

Public Procurement  
within the architectural profession  
in Europe

alice

Extract from the ACE Sector Studies  
2016-2022



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### About this survey

Data sourced from the ACE Sector Study. This is a survey of architects throughout Europe. The methodology has been consistent during the entire survey period. Data reported here go back to the 2016 survey although earlier data are less complete. The questions relating to public procurement have been developed since the survey started. Data for the years 2020 and 2022 are directly compatible with each other for all topics.

Please note, not all countries participated every year. Therefore there may be gaps within a country's historic data and the composition of the total ('EUROPE') will vary from year to year.

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# 1. Introduction

Public procurement is a highly legal process for the acquisition of goods, services and building work in the European Union with high impact on the daily lives of its citizens and “consuming considerable sums of money...” The collection of economic data is fundamental to understanding the fitness for purpose of the applicable rules. Therefore, this sub-study is absolutely necessary for ACE to learn about the effects of certain legal mechanisms, and their consequences for architectural practices to be able to access public procurement.

It is satisfying to note that success rates are generally increasing in the majority of Member States. This means that once practices get to the heart of the matter of submitting a bid, the investment made is paying off. This is a positive sign for the attractiveness of public markets.

“Once practices get to the heart of the matter of submitting a bid, the investment made is paying off”

“The path to submitting a bid is still blocked for too many companies”

Nevertheless, the positive results shown in this analysis should not mask a reality that also appears in the figures of this study. The path to submitting a bid is still blocked for too many companies: the perceived high management costs, the turnover requirements or the experience criteria are detrimental to competition and hinder the access of smaller companies.

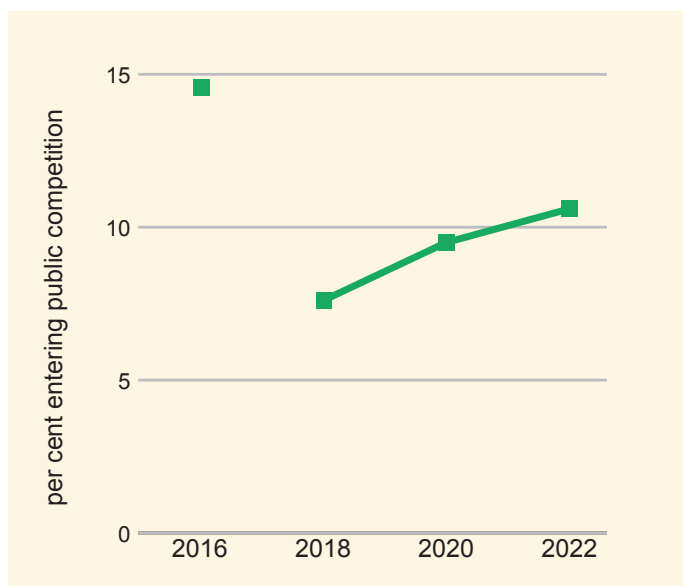
ACE works to disseminate best practice in public procurement, particularly by highlighting the value of architectural design competitions. These figures show that there is still work to be done on certain legal constraints, too often introduced in an unnecessary manner, which limit the access of young practices or new entrants to the public procurement market. The different approaches taken by the Member States are also undoubtedly at the origin of the disparities observed between the countries covered by this study.

## 2. Participation

### Participation in public competitions including OJEU bids has grown since 2018

The initial 2016 data suggested a high rate of participation although the question was asked in a slightly different way then, and may not be strictly comparable to later data.

CHART 1  
PROPORTION OF PRACTICES ENTERING PUBLIC SECTOR DESIGN COMPETITIONS, 2016-22

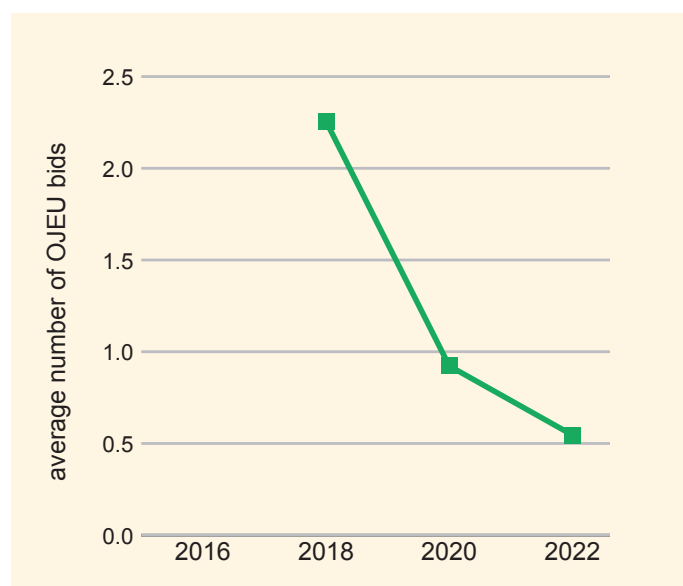


question wording different in 2016, not directly compatible

### There has been a decline in the number of bids for OJEU projects submitted by practices

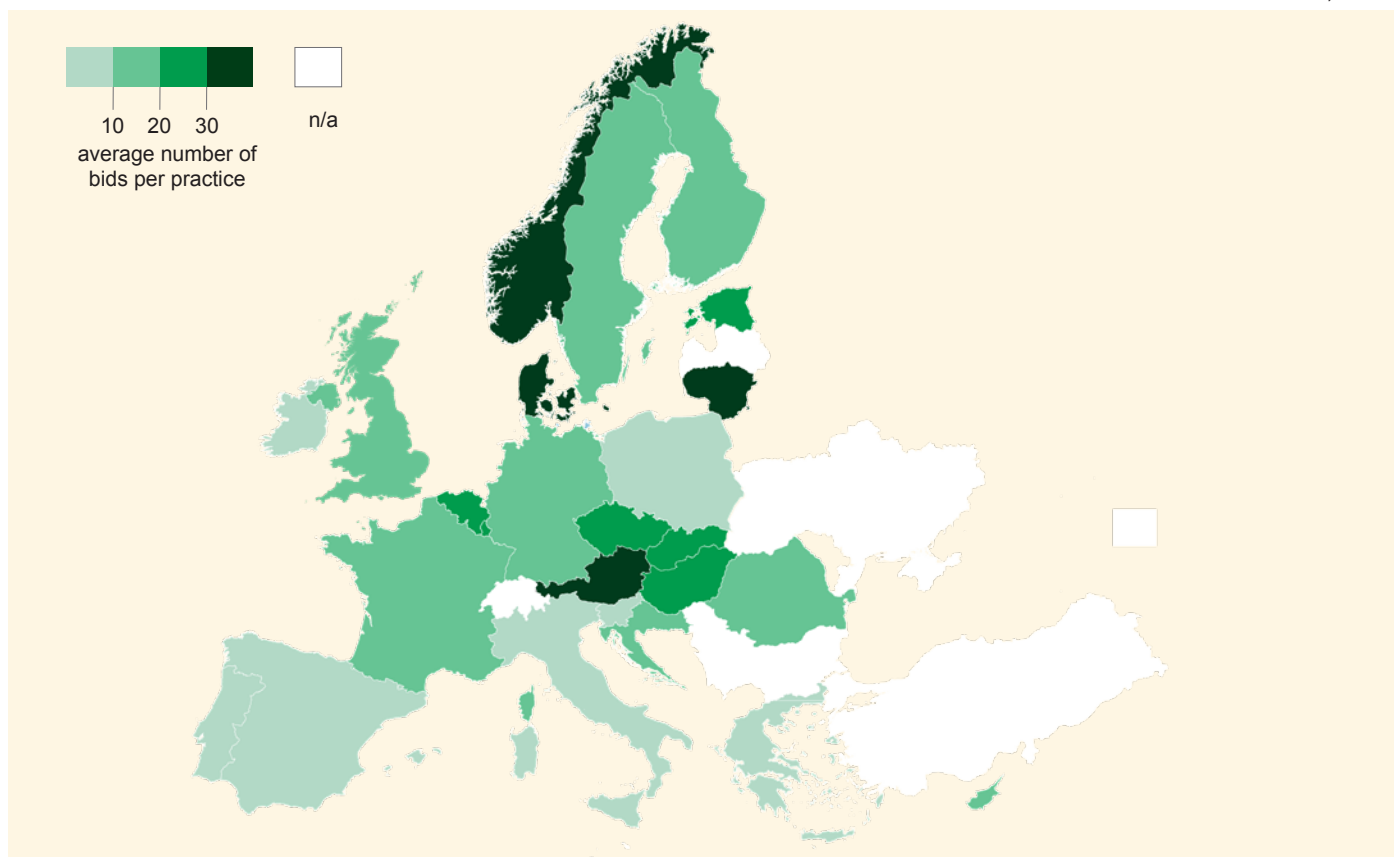
The latest data show practices each submitted, on average, less than one bid for an OJEU project in the year.

CHART 2  
AVERAGE NUMBER OF BIDS SUBMITTED FOR OJEU PER PRACTICE, 2016-22



question was not asked in 2016

CHART 3  
AVERAGE NUMBER OF PRACTICES PARTICIPATING IN PUBLIC SECTOR ARCHITECTURAL DESIGN COMPETITIONS, 2022



### 3. Success Rates

**Success rates for public architectural design competitions including OJEU bids were 42 per cent in 2022**  
 This rate was higher than in 2020 but similar to years before that. This is a relatively high success rate, but “success” in a competition or OJEU does not imply that architectural practice went on to design the building that was ultimately constructed - see the panel below. It is worth stressing, however, that this analysis does not take account of a practice’s size (insufficient data). Chart 5 suggests there is no link between success and the number of project bids submitted.

#### “Success”

“Success” in a public project can mean multiple things. It will include being successful at the first stage of a competition and thus progressing on to the second stage; or being successfully invited on to a selected procedure; or being successfully awarded a prize in an architectural competition which could be second or third prize. The word “success” is not defined in the survey questionnaire, so responding architects would have interpreted the word freely.

CHART 4  
 TRENDS IN AVERAGE SUCCESS RATE ACHIEVED FOR PUBLIC SECTOR DESIGN COMPETITIONS, 2016-2022

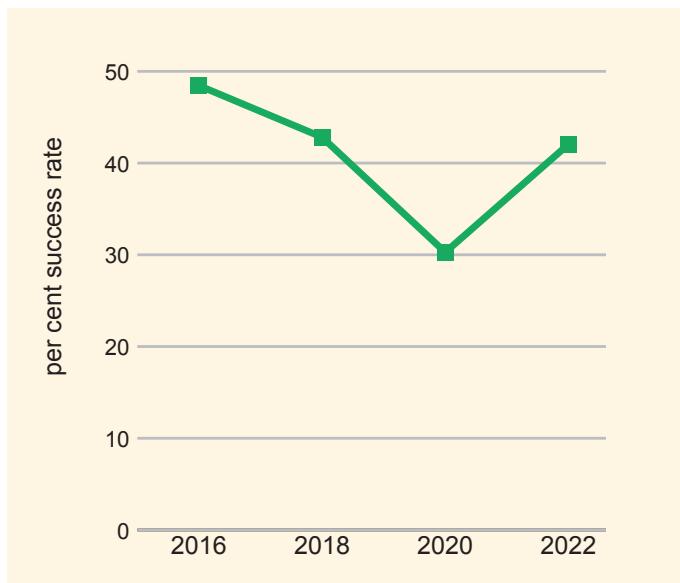
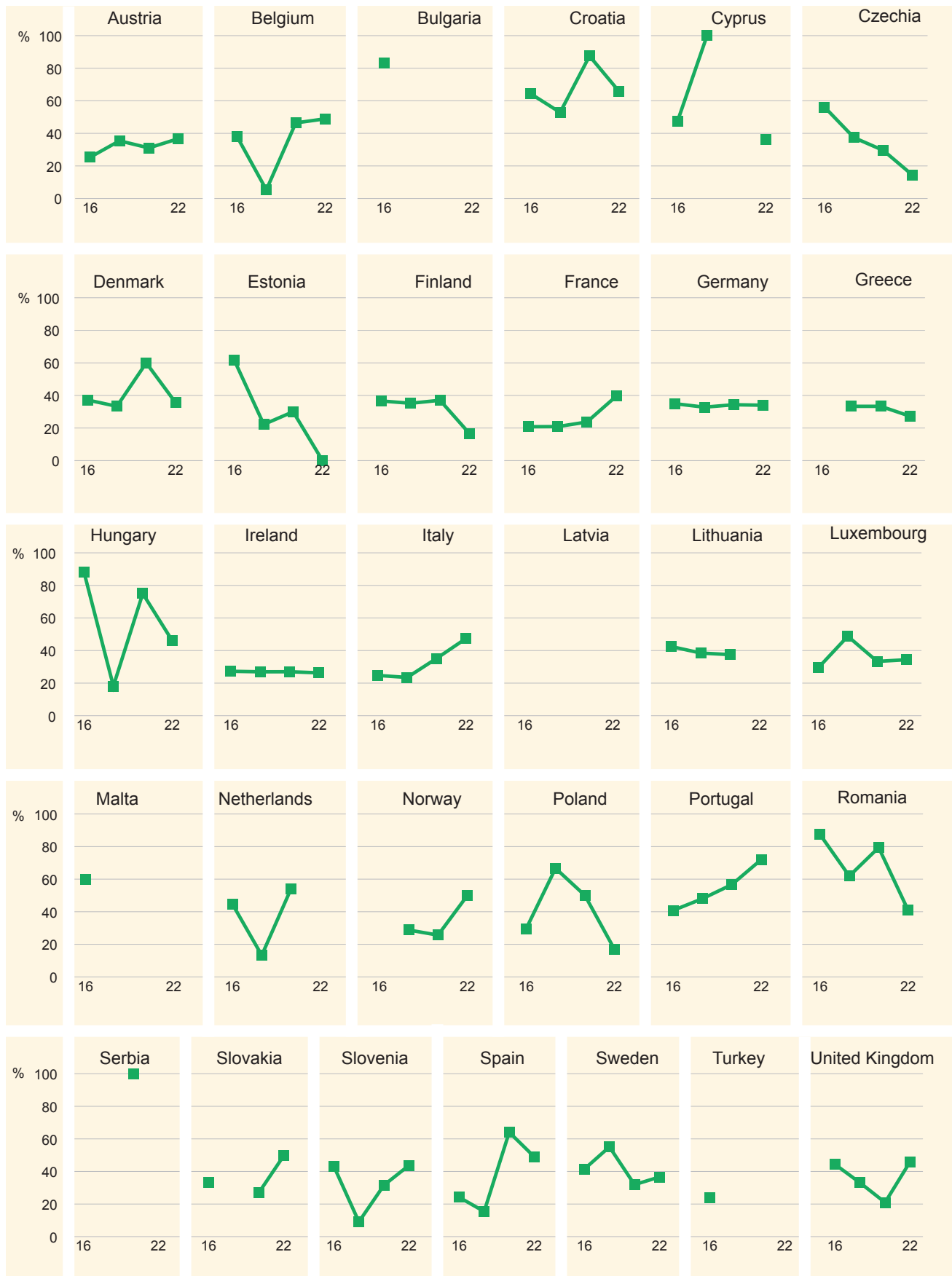


CHART 5  
 AVERAGE SUCCESS RATES ACHIEVED & AVERAGE NUMBER OF BIDS SUBMITTED BY COUNTRY, 2022



**Success rates have moved up over time in a majority of countries**

**CHART 6**  
**AVERAGE SUCCESS RATES ACHIEVED FOR PUBLIC ARCHITECTURAL DESIGN COMPETITIONS BY COUNTRY, 2016-22**



## 4. Difficulties experienced in making OJEU bids

### Approaching half of practices say submitting OJEU bids are “too onerous”.

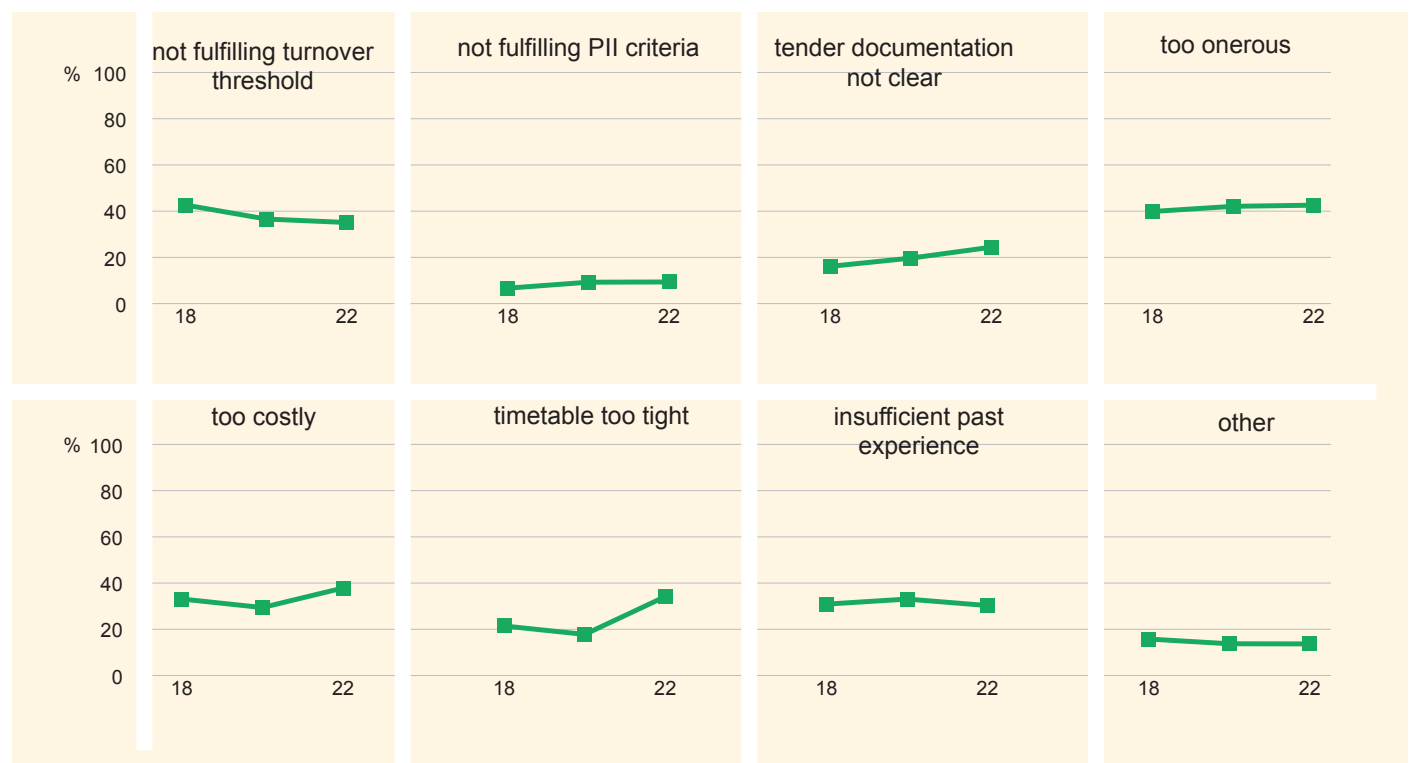
About one in three practices feel it would be “too costly” to submit a bid, or the timetable would be too tight. A similar proportion do not submit OJEU bids because they do not fulfil the turnover threshold.

Tracked over time, the turnover threshold appears to have become less of a problem but architects appear to be more concerned with the practical issues of submitting a bid. More practices do not make OJEU bids because they consider the process to be too costly, or because the timetable is too tight. There has also been a rise in the proportion of practices saying the tender document is not clear.

CHART 7  
DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS, 2022



CHART 8  
DIFFICULTIES EXPERIENCED BY PRACTICES IN THE OJEU BIDDING PROCESS, TRENDS 2016-22



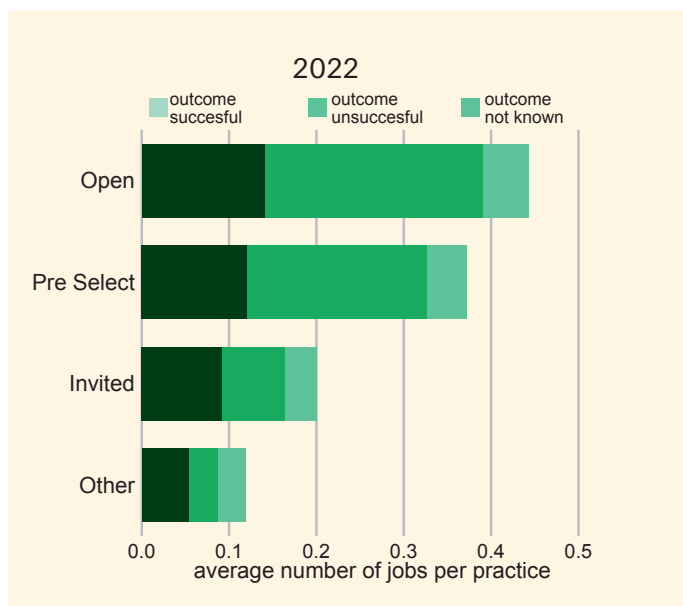


## 5. Types of public sector bids made

### More bids made for public sector open competitions than any other type

Not all practices provided this information but for those that did, about one third of public sector bids were for open competitions, nearly as many for open competitions with a pre-selection procedure and another third were either invited competitions or 'other' types of competition.

CHART 9  
TYPES OF PUBLIC SECTOR BIDS MADE, 2022



Note: not all respondents who confirmed they had made a bid for an OJEU project provided information about the types of bids made, therefore the sum of the average number of bids shown in the chart above will not necessarily equal the average number of bids given in section 1.

Types of Architectural Design Competitions in full:  
 open = open competition  
 pre-select = competition with pre-selection procedure  
 invited = invited competition  
 other = other type of competition



## Statistical Tables

TABLE 1  
PROPORTION OF PRACTICES ENTERING A PUBLIC  
SECTOR ARCHITECTURAL DESIGN COMPETITION,  
ANALYSED BY COUNTRY, 2016-22

	2016	2018	2020	2022
Austria	38	40	21	38
Belgium	24	19	14	20
Bulgaria	12	n/a	n/a	n/a
Croatia	7	5	n/a	17
Cyprus	9	14	n/a	17
Czech Republic	14	13	6	28
Denmark	19	6	3	41
Estonia	42	16	18	20
Finland	23	8	17	16
France	31	26	14	13
Germany	14	5	11	13
Greece	n/a	3	3	4
Hungary	7	11	7	23
Ireland	10	11	15	7
Italy	13	6	10	2
Latvia	n/a	n/a	n/a	n/a
Lithuania	7	9	19	47
Luxembourg	25	31	18	28
Malta	9	1	n/a	n/a
Netherlands	13	18	2	n/a
Norway	n/a	10	13	32
Poland	31	11	14	5
Portugal	9	4	2	5
Romania	21	3	2	13
Serbia	n/a	n/a	n/a	n/a
Slovakia	16	n/a	9	26
Slovenia	21	12	11	4
Spain	17	21	14	6
Sweden	6	4	16	11
Switzerland	n/a	n/a	n/a	n/a
Turkey	11	n/a	n/a	n/a
United Kingdom	9	6	5	13
EUROPE	15	8	9	11

TABLE 2  
AVERAGE NUMBER OF PUBLIC SECTOR ARCHITECTURAL  
DESIGN COMPETITIONS ENTERED PER PRACTICE,  
ANALYSED BY COUNTRY, 2016-22

	2016	2018	2020	2022
Austria	5.4	3.9	3.4	5.4
Belgium	8.6	37.8	50.2	15.7
Bulgaria	2.9	0.0	0.0	0.0
Croatia	3.3	9.2	1.6	2.4
Cyprus	3.0	3.5	0.0	2.8
Czech Republic	7.1	3.7	3.0	3.6
Denmark	7.8	3.9	1.0	13.0
Estonia	5.6	1.3	10.0	2.0
Finland	3.4	3.2	4.2	14.3
France	9.0	8.9	9.4	14.2
Germany	2.6	3.0	3.6	0.4
Greece	0.0	0.7	1.0	1.5
Hungary	9.9	3.7	2.0	2.6
Ireland	3.0	7.4	7.6	2.2
Italy	3.8	5.0	4.5	2.5
Latvia	0.0	0.0	0.0	0.0
Lithuania	2.0	1.2	1.6	8.0
Luxembourg	4.5	6.6	2.4	2.9
Malta	1.0	1.5	0.0	0.0
Netherlands	3.3	35.2	8.4	0.0
Norway	0.0	6.6	2.5	3.0
Poland	4.7	9.0	3.0	5.7
Portugal	1.8	2.1	2.4	3.8
Romania	3.4	1.0	1.7	10.1
Serbia	n/a	n/a	n/a	n/a
Slovakia	2.8	0.0	5.5	2.9
Slovenia	3.9	3.2	2.9	2.1
Spain	4.2	6.3	3.2	10.0
Sweden	3.3	3.3	6.3	5.9
Switzerland	0.0	0.0	0.0	0.0
Turkey	3.0	0.0	0.0	0.0
United Kingdom	2.1	3.5	2.1	8.8
EUROPE	4.0	7.8	7.4	1.1

TABLE 3  
PROPORTION OF PUBLIC SECTOR ARCHITECTURAL DESIGN COMPETITION BIDS MADE BY TYPE OF COMPETITION,  
ANALYSED BY COUNTRY, 2016-22  
ALL TYPES OF COMPETITIONS ENTERED FOR EACH COUNTRY EACH YEAR SUM TO 100%

	2016					2018					2020					2022				
	open	pre-select	invited	other	ALL	open	pre-select	invited	other	ALL	open	pre-select	invited	other	ALL	open	pre-select	invited	other	ALL
Austria	35	23	26	15	100	43	25	24	8	100	38	29	27	6	100	45	24	25	6	100
Belgium	48	38	11	3	100	53	27	19	0	100	8	45	47	0	100	13	42	45	0	100
Bulgaria	67	7	25	1	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Croatia	28	0	59	14	100	25	0	14	61	100	38	0	13	50	100	84	6	10	0	100
Cyprus	42	25	25	8	100	29	29	29	14	100	n/a	n/a	n/a	n/a	n/a	64	27	9	0	100
Czech Republic	51	12	37	0	100	73	8	12	8	100	61	6	17	16	100	41	3	10	45	100
Denmark	4	70	17	9	100	13	78	7	2	100	40	20	40	0	100	23	77	0	0	100
Estonia	93	0	4	3	100	78	0	22	0	100	100	0	0	0	100	100	0	0	0	100
Finland	43	24	25	7	100	60	8	21	11	100	49	23	25	3	100	76	24	0	0	100
France	32	54	6	8	100	19	72	3	7	100	39	47	2	12	100	25	47	14	14	100
Germany	29	36	23	12	100	24	54	17	5	100	31	49	15	5	100	28	46	19	8	100
Greece	n/a	n/a	n/a	n/a	n/a	80	20	0	0	100	67	33	0	0	100	59	12	24	6	100
Hungary	9	3	88	0	100	100	0	0	0	100	13	38	50	0	100	46	23	31	0	100
Ireland	47	30	22	1	100	53	22	19	6	100	40	48	11	1	100	40	60	0	0	100
Italy	57	19	11	13	100	47	30	13	11	100	52	13	10	25	100	45	30	20	5	100
Latvia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Lithuania	71	6	6	18	100	62	0	8	31	100	63	25	13	0	100	100	0	0	0	100
Luxembourg	29	45	15	10	100	22	59	7	13	100	35	42	15	8	100	28	42	21	9	100
Malta	100	0	0	0	100	83	0	17	0	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	26	51	19	4	100	36	28	34	3	100	20	78	0	2	100	n/a	n/a	n/a	n/a	n/a
Norway	n/a	n/a	n/a	n/a	n/a	39	49	10	2	100	26	55	12	7	100	17	71	13	0	100
Poland	72	17	5	6	100	33	0	67	0	100	44	0	0	56	100	83	6	8	4	100
Portugal	60	3	29	8	100	59	4	33	5	100	35	16	37	12	100	39	10	28	23	100
Romania	4	8	54	33	100	70	9	13	9	100	80	13	5	3	100	91	1	8	0	100
Serbia	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	100	0	0	0	100	n/a	n/a	n/a	n/a	n/a
Slovakia	53	19	22	7	100	n/a	n/a	n/a	n/a	n/a	68	8	21	3	100	69	8	22	1	100
Slovenia	29	5	59	7	100	81	19	0	0	100	74	4	9	13	100	70	15	9	6	100
Spain	53	13	24	10	100	84	5	11	0	100	63	21	16	0	100	65	2	33	0	100
Sweden	22	25	28	25	100	18	48	24	10	100	12	20	62	6	100	19	10	5	65	100
Switzerland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Turkey	75	10	11	3	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	22	50	20	8	100	33	31	28	8	100	36	47	15	2	100	7	3	3	88	100
EUROPE	41	31	17	10	100	40	33	20	7	100	32	39	23	7	100	39	33	18	11	100

Types of Architectural Design Competitions in full:

open = open competition

pre-select = competition with pre-selection procedure

invited = invited competition

other = other type of competition

TABLE 4  
ALL PUBLIC SECTOR DESIGN COMPETITIONS,  
BID SUCCESS RATE, ANALYSED BY COUNTRY, 2016-22

	2016	2018	2020	2022
Austria	25	35	31	37
Belgium	38	5	46	49
Bulgaria	83	n/a	n/a	n/a
Croatia	64	53	88	66
Cyprus	48	100	n/a	36
Czech Republic	56	37	30	14
Denmark	37	33	60	36
Estonia	62	22	30	0
Finland	37	35	37	17
France	21	21	24	40
Germany	35	33	34	34
Greece	n/a	33	33	27
Hungary	88	18	75	46
Ireland	27	27	27	26
Italy	25	23	35	47
Latvia	n/a	n/a	n/a	n/a
Lithuania	42	38	38	0
Luxembourg	30	49	33	34
Malta	0	60	n/a	n/a
Netherlands	45	13	54	n/a
Norway	n/a	29	26	50
Poland	30	67	50	17
Portugal	41	48	57	72
Romania	88	62	79	41
Serbia	n/a	n/a	100	n/a
Slovakia	33	n/a	27	50
Slovenia	43	9	32	44
Spain	24	15	64	49
Sweden	41	55	32	37
Switzerland	n/a	n/a	n/a	n/a
Turkey	24	n/a	n/a	n/a
United Kingdom	44	33	21	46
EUROPE	31	43	30	42

TABLE 5  
AVERAGE NUMBER OF BIDS SUBMITTED TO THE OJEU  
PER PRACTICE, ANALYSED BY COUNTRY, 2016-22

	2016	2018	2020	2022
Austria	n/a	2.7	1.1	1.4
Belgium	n/a	18.9	1.4	1.0
Bulgaria	n/a	n/a	n/a	n/a
Croatia	n/a	5.2	0.2	0.6
Cyprus	n/a	0.9	0.2	n/a
Czech Republic	n/a	3.0	n/a	0.9
Denmark	n/a	3.1	0.1	8.4
Estonia	n/a	1.8	0.2	n/a
Finland	n/a	2.4	0.6	5.9
France	n/a	4.3	2.1	1.8
Germany	n/a	0.9	0.8	0.5
Greece	n/a	4.7	0.8	0.2
Hungary	n/a	0.9	0.9	0.8
Ireland	n/a	4.0	3.8	2.6
Italy	n/a	1.2	0.8	0.6
Latvia	n/a	n/a	n/a	n/a
Lithuania	n/a	0.6	1.0	n/a
Luxembourg	n/a	2.5	1.5	2.1
Malta	n/a	5.0	n/a	n/a
Netherlands	n/a	23.6	2.2	n/a
Norway	n/a	5.0	0.9	3.1
Poland	n/a	1.5	9.1	0.4
Portugal	n/a	0.6	0.1	0.3
Romania	n/a	0.3	0.1	0.1
Serbia	n/a	n/a	n/a	n/a
Slovakia	n/a	n/a	0.7	0.1
Slovenia	n/a	0.8	0.3	0.2
Spain	n/a	2.3	0.4	1.8
Sweden	n/a	2.1	3.2	1.4
Switzerland	n/a	n/a	n/a	n/a
Turkey	n/a	n/a	n/a	n/a
United Kingdom	n/a	1.0	0.8	0.2
EUROPE	n/a	2.3	0.9	0.5

TABLE 6  
PROPORTION OF ARCHITECTS REPORTING DIFFICULTIES WITH THE OJEU PROCESS, ANALYSED BY COUNTRY, 2016-22

	2018	2020	2022	all reporting difficulty in 2022							
				Turnover	PII	Not Clear	Onerous	Costly	Timetable	Past Experience	Other
Austria	72	71	78	49	18	28	33	31	28	10	9
Belgium	83	74	82	39	14	7	25	43	36	29	29
Bulgaria	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Croatia	67	n/a	65	25	14	20	33	37	25	18	12
Cyprus	86	100	83	n/a	33	17	50	33	17	n/a	17
Czech Republic	28	55	67	n/a	n/a	n/a	22	22	11	22	22
Denmark	60	n/a	67	0	67	0	33	33	33	33	33
Estonia	100	100	67	33	0	0	0	0	33	33	0
Finland	80	76	79	32	21	47	42	5	32	37	11
France	72	63	78	41	1	6	32	22	20	29	17
Germany	92	81	80	38	4	38	52	17	17	62	13
Greece	78	76	76	19	14	19	24	24	62	19	29
Hungary	75	50	75	50	0	25	25	50	25	0	0
Ireland	92	82	88	41	38	31	56	69	22	41	28
Italy	79	74	79	44	3	21	47	53	47	18	12
Latvia	n/a	n/a	60	0	20	20	20	20	20	0	20
Lithuania	80	67	100	0	0	0	0	100	0	100	n/a
Luxembourg	71	83	73	50	23	23	32	14	36	23	27
Malta	40	100	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Netherlands	82	100	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Norway	56	55	86	57	0	57	14	71	29	29	0
Poland	100	79	88	11	5	42	46	45	51	25	4
Portugal	66	69	68	10	6	11	26	38	32	11	20
Romania	68	50	76	24	10	14	29	29	48	14	14
Serbia	n/a	100	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Slovakia	100	59	39	8	5	16	21	13	21	5	16
Slovenia	73	100	52	21	0	7	21	21	28	14	14
Spain	95	87	84	31	11	25	38	44	40	25	9
Sweden	72	70	78	33	37	26	37	33	15	33	19
Switzerland	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Turkey	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
United Kingdom	77	56	71	35	29	29	53	53	35	24	12
EUROPE	78	74	78	35	9	24	43	38	34	30	14

# ACE Resources

ACE Observatory  
<https://aceobservatory.com/>

All the data from the ACE Sector Studies presented as a Dashboard, ready to interrogate.



The Architectural Profession in Europe  
<https://www.ace-cae.eu/activities/publications/ace-2022-sector-study/>



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**Public Procurement within the  
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