RESEARCH REPORT · DATA NOVEMBER 2025 TO OCTOBER 2026

The 2027 Public Tender Report: what 304,000 tender notices and 670,000 contract awards tell bidders

How long suppliers get to respond, where the work is, and how often a contract draws only one bid.

Data: public procurement notices and award results from November 2025 to October 2026, measured by Lucius AI.

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32.9%

One in three EU open-procedure contract lots drew a single tender. Without framework agreements, as the European Commission counts it: 35.3%, against its 28% for a typical EU country in 2024.

Lots whose TED result notice states the tender count, awarded November 2025 to October 2026.

20.1%

of public tender notices gave suppliers under 10 days to respond.

56,654 of 281,669 notices from 18 sources, published November 2025 to October 2026.

12.0 vs 31.3

median days to respond: a US federal bidder on SAM.gov against an EU bidder on TED.

115,686 SAM.gov and 118,972 TED notices, published February to October 2026.

88.8%

of SAM.gov notices give less than 30 days. The FAR 30-day floor covers only non-commercial purchases above the simplified acquisition threshold.

SAM.gov notices published February to October 2026.

46.3%

of SAM.gov notices gave under 10 days in September 2026, the last month of the US federal fiscal year.

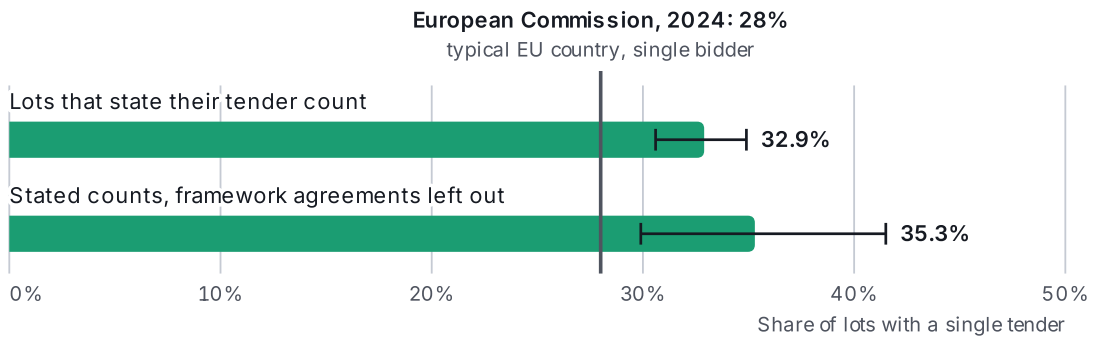
SAM.gov notices published in September 2026.

One in three EU open-procedure contract lots drew a single tender between November 2025 and October 2026.

Leave out framework agreements, as the European Commission does, and the share is 35.3%, above the 28% it gives for a typical EU country in 2024.

One in three EU open-procedure contract lots drew a single tender

Share of lots awarded under an open procedure that received one tender, with 95% ranges. The line is the European Commission's EU Single Market Scoreboard figure for 2024: 28%, the single-bidder share of a typical, mid-ranking EU country, framework agreements and direct awards left out.



Source: Lucius AI analysis of public notices, TED result notices, lots awarded November 2025 to October 2026, adjusted with a check of 400 lots read on 7 November 2026. Reference line: European Commission, EU Single Market Scoreboard, Single bidder indicator, 2024.

About this report. Two sets of public data, both from November 2025 to October 2026: 304,463 tender notices from 21 official sources indexed by Lucius AI, and 670,661 contract lots awarded under an open procedure, from result notices on TED, the EU's procurement journal. It is written for bid teams planning 2027; how we counted is in the Methodology.

Key findings

- **One in five tender notices gave suppliers under 10 days.** 56,654 of 281,669 notices (20.1%), published November 2025 to October 2026.
- **A US federal bidder gets 12 days. An EU bidder gets 31.** Medians on SAM.gov (115,686 notices) and TED (118,972), published February to October 2026.
- **Nine in ten US federal notices give less than 30 days.** 88.8% on SAM.gov.
- **Four in ten EU notices give less than 30 days from publication.** 42.7% on TED, which is not a count of breaches.

- **September is the crunch month in US federal buying.** In September 2026, 68.6% of SAM.gov notices closed within 14 days and 46.3% gave under 10 days.
- **One in three EU open-procedure contract lots drew a single tender.** 32.9% of lots whose TED result notice states the tender count; 35.3% without framework agreements.
- **Three in four notices do not state a value.** Only 24.2% of 304,463 notices give a contract value.
- **Construction is the largest category in Europe.** 17.4% of notices with a CPV code (25,578 of 146,764), median stated value EUR 492,000.

1. What we counted

Two sources carry most of the data: TED, with 132,917 notices, and SAM.gov, with 118,755.

On 7 November 2026 (06:12 UTC) our index held 343,814 public notice records from 21 sources. This report uses the 304,463 tender notices published from 1 November 2025 to 31 October 2026, after removing duplicates and Australian contract-award records, from buyers in 193 countries.

The United States leads the buyer countries with 121,178 notices, then Germany (26,343), Poland (22,207), France (17,330) and Spain (16,587). Monthly counts measure our coverage, not the market.

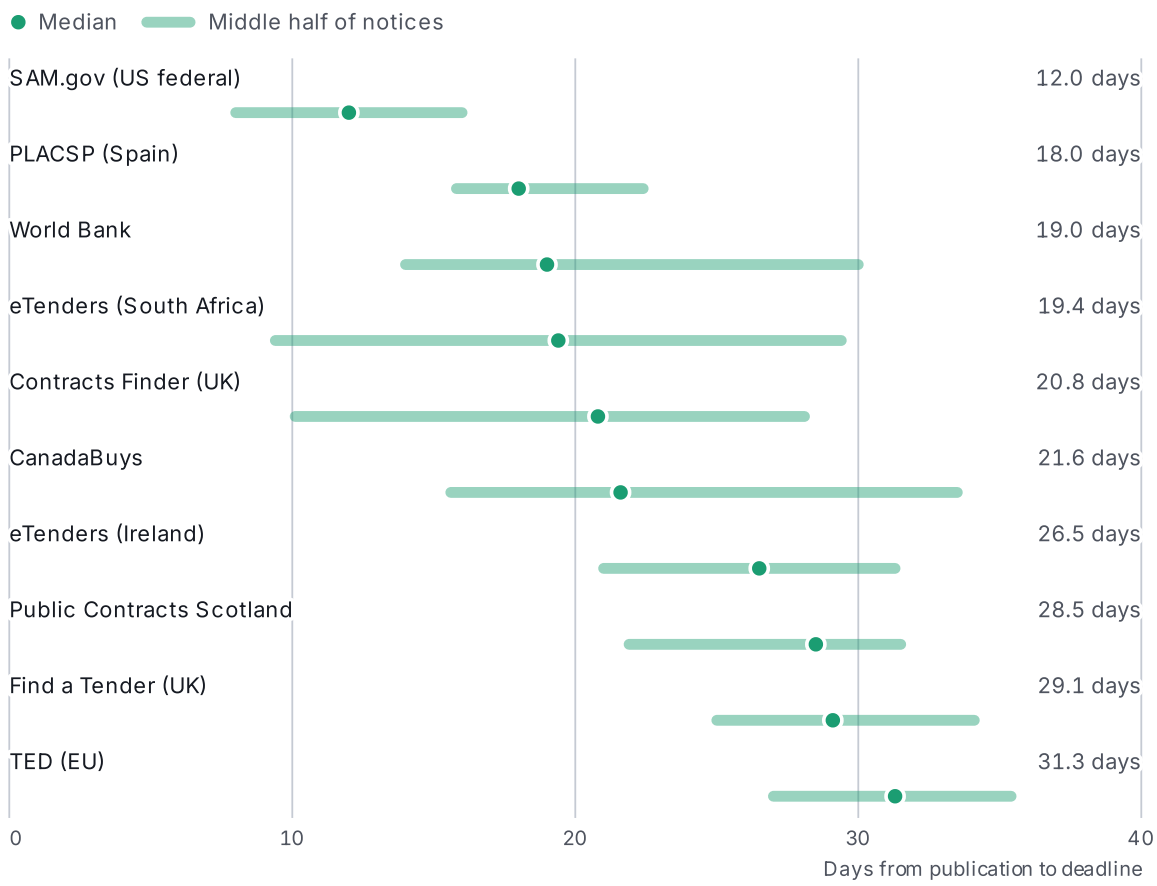
2. How long suppliers get

A US federal bidder gets 12 days to respond. An EU bidder gets 31.

The response window is the deadline stated in the notice minus its publication date, in days, for notices published 1 November 2025 to 31 October 2026 (full definition in the Methodology).

Median response window by source

Days from publication to the deadline. Dot: median. Bar: the middle half of notices (p25 to p75). Tender sources only: grants and EU funding calls are in the appendix table.



Source: Lucius AI analysis of public notices, notices published November 2025 to October 2026.

Across 18 sources (grants and EU funding calls left out), 281,669 notices, the median was 20.7 days (middle half 11.0 to 31.9). 8.6% gave 7 days or less, 20.1% under 10, 34.1% 14 or less and 67.3% 30 or less. SAM.gov and TED make up 83% of this pool, so read the per-source figures first.

Against the legal floors

SAM.gov: 88.8% of notices give less than 30 days, and three in four give 16 days or less. US federal rules (FAR 5.203) require 30 days only for non-commercial purchases above the simplified acquisition threshold, so most federal notices fall outside the rule.

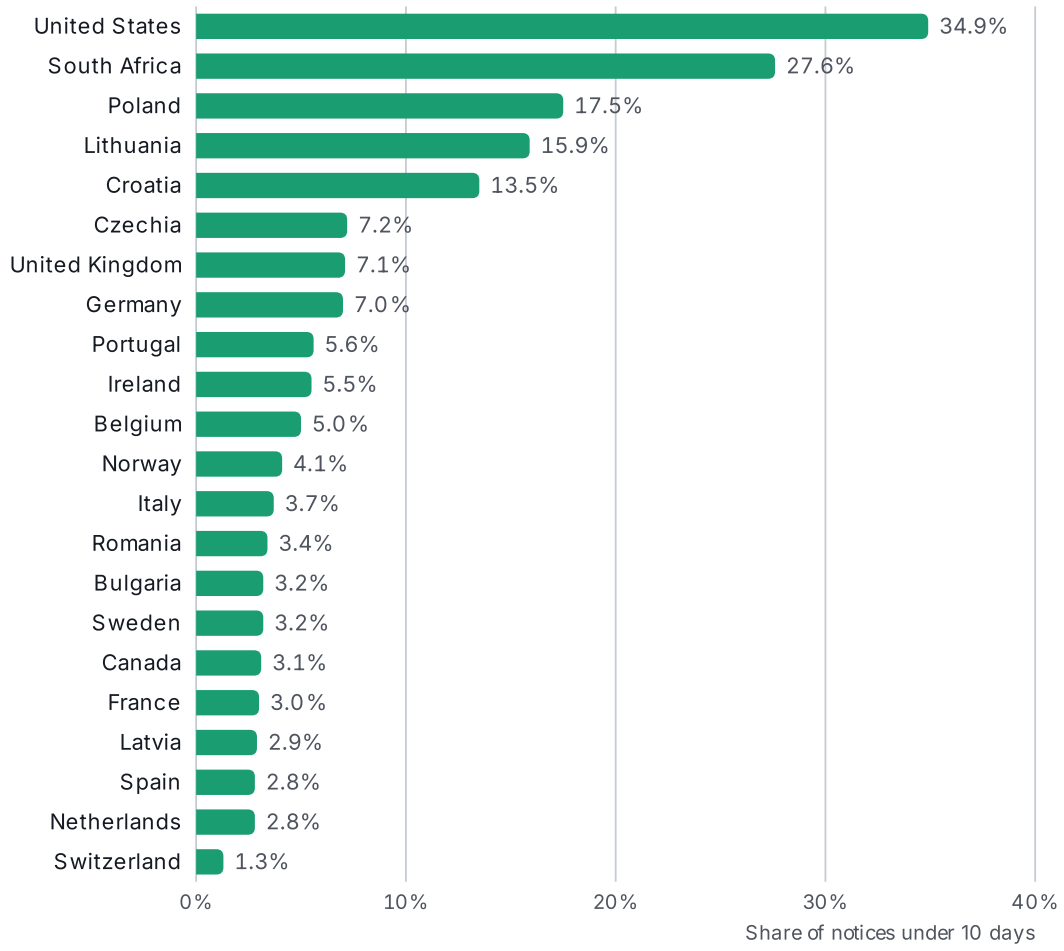
TED: 42.7% of notices give less than 30 days from publication, 30.9% give 30 to 35 days, and 26.4% give more than 35. 14.6% give less than 15 days. The EU directive's usual minimum for an open procedure is 35 days from sending the notice, 30 with electronic submission. These are not breaches: TED carries procedures other than open

ones, and the legal clock starts when the notice is sent, a few days before it is published.

By country

Share of notices giving under 10 days, by country

Countries with 1,000 or more notices, ranked by the share with a window under 10 days.



Source: Lucius AI analysis of public notices, notices published November 2025 to October 2026.

Two European markets stand out for short windows: Poland (17.5% under 10 days) and Lithuania (15.9%), against 7.0% in Germany and 3.0% in France.

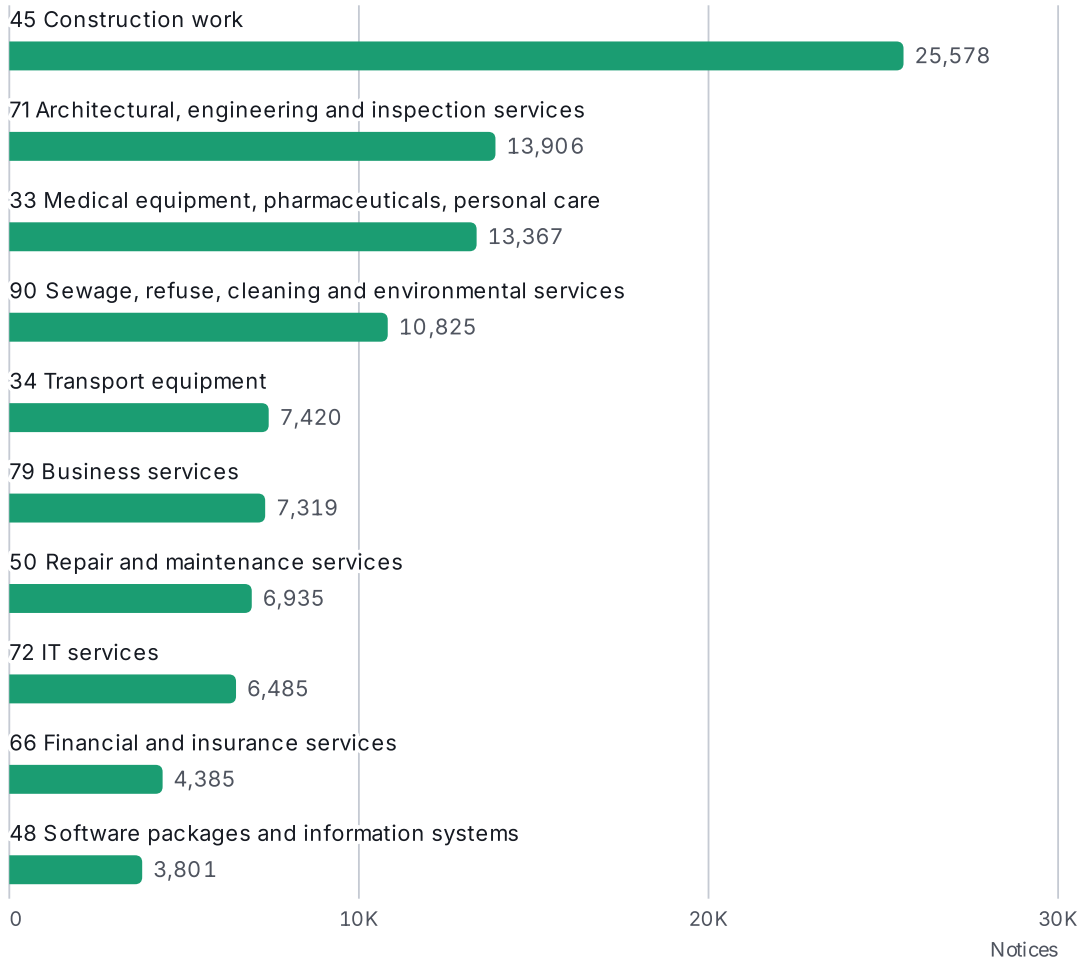
3. Where the work is

Construction is the largest category in Europe: 17.4% of notices with a CPV code.

The Common Procurement Vocabulary (CPV) is the EU's classification for public contracts. 146,764 notices from European and UK sources published November 2025 to October 2026 carry a CPV code. We count each notice once, by the first code it lists.

Top categories by number of notices

CPV division of the first code a notice lists. TED, PLACSP, Find a Tender, Contracts Finder, eTenders Ireland and Public Contracts Scotland.



Source: Lucius AI analysis of public notices, notices published November 2025 to October 2026.

Three in four notices do not state a value.

73,641 of 304,463 notices (24.2%) state a contract value, and only 28,756 (9.4%) state it with an explicit currency of euros. Sums mislead. In IT services, the 10 largest notices

hold 81.9% of the total stated value; the largest single notice states EUR 10 billion. These are framework ceilings, not spend. We rank by count and median, not by sum.

Across all sources, Lucius sector labels put Defence first with 48,916 notices, then Construction 45,904, Engineering 39,692, Manufacturing 35,876 and Facilities Management 31,982; 196,798 of 301,620 notices (65.2%) have a label. Defence ranks first because US federal notices are 39% of this sample.

4. Pass/fail gates: what this data cannot show

Our notice data cannot show which pass/fail gates suppliers miss.

A bid can fail before anyone scores it: a missing certificate, an unsigned declaration, a turnover threshold. Public notices do not report why a tender was rejected, and the notice text rarely lists the gates. In October we measured UK IT notices (309 notices): Cyber Essentials was named in 1.0% and ISO 27001 in 0.6%. The gates sit in the tender documents, not the notice.

Our June 2026 study read 136 full tender document sets and found a median of 45 mandatory requirements per tender. That remains our only pack-level figure.

5. The finding: one in three EU open-procedure contract lots drew a single tender

One in three EU open-procedure contract lots drew a single tender; without framework agreements, 35.3%, above the European Commission's 28% for a typical EU country.

We used TED result notices, one row per awarded lot: 670,661 lots awarded under an open procedure from 1 November 2025 to 31 October 2026, from 225,065 notices. A lot counts as single tender when its notice states that one tender was received.

Where a notice leaves the count out, our table holds the number of winners instead, so the raw 44.0% mixes real single tenders with missing counts. A check of 400 lots against the notices separated them: an estimated 81.7% of lots state their count.

- **32.9%** of open-procedure lots that state their tender count received a single tender (95% range 30.6% to 34.9%).

- **35.3%** when framework agreements are also left out, as the European Commission counts it (95% range 29.9% to 41.5%). Framework agreements made up an estimated 41.8% of open-procedure lots.

The EU Single Market Scoreboard puts a typical, mid-ranking EU country at 28% for 2024; the two measures differ in period, unit, procedures, buyers and sample. There is no country ranking this time, because the missing counts sit in a few countries. The chart is at the top of this report.

What to expect in 2027

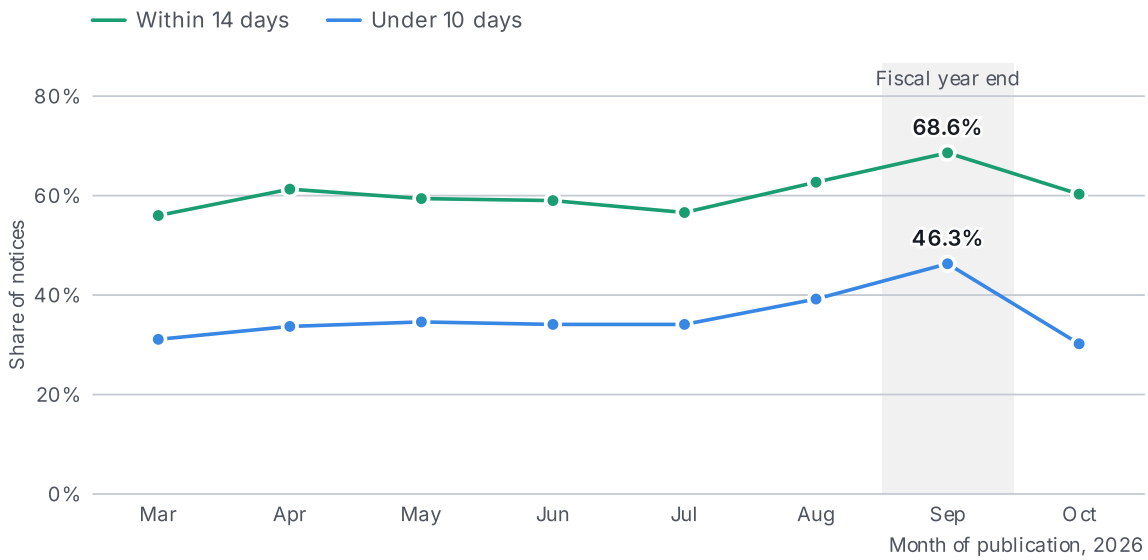
US federal windows did not move, September was the exception, and EU windows did not shorten.

We only list a trend where our 2026 data shows one.

- **US federal windows did not move.** The SAM.gov median was between 11.0 and 13.0 days in every month from March to October 2026. Nothing in 2026 points to a change in 2027.
- **September was the exception.** 68.6% of SAM.gov notices closed within 14 days in September 2026, the last month of the US federal fiscal year, against 56.0% to 62.7% from March to August. We have one fiscal year of data. If the pattern repeats, September 2027 will be the tightest month again.

SAM.gov: share of notices closing fast, by month

Share of SAM.gov notices by month of publication. February 2026 is a partial month and is left out.



Source: Lucius AI analysis of public notices, SAM.gov notices published March to October 2026.

- **EU windows did not shorten.** The TED median was 31.2 to 31.3 days in each month from July to October 2026 (29,000 to 37,000 notices a month).
- **No single-tender trend yet.** On the raw count, the share of single-tender lots fell from 47.4% (results published July to September 2025) to 39.8% (July to September 2026). The raw count mixes stated counts with missing ones, so this fall may reflect how notices are filled in rather than more competition. We will measure the trend on stated counts only in the next edition.
- **No volume forecast.** Our 2026 monthly counts track the growth of our own coverage, not the market.

Rules for bidders in 2027

1 **On SAM.gov, have your standard documents ready before the notice appears.**
The median SAM.gov window is 12.0 days, and 34.9% of notices give under 10.

2 **Keep September clear for US federal bids.**
In September 2026, 46.3% of SAM.gov notices gave under 10 days.

3 **Treat an EU prior information notice as your early warning.**

After one, the EU minimum for an open procedure can drop to 15 days (Article 27); 14.6% of TED notices gave less than 15.

4 **In the EU, make the go/no-go call in week one.**

The TED median is 31.3 days, and 42.7% of notices give less than 30.

5 **Do not filter opportunities by contract value.**

Only 24.2% of notices state one; on SAM.gov, 3 in 118,755 do.

6 **Read the award statistics before you pick a field.**

About four in five lots in TED result notices state how many tenders were received (81.7%). Use them to find the buyers and categories where few suppliers bid.

7 **Check whether a lot is a framework agreement.**

An estimated 41.8% of open-procedure lots on TED were; the orders come later, through call-offs or mini-competitions.

8 **Search EU notices by CPV division, and US notices by keyword and US codes.**

CPV codes cover 146,764 European notices; US federal notices use NAICS and PSC codes instead.

9 **Read the whole pack, not a one-pass summary.**

A general AI model asked once found 66.2% of the requirements on long packs (47 to 84 pages); see the next section.

Where general AI tools go wrong on tender packs

A general AI model asked once for every requirement in a tender pack left requirements out on every pack.

We asked Google's Gemini 4 model, on 1 November 2026, in one request per pack, to list every requirement in 18 packs of 2 to 84 pages. We compared its list with a reference from a slower reading that works through each pack in parts. The reference is machine-made, so these figures show what a one-pass answer leaves out, not absolute accuracy.

- With the pack attached and default settings, it listed 70.7% and 70.3% of the reference requirements in two runs, below the slower reading on all 18 packs. With the full text and its deepest reasoning setting, it reached 80.3% (16 packs).
- On the five longest packs (47 to 84 pages), the best setting found 66.2% of the requirements; on the other 11, 86.7%.
- Where a file passed the input limit of the tool used in the test, the rest never reached the model. That happened on 6 of 18 packs, and the answers gave no sign.
- What it listed was mostly right: 92.8% and 91.8% of its lines matched a reference requirement, and its page references were accurate 96.2% and 96.3% of the time.

> In these tests the problem was not wrong answers. It was what the model left out, without saying so.

Methodology

- **Data source.** The Lucius AI index of public procurement notices, production database, queried read-only on 7 November 2026, 06:12 to 06:22 UTC (single-tender check 06:31 to 06:45 UTC). Public notices only. No customer data.
- **Base.** Notices published 1 November 2025 to 31 October 2026 (304,463 tender notices after removing records marked as duplicates and 18,793 AusTender contract-award records). Award results: TED result notices for lots awarded in the same period (670,661 open-procedure lots). The "670,000 contract awards" in the title are these 670,661 lots awarded under an open procedure, as stated in TED result notices.
- **Sources reported.** Some national and international portals are included in totals but not reported separately, under their terms of use.
- **Response window.** Deadline in the notice minus publication date, in days. Deadline after publication, window of 365 days or less. Sources with 200 or more notices. Grants (Grants.gov) and EU funding calls (Funding & Tenders Portal) are shown but left out of pooled figures.
- **Legal floors.** Directive 2014/24/EU, Article 27 (legislation.gov.uk/eudr/2014/24/article/27); FAR 5.203, FAC 2026-01 (acquisition.gov/far/5.203), both read 7 November 2026.
- **Coverage.** Each source joined the index on its own date (see the source table in the appendix). Figures describe the notices we hold, not every notice published.

- **Deadlines.** 94.2% of notices state a deadline. Notices without one are left out of window figures. Some tender packs set a different submission date, and clarification questions often close earlier. TED publication can follow the sending of a notice by a few days, so windows counted from publication are slightly shorter than legal ones counted from sending.
- **Duplicates.** Records marked as duplicates are removed. A notice published on both TED and a national portal can appear in both; per-source figures are unaffected, country totals may count it twice.
- **Values.** Only explicit euro values are used for value figures. Totals are dominated by framework ceilings.
- **Categories.** CPV division = first two digits of the first CPV code a notice lists. Sector labels are assigned by Lucius and can be several per notice.
- **Single tender.** The number of tenders received as stated in the TED result notice (eForms statistics code "tenders"). Our award table stores that count, or the number of winners where a notice leaves it out. We separated the two with a fixed random sample of 300 single-tender lots and 100 multi-tender lots, read from each notice's XML on TED on 7 November 2026 (394 notices), weighted by the size of each group. Framework agreements were identified from each lot's framework-agreement field in the same XML. Ranges are 95% bootstrap intervals. Counts are per lot.
- **Changes from earlier figures.** Since 25 October 2026: a fixed 12-month window, duplicates removed, the AusTender figures withdrawn, some portals reported in totals only. Since June 2026: a different source mix and a 365-day cap instead of two years.
- **AI tests.** Run by us on 1 November 2026, as described in the section above. Lucius AI makes software that reads tender packs; the tests above were run by us on public documents.
- **Queries.** Every figure has a recorded query, run time and row count. Available on request.

Appendix: full tables

The full tables, coverage notes and caveats behind the figures above.

Notices by source, November 2025 to October 2026

Source	Market	Notices	First notice in the period
TED	European Union (and other countries that publish there)	132,917	17 Feb 2026
SAM.gov	United States, federal	118,755	23 Jan 2026
PLACSP	Spain	8,667	13 Nov 2025
Find a Tender	United Kingdom	7,968	7 Apr 2026
CanadaBuys	Canada, federal	4,385	3 Nov 2025
eTenders	Ireland	2,856	24 Apr 2026
Grants.gov	United States, federal grants	2,405	6 Nov 2025
eTenders	South Africa	1,891	13 Oct 2026
Contracts Finder	United Kingdom	1,749	4 Mar 2026
AusTender	Australia	1,629	11 Mar 2026
World Bank	Bank-financed projects	1,511	16 Mar 2026
Funding & Tenders Portal	European Commission	437	6 Nov 2025
Public Contracts Scotland	Scotland	298	3 Aug 2026
Uganda eGP, Zambia e-GP	Uganda, Zambia	115	9 Sep and 8 Oct 2026
Inter-American Development Bank	Bank-financed projects	114	10 Aug 2026
Other national and international portals	Included in totals, not reported separately	18,765	
No source recorded		1	
Total		**304,463**	

AusTender: 18,793 contract-award records from its main feed are left out. The remaining AusTender records are counted here but not used for response windows. The index and the counts above are the base for sections 1 to 3.

Top 20 buyer countries, November 2025 to October 2026

1. United States: 121,178
2. Germany: 26,343
3. Poland: 22,207
4. France: 17,330
5. Spain: 16,587
6. United Kingdom: 10,091
7. Czechia: 5,665
8. Italy: 5,372
9. Ireland: 5,019
10. Canada: 4,397
11. Romania: 4,187
12. Belgium: 3,634
13. Sweden: 3,464
14. Netherlands: 3,364
15. Norway: 3,210
16. Portugal: 2,602
17. Bulgaria: 2,482
18. Lithuania: 2,415
19. Switzerland: 1,992
20. Austria: 1,986

Countries whose notices come mainly from portals we do not report separately are left out of this list (see Methodology).

Coverage by month

Monthly counts in our index measure our coverage, not the market. The full TED feed arrived in July 2026: we hold 1,800 TED notices published in June 2026 and 29,051 published in July. The one source we held all year at full volume, SAM.gov, published between 12,900 and 16,726 notices a month from March to October 2026.

Response window by source

Source	Notices	Median days	Middle half (p25 to p75)	Under 10 days	14 days or less
SAM.gov (US federal)	115,686	12.0	8.0 to 16.0	34.9%	59.8%
PLACSP (Spain)	8,562	18.0	15.8 to 22.4	2.8%	6.6%
World Bank	1,511	19.0	14.0 to 30.0	8.3%	26.9%
eTenders (South Africa)	1,890	19.4	9.4 to 29.4	27.3%	35.1%
Contracts Finder (UK)	1,598	20.8	10.1 to 28.1	24.6%	32.4%
CanadaBuys	4,275	21.6	15.6 to 33.5	3.1%	9.0%
eTenders (Ireland)	2,807	26.5	21.0 to 31.3	1.6%	4.7%
Public Contracts Scotland	298	28.5	21.9 to 31.5	1.0%	2.3%
Find a Tender (UK)	7,165	29.1	25.0 to 34.1	3.4%	7.8%
TED (EU)	118,972	31.3	27.0 to 35.4	7.6%	12.6%
Grants.gov (US grants)	2,173	47.0	31.0 to 79.3	4.0%	6.2%

Source	Notices	Median days	Middle half (p25 to p75)	Under 10 days	14 days or less
Funding & Tenders Portal (EU funding calls)	396	176.2	120.2 to 330.2	0.0%	0.0%

Coverage differs by source: eTenders South Africa from 13 October 2026; TED, SAM.gov, Find a Tender and others from the dates in the source table. We do not report an Australian response window: most Australian records in our index are contract awards, not open tenders.

The legal floors in full

- **European Union.** Directive 2014/24/EU, Article 27, sets the minimum for an open procedure at "35 days from the date on which the contract notice was sent". A buyer may cut it by 5 days when tenders are submitted electronically. It may cut it to 15 days after a prior information notice that met the Directive's conditions, and to no less than 15 days in a duly substantiated urgency. Source: legislation.gov.uk/eudr/2014/24/article/27.
- **United States, federal.** FAR 5.203 (FAC 2026-01, effective 13 March 2026) requires "at least a 30-day response time" from the date a solicitation is issued, but only for non-commercial purchases expected to exceed the simplified acquisition threshold. For commercial products and services, and for purchases above USD 25,000 up to that threshold, the contracting officer sets a response time that gives suppliers a reasonable opportunity to respond. Agencies must also publish a notice at least 15 days before issuing a solicitation, a period that can be shortened for commercial purchases. Source: acquisition.gov/far/5.203.

Our SAM.gov data does not record which notices are commercial or above the threshold, so we cannot split them.

Response window by country (1,000 or more notices)

Country	Notices	Median days	Under 10 days	14 days or less
United States	115,703	12.0	34.9%	59.8%
South Africa	1,936	19.3	27.6%	35.7%
Canada	4,285	21.6	3.1%	9.0%
Spain	16,191	25.5	2.8%	6.4%
Ireland	4,407	28.0	5.5%	9.1%
United Kingdom	9,125	28.1	7.1%	11.9%

Country	Notices	Median days	Under 10 days	14 days or less
Poland	21,932	28.3	17.5%	28.3%
Portugal	2,520	28.7	5.6%	11.8%
Croatia	1,757	29.0	13.5%	29.1%
Latvia	1,702	29.3	2.9%	7.2%
Germany	21,032	30.5	7.0%	10.4%
Bulgaria	2,379	30.9	3.2%	6.1%
Sweden	2,994	31.0	3.2%	4.8%
Czechia	5,238	31.2	7.2%	12.1%
Lithuania	2,049	32.2	15.9%	21.5%
Norway	2,653	32.5	4.1%	7.4%
Romania	4,112	33.0	3.4%	7.7%
Belgium	2,741	33.3	5.0%	9.7%
France	15,748	33.4	3.0%	5.0%
Italy	5,259	34.4	3.7%	6.8%
Switzerland	1,949	40.4	1.3%	2.1%
Netherlands	2,723	47.5	2.8%	5.2%

What changed since our October figures

Our previous cut of this data, on 25 October 2026, gave per-source medians. With the same window definition, the main ones are unchanged: SAM.gov 12.0 days, TED 31.3, Find a Tender 29.2 then and 29.1 now, Contracts Finder 20.8, PLACSP 18.0. One change: **the 43.5-day AusTender figure is withdrawn.** Most of the notices behind it were contract-award records whose end dates had been read as bid deadlines. We no longer report an Australian window.

Our June 2026 study gave a 14-day overall median (13.9 days after its October correction). It covered 50,673 tenders to 31 May 2026, mostly from the United States. The 20.7 days here is not a lengthening of windows: the mix of sources changed, with far more EU notices.

CPV divisions (European and UK sources)

CPV division	Notices	Share	Notices with a value in EUR	Median value (EUR)
45 Construction work	25,578	17.4%	4,189	492,000
71 Architectural, engineering and inspection services	13,906	9.5%	2,202	350,000
33 Medical equipment, pharmaceuticals, personal care	13,367	9.1%	2,073	459,035
90 Sewage, refuse, cleaning and environmental services	10,825	7.4%	1,823	630,000
34 Transport equipment	7,420	5.1%	1,407	364,794
79 Business services	7,319	5.0%	1,858	382,709
50 Repair and maintenance services	6,935	4.7%	1,788	480,000
72 IT services	6,485	4.4%	1,338	667,758
66 Financial and insurance services	4,385	3.0%	873	490,000
48 Software packages and information systems	3,801	2.6%	653	339,840

Notices from TED, PLACSP, Find a Tender, Contracts Finder, eTenders Ireland and Public Contracts Scotland carry a CPV code. Values are explicit euro values only.

Single tender: how we checked

Definition. TED result notices, one row per awarded lot. Lots awarded 1 November 2025 to 31 October 2026 (award date from the notice; publication date where the award date is missing), open procedure only: 670,661 lots from 225,065 notices. Single tender = the notice states that one tender was received.

Our award table stores the number of tenders a notice states. Where a notice leaves it out, the table holds the number of winners instead, which is usually one. On that raw count, 44.0% of lots look like single-tender lots. To separate real single tenders from missing counts, we took a fixed random sample of 300 single-tender lots and 100 lots with two or more tenders, and read each notice's XML on TED (394 notices, read on 7 November 2026):

- 61.0% of the single-tender lots (183 of 300) state a count of 1. The other 39.0% (117) state no count at all.
- 98 of the 100 multi-tender lots state their count.
- An estimated 81.7% of all open-procedure lots state their count.

The EU Single Market Scoreboard (public procurement, Indicator [1], Single bidder) measures "the proportion of contracts awarded where there was just a single bidder". It leaves out framework agreements and direct awards. For 2024 it shows an EU average of 28%, defined as the value of a typical, mid-ranking EU country. Source: single-market-scoreboard.ec.europa.eu. Our 35.3% is above that. The two measures differ in five ways:

1. **Period.** The Scoreboard covers 2024; we cover November 2025 to October 2026.
2. **Unit.** We pool lots across countries, so countries with many lots weigh more: Poland and Romania hold 49% of the open-procedure lots. The Scoreboard's EU average is one typical country's value.
3. **Procedures.** We count open procedures only. The Scoreboard also counts other procedures that start with a call for competition.
4. **Buyers.** TED also carries buyers outside the EU, such as Switzerland and Norway. They are in our figure.
5. **Sample.** Our adjustment for missing counts and framework agreements rests on a 400-lot check, hence the ranges above.

Why there is no country ranking this time. The lots without a stated count are not spread evenly. In our sample they made up 9 of 10 single-tender lots from Lithuania, 18 of 22 from Italy, 20 of 27 from France, 46 of 93 from Poland and 14 of 28 from Germany, and none of the 61 from Romania or the 10 from Spain. A country or category ranking built on the raw count would mostly show how notices are filled in. We will publish rankings when every lot's count is read from its notice. The raw single-tender trend is uneven for the same reason: the gaps sit in a few countries.

Pass/fail gates: how we plan to measure them

1. **EU award results.** EU result notices can report how many tenders the buyer checked and found inadmissible (eForms statistics code t-verif-inad). In our check of 400 award lots, 39 lots carried that figure and 8 reported at least one inadmissible tender. That is too few to publish a rate. We will read it across all lots for a later edition.
2. **Selection criteria in EU contract notices.** Structured fields for turnover, insurance and certification thresholds, counted across notices.
3. **A study of public tender packs.** Read a set of public packs in full and count the pass/fail conditions, with a page reference for each.

The AI test in full

The test. Google's Gemini 4 model, 1 November 2026. 18 packs, 2 to 84 pages: 17 public tender packs (9 from UK public buyers, 4 US solicitations, 2 from Lebanon, 1 from

India, 1 from Enabel, the Belgian development agency) and one 2-page test pack we wrote. The reference list comes from a slower reading of each pack that works through the documents in 10-page parts and then checks for missed items. Run a second time, that slower reading matches 95.6% of its own reference. The reference is machine-made, not a human count.

1. **It left requirements out, on every pack.** With the pack attached and default settings, the model listed 70.7% and 70.3% of the reference requirements in two runs. It scored below the slower reading on all 18 packs. With the full text of every file in the prompt and its deepest reasoning setting, it reached 80.3% (16 packs).
2. **Long packs suffered most.** On the five longest packs (47 to 84 pages), the best setting found 66.2% of the requirements. On the other 11 it found 86.7%.
3. **It merged lists.** On the pages it did read, it listed 77% to 78% of the reference requirements. It folded numbered items into fewer lines: lettered lists of exclusion grounds, lists of US federal contract clauses, payment and invoice conditions.
4. **It did not say when it stopped reading.** Where a file passed the input limit of the tool used in the test (80 pages or 80,000 characters a file), the rest never reached the model. That happened on 6 of 18 packs. The answers gave no sign. 720 reference requirements sat past the cut; the model found 8% and 11% of them in two runs.
5. **It sometimes declined to quote the pack.** On 2 of 18 packs, the model's search of the documents returned nothing, because it stopped rather than repeat the text word for word.

- **What it listed was mostly right.** 92.8% and 91.8% of the lines it listed matched a reference requirement, level with the slower reading's 92.9% on a re-run.
- **Its page references were accurate.** The quote it gave was on the page it cited 96.2% and 96.3% of the time, against 96.1% for the slower reading (15 packs in Latin script).

Download the data

The key tables of this report in one CSV file, one figure per row, under CC BY 4.0. The full report is also available as a PDF.

Columns

table	Which table the row belongs to (listed under Tables).
label	The row: a source, country, month, CPV division or measure.
measure	What the value measures, for example median_days or share_under_10_days.

value	The figure, as published (percentages to one decimal).
unit	notices, lots, days, percent or EUR.
period	The period the figure covers, as an ISO 8601 interval.
definition	How the figure was counted.

Tables

notices_by_source	Tender notices by source, November 2025 to October 2026.
top_countries	Top 20 buyer countries by notices.
window_by_source	Response window by source: notices, median, p25, p75, share under 10 days, share 14 days or less.
window_pooled	Response window across 18 tender sources together.
window_by_country	Response window by country, 1,000 or more notices.
sam_gov_monthly	SAM.gov by month, March to October 2026.
cpv_divisions	Top 10 CPV divisions, European and UK sources.
single_tender	Single-tender share of EU open-procedure lots, with 95% ranges.

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