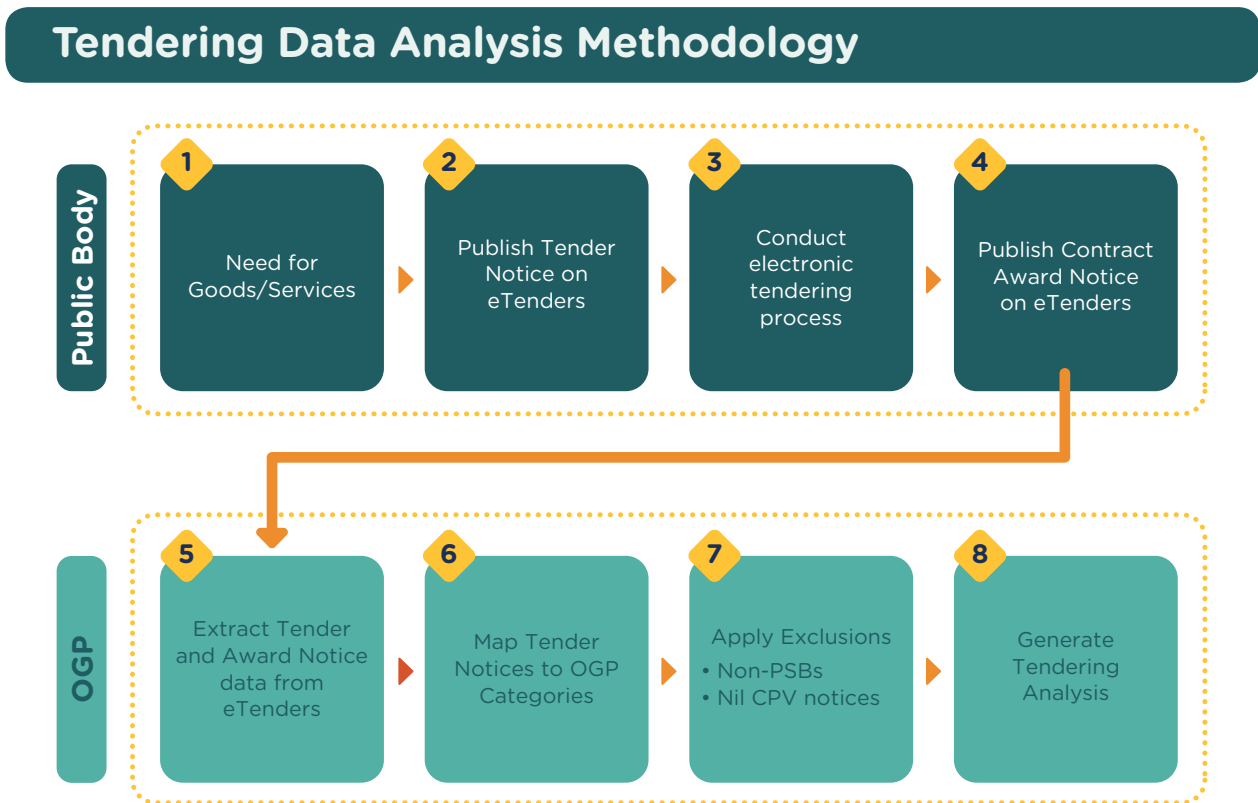


Figure B: Overview of Tender Data Analysis Methodology

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

Spend Category	2014						2015						2016					
	Volume of Tender Notices			Estimated Value of Tender Notices			Volume of Tender Notices			Estimated Value of Tender Notices			Volume of Tender Notices			Estimated Value of Tender Notices		
	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)	Volume	% Tender Volume	Total Value (£M)	% Total Value	Average Value (£M)	Median Value (£M)
Construction and Civils Works	1,210	29%	1,841	52%	1.5	0.17	1,074	28%	1,087	23%	1.0	0.13	1,083	28%	1,786	26%	1.65	0.13
Managed Services	458	11%	171	5%	0.4	0.06	252	7%	405	9%	1.6	0.10	377	10%	1,329	19%	3.53	0.05
Medical and Diagnostic Equipment and Supplies	72	2%	63	2%	0.9	0.10	98	3%	116	2%	1.2	0.08	106	3%	902	13%	8.51	0.14
Facilities Management, Maintenance	438	11%	264	7%	0.6	0.08	416	11%	346	7%	0.8	0.07	428	11%	749	11%	1.75	0.06
Information and Communication Technology, and Office Equipment	566	14%	232	7%	0.4	0.08	577	15%	375	8%	0.7	0.07	534	14%	695	10%	1.30	0.07
Medical Professional Services	76	2%	127	4%	1.7	0.17	57	1%	240	5%	4.2	0.18	63	2%	235	3%	3.74	0.12
Professional Services	479	12%	348	10%	0.7	0.10	471	12%	352	7%	0.7	0.08	467	12%	232	3%	0.50	0.06
Plant Hire	1	0.0%	0.0	0.0%	0.1	0.13	2	0.1%	1	0.0%	0.3	0.28	1	0.0%	220	3%	220	220
Uncategorised Spend	30	1%	11	0.0%	0.4	0.06	11	0.0%	4	0.0%	0.3	0.28	71	2%	208	3%	2.93	0.04
Travel and HR Services	240	5.8%	178	5%	0.7	0.06	176	4.6%	126	11%	0.7	0.06	206	5%	184	3%	0.89	0.06
Fleet / Plant	257	6%	67	2%	0.3	0.08	418	11%	408	9%	1.0	0.08	277	7%	151	2%	0.54	0.10
Laboratory, Diagnostics and Equipment	115	3%	108	3%	0.9	0.08	90	2%	20	0.4%	0.2	0.07	108	3%	45	0.7%	0.42	0.07
Marketing, Print and Stationery	41	1%	8	0.2%	0.2	0.05	39	1%	31	0.7%	0.8	0.05	50	1%	33	0.5%	0.66	0.03
Defence	41	1%	19	0.5%	0.5	0.09	37	1%	7	0.1%	0.2	0.09	50	1%	18	0.3%	0.36	0.04
Veterinary & Farming	73	2%	8	0.2%	0.1	0.07	84	2%	12	0.3%	0.1	0.07	93	2%	16	0.2%	0.18	0.05
Medical, Surgical and Pharmaceutical Supplies	13	0.3%	4	0.1%	0.3	0.10	18	0.5%	73	2%	4.1	0.10	13	0.3%	14	0.2%	1.07	0.06
Utilities	11	0.3%	112	3%	10.1	0.15	16	0.4%	1,144	24%	71.5	1.25	7	0.2%	1	0.0%	0.12	0.12
Analysed Total	4,121	100%	3,561	100%	0.9	0.10	3,836	100%	4,747	100%	1.2	0.10	3,934	100%	6,818	100%	1.73	0.08

Landscape 1 Table 3.3: Tender Notice by Category 2014 - 2016
 Note: Portrait Version of Table 3.3 available on page 36

Spend Category	2014 In-Year Award Notices				2015 In-Year Award Notices				2016 In-Year Award Notices			
	Estimated Award Value				Estimated Award Value				Estimated Award Value			
	Volume	Total (£m)	Average (£m)	Median (£m)	Volume	Total (£m)	Average (£m)	Median (£m)	Volume	Total (£m)	Average (£m)	Median (£m)
Managed Services	122	30.86	0.25	0.10	126	100.69	0.80	0.10	118	275.16	2.33	0.05
Facilities Management, Maintenance	147	43.70	0.30	0.16	111	163.64	1.47	0.10	99	233.45	2.36	0.10
Uncategorised	20	2.95	0.15	0.05	6	1.47	0.25	0.24	10	141.96	14.20	0.06
Construction and Civils Works	161	199.71	1.24	0.15	109	73.88	0.68	0.12	140	99.55	0.71	0.20
Information and Communication Technology, and Office Equipment	157	31.88	0.20	0.10	177	112.80	1.47	0.10	155	59.64	0.38	0.09
Professional Services	175	48.79	0.28	0.10	94	40.87	0.43	0.10	92	49.68	0.54	0.10
Medical and Diagnostic Equipment and Supplies	16	2.67	0.17	0.08	20	45.17	2.26	0.14	19	29.46	1.55	0.12
Travel and HR Services	55	12.33	0.22	0.07	41	11.01	0.27	0.05	48	19.25	0.40	0.13
Fleet / Plant	93	18.81	0.20	0.08	54	10.47	0.19	0.11	79	19.09	0.24	0.10
Defence	14	0.83	0.06	0.06	13	3.42	0.26	0.14	17	8.45	0.50	0.06
Medical Professional Services	36	17.64	0.49	0.21	11	11.01	0.27	0.05	20	6.93	0.35	0.13
Laboratory, Diagnostics and Equipment	47	8.81	0.19	0.07	29	3.26	0.11	0.06	46	6.83	0.15	0.05
Veterinary & Farming	19	2.51	0.13	0.06	22	3.45	0.16	0.12	25	2.47	0.10	0.08
Marketing, Print and Stationery	18	1.44	0.08	0.09	17	28.42	1.67	0.06	7	1.21	0.17	0.06
Utilities	4	80.39	20.10	0.30	8	1,136.53	147.07	2.55	1	0.10	0.10	0.10
Medical, Surgical and Pharmaceutical Supplies	2	2.60	1.30	1.30	7	46.86	6.69	0.13	3	0.0	0.0	0.0
Plant Hire	1	0.13	0.13	0.13	1	0.05	0.05	0.05	0	0.0	0.0	0.0
Grand Total	1,087	506	0.5	0.10	846	1,793	2.1	0.10	879	953.24	1.08	0.10

Landscape 2 Table 3.6: In-Year Awards By Category 2014 - 2016
 Note: Portrait Version of Table 3.6 available on page 40

Disclaimer:

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The OGP makes no representations as to the accuracy or completeness of the Data and does not represent that the Data is free from errors or omissions, or that it is exhaustive. The Data and analysis within this report is provided for informational purposes only. The OGP disclaims all warranties, representations or endorsements, express or implied, with regard to the Data and the analysis based thereon.



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Office of Government Procurement



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