Market overview · public edition

Services in EU institutional procurement

The big picture: market size, segments, buyers, suppliers, competition and the contracts coming up for renewal in 2027

November 2026

C4P market data: contract and award notices of EU institutions, bodies and agencies, build of 15 November 2026

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1. Key figures and executive summary

€90.96B
awarded in services by EU institutions, 2014–2026 (mostly framework ceilings)

15,914
award lots, about 1,200 a year

9,000+
suppliers have won at least one lot

€10.57B
awarded per year since 2022, twice the 2014–2021 level

41%
of value is digital services, mostly ICT

€6.26B
estimated value of 873 tenders reaching term in 2027

Summary

- **The market has doubled since 2022.** Awards rose from €4.93B a year in 2014–2021 to €10.57B a year in 2022–2026, while the number of lots stayed at about 1,200 a year. The growth comes from larger and longer framework contracts, whose values are ceilings rather than committed spend.
- **Digital is the largest family by value, policy and research by number of contracts.** ICT alone accounts for 40% of value. Corporate services (17%) and facilities, engineering and transport (15%) follow. Policy and research accounts for 27% of the lots but only 9% of the value: many smaller studies.
- **Growth is broad.** Every family has grown in value per year since 2022. Health (five times larger, with HaDEA), facilities, engineering and transport, communication and translation have grown fastest. Among the segments, management consulting, HR and training have grown least, and research, legal and tax have not grown.
- **A few large buyers.** 145 buyers awarded services lots, but the ten largest account for 55% of value. DG DIGIT alone accounts for 20%, followed by the European Parliament, EUSPA, the EIB, the ECB and DG COMM. By number of lots, the Translation Centre, the European Parliament and the JRC are the most active.
- **A fragmented supply side.** More than 9,000 suppliers have won at least one lot. The 10 largest by value hold 16% of the market. Large IT integrators lead by value and the Big Four firms by number of contracts; three Big Four firms are among the most active suppliers in more than half of the segments. Most segments have their own specialists.
- **€6.26B of renewals in 2027.** 873 services tenders reach the end of their term in 2027, about half of them frameworks or dynamic purchasing systems. The largest are DG DIGIT's telecommunications purchasing system (€540M), Frontex's travel agency services (€526M) and DG SCIC's conference services (€270M).

2. Scope and segment families

This overview covers services bought by EU institutions, bodies and agencies: the European Commission and its services, the European Parliament, the Council and the other institutions, the ECB and the EIB Group, executive and decentralised agencies and joint undertakings. External action procurement concerns work outside the EU and is excluded: EuropeAid (DG INTPA, DG DEVCO, EU delegations and external aid contracts), the Service for Foreign Policy Instruments (FPI) and the European External Action Service (EEAS).

C4P classifies each lot under one primary segment. This report covers the 25 services segments and leaves out the four supply segments (ICT equipment, telecoms equipment, measuring instruments, electrical and electronic equipment). To make the picture readable, the 25 segments are grouped into eight families:

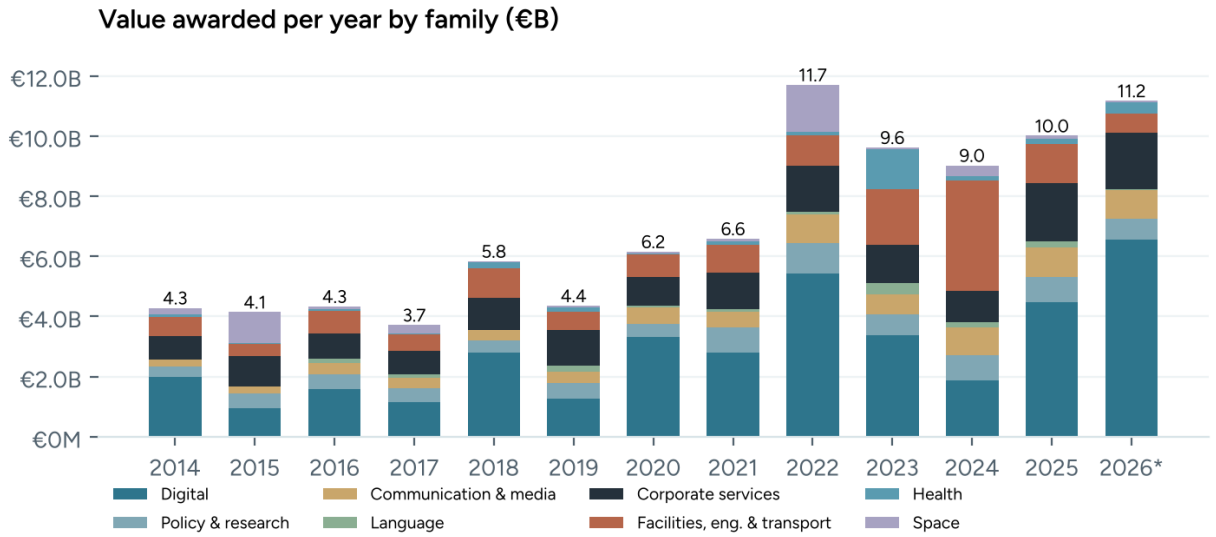
Family	Segments
Digital	ICT, Telecomms, Data
Policy and research	Policy, Research, Economics, Statistics, Survey
Communication and media	Comms, Media, Printing & Publishing
Language	Translation
Corporate services	Support, HR, Training, Legal, Finance, Tax, Management Consulting
Facilities, engineering and transport	Engineering, Repair, Transport
Health	Health
Space	Galileo, Copernicus

The segment names are C4P's. Galileo and Copernicus cover services for the EU space programmes; Engineering includes technical support to space, defence and research infrastructure.

- **Value.** Market values are awarded lot values; supplier values are each supplier's own share. Framework and dynamic purchasing system values are maximum ceilings for the whole term, often shared by several contractors in cascade: they are not committed spend.
- **Period.** Awards published from January 2014 to 15 November 2026. 2026 is a partial year (2026*). Values per year for 2022–2026* are divided by 4.9 years.
- **Deeper analysis.** Separate C4P reports cover the ICT services, Policy and Communication segments in detail (topics, top 10 supplier profiles and full renewal lists).

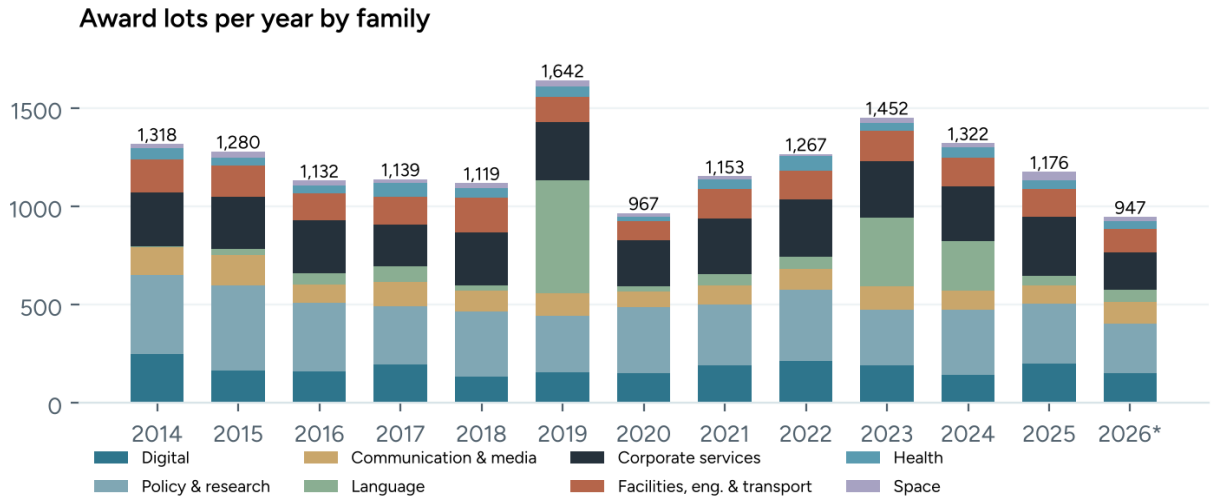
3. Market size and evolution

3.1 Value and number of contracts



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Values are mostly framework ceilings.

Services awards stayed at €3.7–5.8B a year until 2019, rose to €6.2–6.6B in 2020–2021 and to €9.0–11.7B a year since 2022. 2022 was the highest full year (€11.70B), and 2026 has already reached €11.17B. Digital services drive most of the peaks (2018, 2020, 2022, 2025 and 2026), but facilities, engineering and transport (2023–2024), space (2015 and 2022) and health (2023) have also added large contracts.



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026.

The number of award lots has stayed between about 950 and 1,650 a year, with no trend. The average awarded lot has grown from about €3–4M in 2014–2017 to €7–12M since 2022: the market has grown through larger, longer and more often multi-contractor frameworks, not through more contracts.

Year	Award lots	Value awarded	Avg per lot	Value tendered	Services share of EU awards
2014	1,318	€4.3B	€3.4M	€1.2B	97%
2015	1,280	€4.1B	€3.4M	€2.3B	90%
2016	1,132	€4.3B	€4.1M	€2.9B	84%
2017	1,139	€3.7B	€3.3M	€2.8B	74%
2018	1,119	€5.8B	€5.3M	€3.3B	76%
2019	1,642	€4.4B	€2.7M	€4.1B	91%
2020	967	€6.2B	€6.4M	€5.5B	93%
2021	1,153	€6.6B	€5.9M	€7.9B	72%
2022	1,267	€11.7B	€9.5M	€6.7B	98%
2023	1,452	€9.6B	€6.7M	€9.9B	94%
2024	1,322	€9.0B	€7.2M	€11.1B	96%
2025	1,176	€10.0B	€8.7M	€11.7B	93%
2026*	947	€11.2B	€11.9M	€14.9B	95%
2014–2026	**15,914**	**€91.0B**	**€5.9M**	**€84.2B**	**90%**

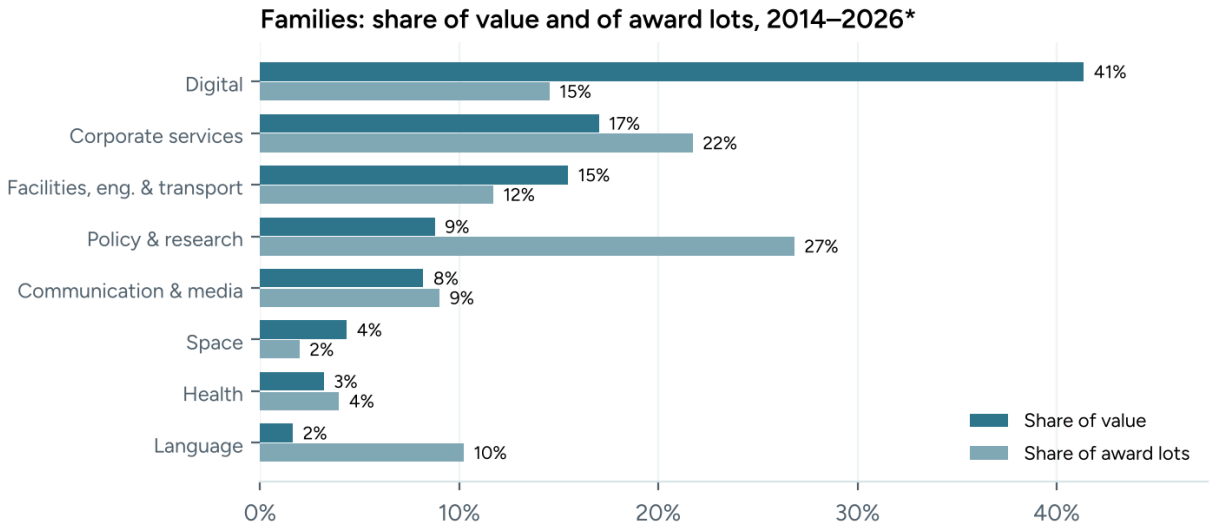
Avg per lot = average awarded value per lot. Value tendered = estimated value of contract notices published that year (pipeline). Services share = services value ÷ all value awarded by EU institutions (all segments, all buyers).

3.2 Pipeline

Tendered value has risen steadily, from €1–3B a year in 2014–2017 to about €10–15B a year since 2023, ahead of the awards that follow. This reflects the larger framework ceilings and the dynamic purchasing systems that DG DIGIT and other buyers now publish. 89% of services notice lots use the open procedure (section 7).

4. Families and segments

4.1 The eight families



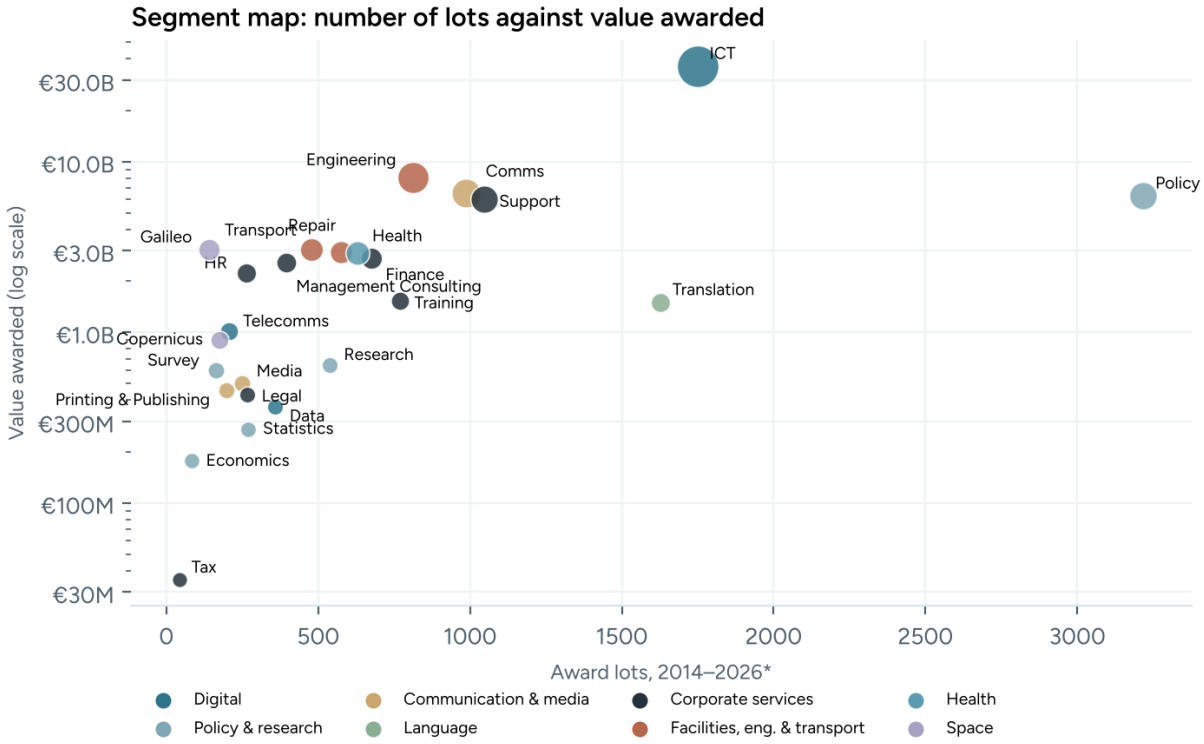
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026.

Family	Lots	% lots	Value	% value	Per year 2014–21	Per year 2022–26*	Growth
Digital	2,312	15%	€37.6B	41%	€1,989M	€4,455M	+124%
Corporate services	3,459	22%	€15.5B	17%	€976M	€1,572M	+61%
Facilities, engineering and transport	1,863	12%	€14.1B	15%	€699M	€1,737M	+149%
Policy and research	4,271	27%	€8.0B	9%	€488M	€838M	+72%
Communication and media	1,436	9%	€7.5B	8%	€378M	€909M	+140%
Space	316	2%	€4.0B	4%	€232M	€431M	+86%
Health	630	4%	€2.9B	3%	€90M	€447M	+394%
Language	1,627	10%	€1.5B	2%	€77M	€182M	+137%

Growth = value per year in 2022–2026* against 2014–2021.

Digital services account for 41% of value but only 15% of the lots: a few very large ICT frameworks. Policy and research is the opposite (27% of lots, 9% of value), and language services (translation and interpretation) account for one lot in ten but less than 2% of value: many small per-language contracts.

4.2 The segment map



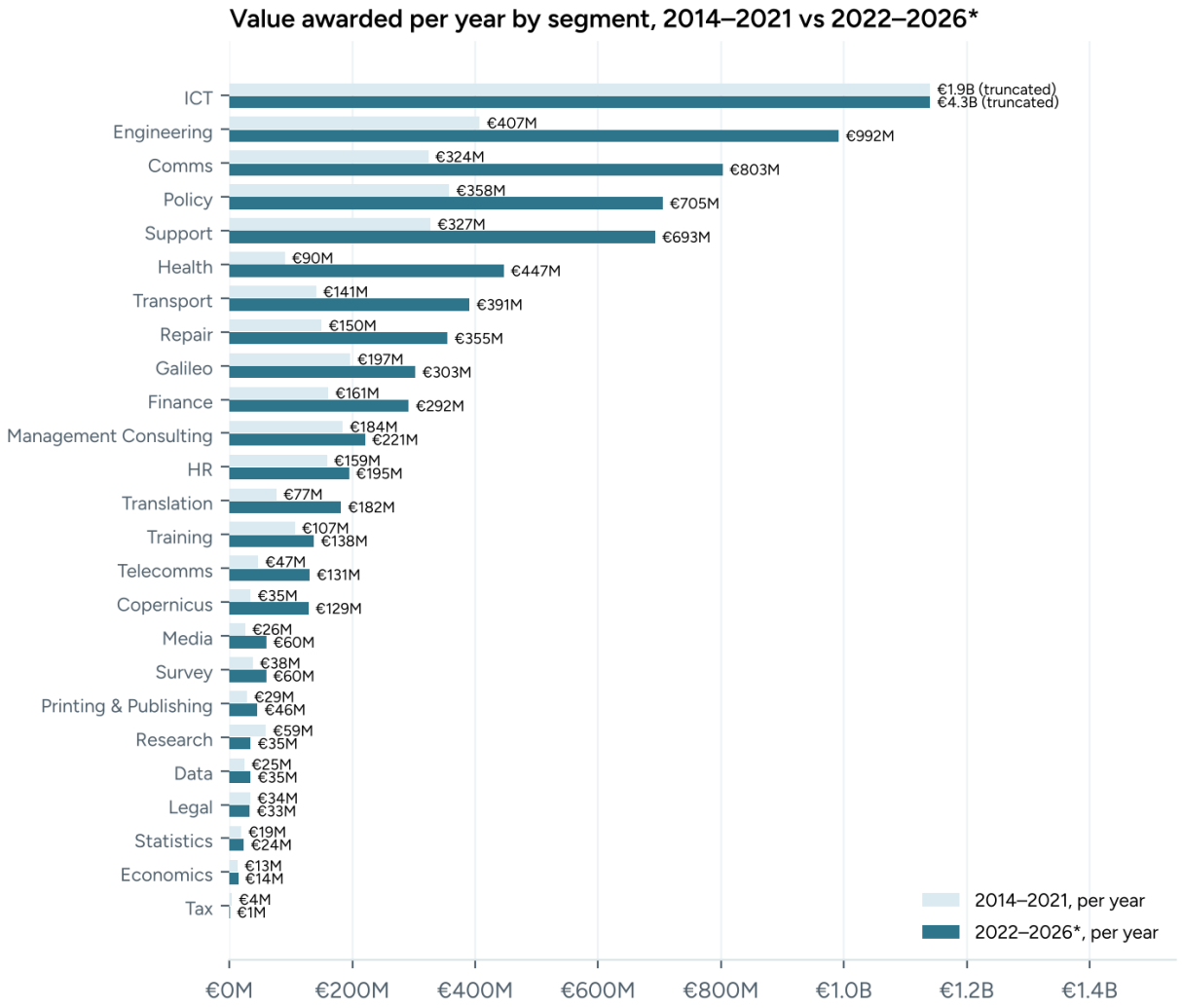
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Bubble size = value awarded per year in 2022–2026*. Value on a logarithmic scale.

The map shows three groups. ICT stands alone, with high value and many lots. Policy, translation and, to a lesser degree, support, communication and training are high-volume segments with many contracts of a few million or less. Galileo, engineering, HR, management consulting and transport have fewer but large contracts. The small specialist segments (statistics, data, economics, legal, tax) sit at the bottom left.

Segment	Family	Lots	Value	Avg per lot	Per year 2022–26*	Growth	Suppliers	Top-5 share
ICT	Digital	1,749	€36.2B	€21.1M	€4,289M	+124%	1,128	22%
Engineering	Facilities, eng., transport	812	€8.1B	€10.5M	€992M	+143%	786	23%
Comms	Comms and media	988	€6.5B	€6.6M	€803M	+148%	790	30%
Policy	Policy and research	3,217	€6.3B	€2.0M	€705M	+97%	2,902	14%
Support	Corporate services	1,048	€6.0B	€5.9M	€693M	+112%	645	43%
Galileo	Space	140	€3.1B	€21.8M	€303M	+54%	82	81%
Transport	Facilities, eng., transport	477	€3.0B	€6.5M	€391M	+177%	288	37%
Repair	Facilities, eng., transport	574	€2.9B	€5.2M	€355M	+136%	352	56%
Health	Health	630	€2.9B	€4.7M	€447M	+394%	625	19%
Finance	Corporate services	674	€2.7B	€4.5M	€292M	+81%	464	44%
Management Consulting	Corporate services	395	€2.6B	€6.6M	€221M	+20%	546	32%
HR	Corporate services	264	€2.2B	€8.8M	€195M	+23%	230	42%
Training	Corporate services	769	€1.5B	€2.0M	€138M	+29%	692	22%
Translation	Language	1,627	€1.5B	€1.0M	€182M	+137%	625	33%
Telecomms	Digital	205	€1.0B	€5.0M	€131M	+178%	85	66%
Copernicus	Space	176	€905M	€5.2M	€129M	+272%	189	67%
Research	Policy and research	537	€645M	€1.2M	€35M	-42%	737	20%
Survey	Policy and research	164	€597M	€3.7M	€60M	+57%	122	82%
Media	Comms and media	249	€500M	€2.1M	€60M	+132%	122	64%
Printing & Publishing	Comms and media	199	€455M	€2.4M	€46M	+58%	196	38%
Legal	Corporate services	266	€434M	€1.7M	€33M	-3%	288	20%
Data	Digital	358	€366M	€1.0M	€35M	+40%	226	37%
Statistics	Policy and research	270	€271M	€1.0M	€24M	+22%	116	57%
Economics	Policy and research	83	€176M	€2.1M	€14M	+7%	178	28%
Tax	Corporate services	43	€35M	€0.8M	€1M	-81%	31	63%

Sorted by value. Growth = value per year 2022–2026* against 2014–2021. Suppliers = suppliers that have won at least one lot in the segment. Top-5 share = share of the segment's value won by its 5 largest suppliers.

4.3 Growth by segment



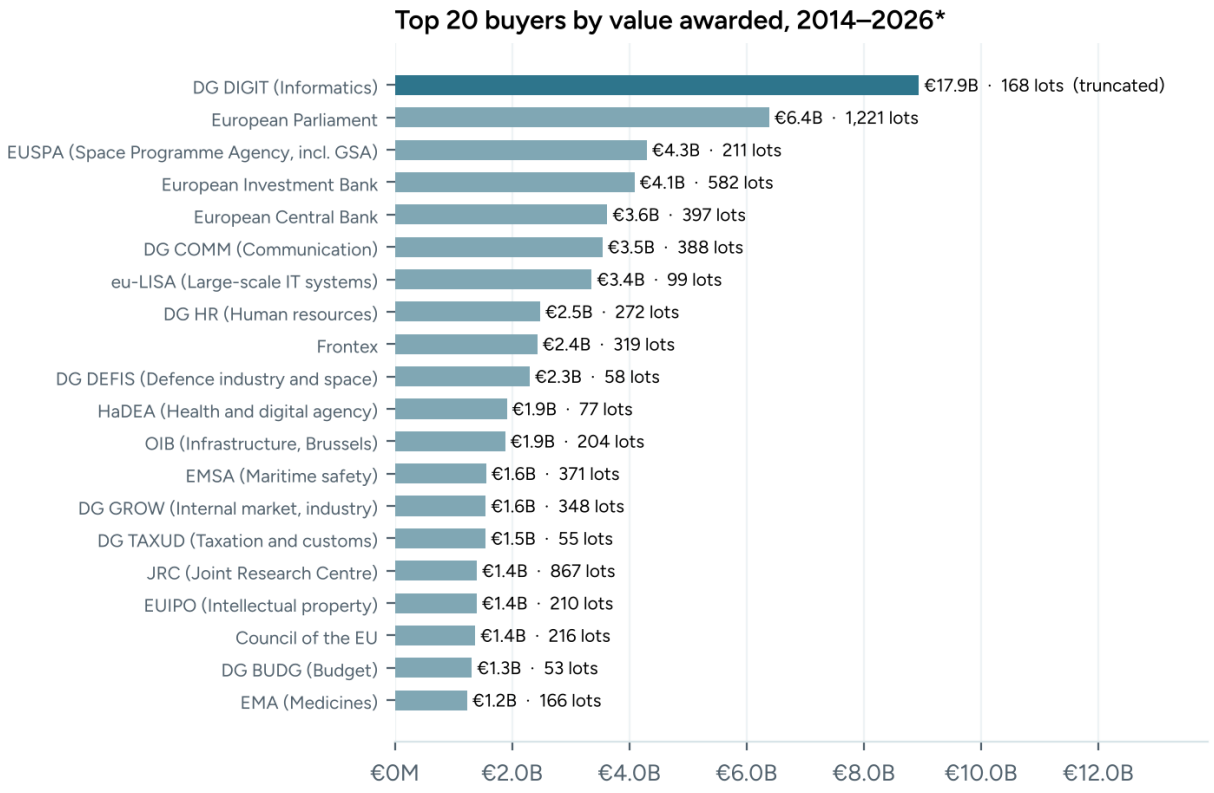
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Per year: 8 years for 2014–2021, 4.9 years for 2022–15 Nov 2026.

Value per year has more than doubled since 2022 in ICT, engineering, communication, transport, repair, health, translation, telecoms, media and Copernicus. Health has grown fivefold (€90M to €447M a year), led by HaDEA. Policy, support and finance have nearly doubled. Management consulting, HR, training, statistics and economics have grown by less than a third; legal services are flat, and research and tax award less than before.

5. Buyers

145 buyers (with renamed bodies combined) awarded at least one services lot. The ten largest by value account for 55% of the market, and DG DIGIT alone for 20%. External action buyers (EuropeAid, FPI, EEAS) are excluded throughout.

5.1 Top buyers



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. DG DIGIT's bar is truncated.

Buyer	Lots	Value	% of value	Rank by lots	Per year 2014–21	Per year 2022–26*
DG DIGIT (Informatics)	168	€17.9B	19.7%	#32	€747M	€2,454M
European Parliament	1,221	€6.4B	7.0%	#2	€395M	€662M
EUSPA (Space Programme Agency, incl. GSA)	211	€4.3B	4.7%	#22	€227M	€509M
European Investment Bank	582	€4.1B	4.5%	#4	€179M	€545M
European Central Bank	397	€3.6B	4.0%	#6	€178M	€452M
DG COMM (Communication)	388	€3.5B	3.9%	#7	€200M	€398M
eu-LISA (Large-scale IT systems)	99	€3.4B	3.7%	#45	€293M	€208M
DG HR (Human resources)	272	€2.5B	2.7%	#16	€146M	€268M
Frontex	319	€2.4B	2.7%	#12	€72M	€381M
DG DEFIS (Defence industry and space)	58	€2.3B	2.5%	#65	€9M	€457M
HaDEA (Health and digital agency)	77	€1.9B	2.1%	#52	€1M	€391M
OIB (Infrastructure, Brussels)	204	€1.9B	2.1%	#24	€91M	€236M
EMSA (Maritime safety)	371	€1.6B	1.7%	#9	€137M	€94M
DG GROW (Internal market, industry)	348	€1.6B	1.7%	#10	€180M	€22M
DG TAXUD (Taxation and customs)	55	€1.5B	1.7%	#66	€152M	€69M
JRC (Joint Research Centre)	867	€1.4B	1.5%	#3	€102M	€120M
EUIPO (Intellectual property)	210	€1.4B	1.5%	#23	€108M	€109M
Council of the EU	216	€1.4B	1.5%	#21	€109M	€103M
DG BUDG (Budget)	53	€1.3B	1.4%	#68	€35M	€212M
EMA (Medicines)	166	€1.2B	1.4%	#33	€64M	€148M

Top 20 by value, 2014–2026*. Renamed bodies are combined with their predecessors (for example EUSPA with GSA, EISMEA with EASME).

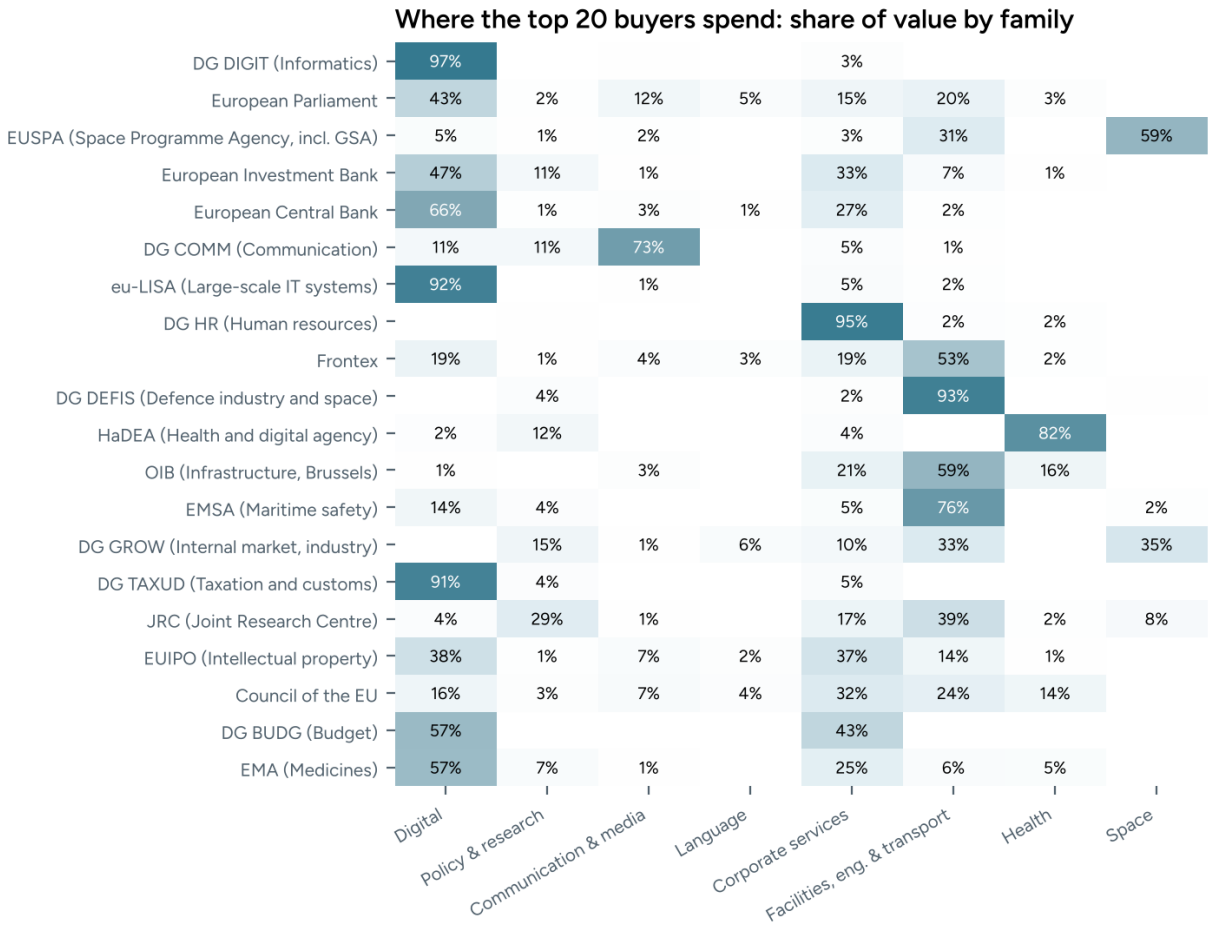
DG DIGIT buys the Commission's IT; the European Parliament buys across all families (communication, facilities, IT, catering and security). EUSPA, DG DEFIS and DG GROW buy the services of the space programmes; the EIB and the ECB buy IT, consultancy and facility services; DG COMM and DG HR buy communication and corporate services for the whole Commission. Since 2022 the fastest-growing large buyers are DG DIGIT (€747M to €2.45B a year), HaDEA (from almost nothing to €391M a year), DG DEFIS (€9M to €457M), Frontex (€72M to €381M), the EIB, the ECB and EUSPA. DG GROW, DG TAXUD and eu-LISA award less than before.

Most active buyers by lots	Lots	Value	Rank by value
Translation Centre (CdT)	1,360	€514M	#40
European Parliament	1,221	€6.4B	#2
JRC (Joint Research Centre)	867	€1.4B	#16
European Investment Bank	582	€4.1B	#4
EFSA (Food safety)	401	€1.1B	#22
European Central Bank	397	€3.6B	#5
DG COMM (Communication)	388	€3.5B	#6
Eurostat	381	€480M	#42
EMSA (Maritime safety)	371	€1.6B	#13
DG GROW (Internal market, industry)	348	€1.6B	#14

Top 10 by number of award lots, 2014–2026*.

Counted in lots, the Translation Centre (1,360 lots, mostly per-language translation lots), the European Parliament and the JRC are the most active buyers. EFSA, Eurostat and DG ENV award many small studies and data contracts.

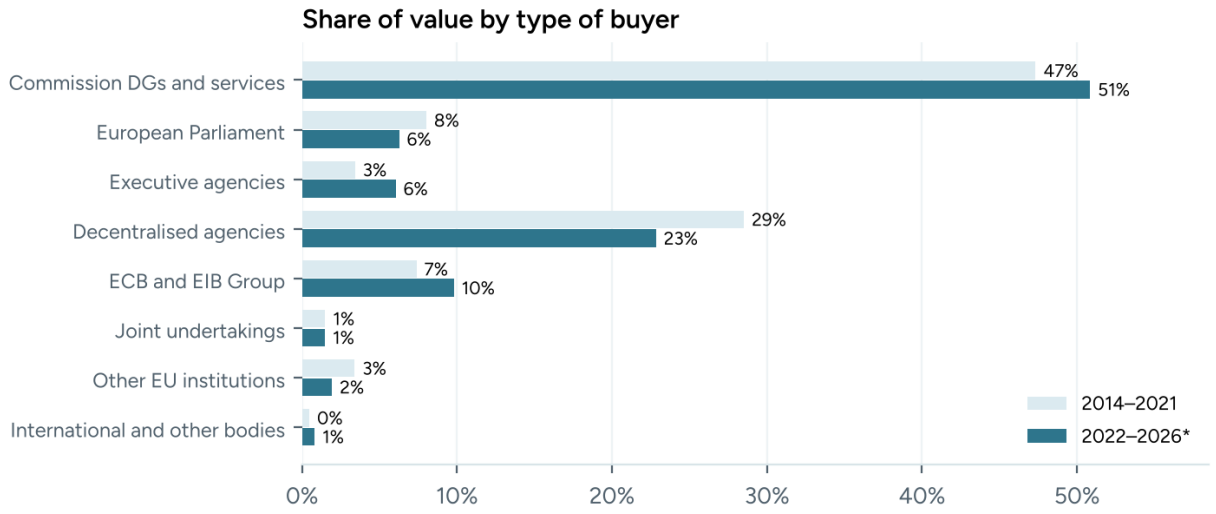
5.2 Where the largest buyers spend



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Share of each buyer's services value by family. Blank = less than 0.5%.

Most large buyers concentrate on one or two families: DG DIGIT, eu-LISA and DG TAXUD on digital services, DG HR on corporate services, DG DEFIS, EMSA and the OIB on facilities and engineering, HaDEA on health, DG COMM on communication. The European Parliament, the Council, the JRC, the EIB, the ECB and EUIPO spread their spending across four or more families.

5.3 Types of buyer



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026.

Type of buyer	Buyers	Lots	Value	% of value
Commission DGs and services	42	5,591	€44.9B	49%
European Parliament	1	1,221	€6.4B	7%
Executive agencies	7	635	€4.5B	5%
Decentralised agencies	42	6,255	€23.0B	25%
ECB and EIB Group	3	1,027	€8.0B	9%
Joint undertakings	13	402	€1.3B	1%
Other EU institutions	7	465	€2.3B	3%
International and other bodies	30	322	€601M	1%

Buyer types are assigned for this report from each buyer's legal status.

The Commission's directorates-general and services account for half of the value, and decentralised agencies for a quarter. Since 2022 the agencies' share has fallen (29% to 23%) while the executive agencies (mainly HaDEA) and the ECB and EIB Group have grown.

6. Suppliers

6.1 The supply side

More than 9,000 suppliers have won at least one services lot since 2014, and 1,200 to 1,800 win each year. The market is not concentrated: the 5 largest suppliers by value hold 10%, the 10 largest 16% and the 20 largest 26% of all value awarded. Concentration is much higher within segments (section 6.4).

6.2 The largest suppliers



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Value = each supplier's own share of the lots it won. Ranks by lots are among all suppliers.

Supplier	Type	Value (own share)	Lots	Rank by lots
Company 1	IT services	€1.8B	234	#9
Company 2	IT services	€1.8B	133	#19
Company 3	IT services	€1.8B	247	#7
Company 4	Big Four firm	€1.7B	461	#2
Company 5	IT services	€1.5B	145	#16
Company 6	IT services	€1.3B	161	#14
Company 7	IT services	€1.3B	94	#32
Company 8	Space and defence	€1.2B	63	#59
Company 9	Security services	€1.2B	74	#45
Company 10	Consultancy	€1.1B	254	#6
Company 11	Facility services	€1.0B	29	#162
Company 12	Big Four firm	€1.0B	475	#1
Company 13	IT services	€896M	87	#34
Company 14	IT services	€895M	69	#52
Company 15	Space and defence	€879M	8	#632
Company 16	Software and cloud	€803M	9	#579
Company 17	Big Four firm	€769M	326	#3
Company 18	IT services	€763M	179	#11
Company 19	IT services	€736M	86	#35
Company 20	Staffing agency	€736M	47	#85
Company 21	IT services	€734M	67	#55
Company 22	Engineering consultancy	€722M	15	#345
Company 23	IT services	€718M	91	#33
Company 24	Space agency	€711M	2	#1333
Company 25	IT services	€649M	35	#131

Top 25 by value, 2014–2026*. Suppliers are numbered by value won, Company 1 being the largest; types are assigned for this report.

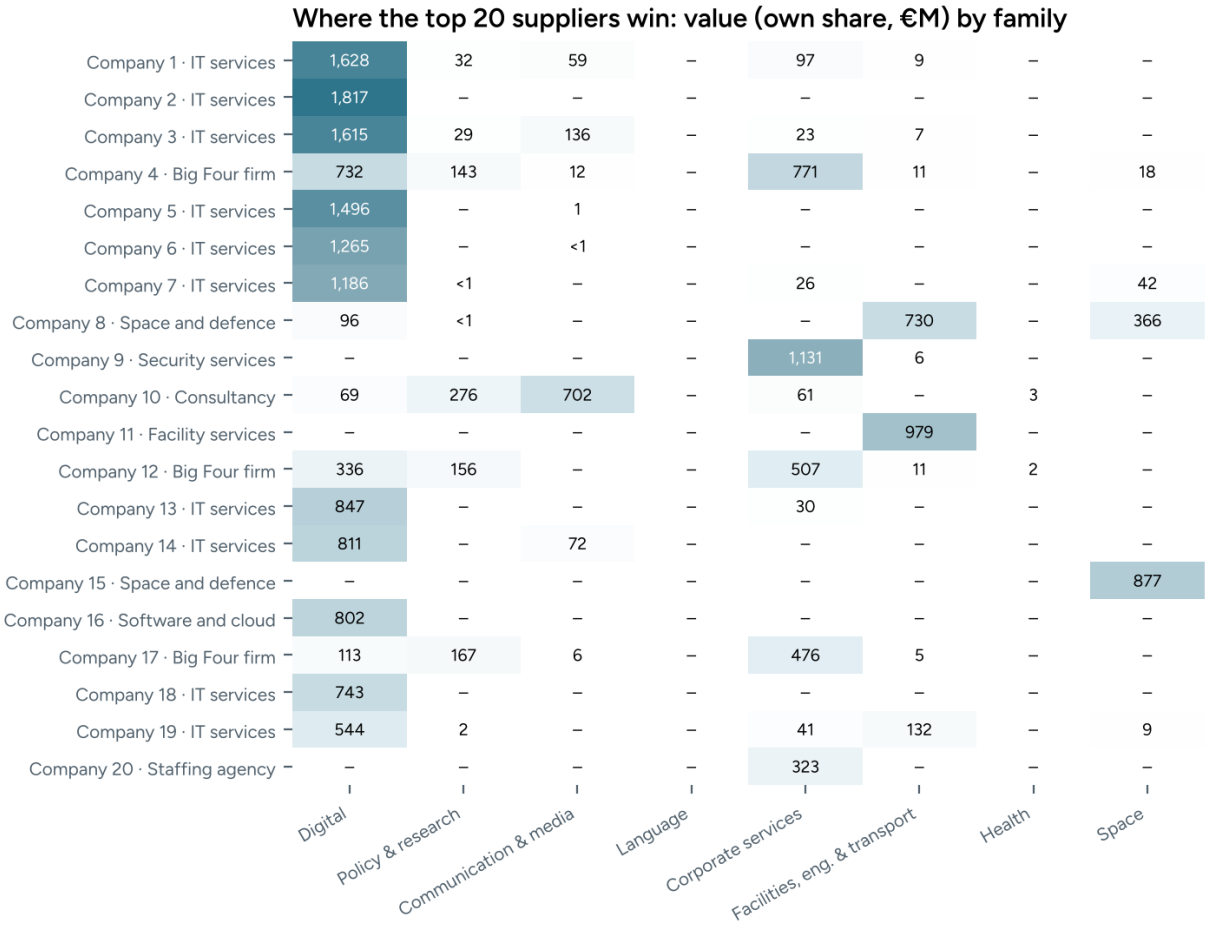
Large IT integrators hold six of the seven first places by value, together with one of the Big Four firms. They are followed by specialists that win very large contracts in a single family: space and defence groups in space and engineering, a security company, a facility services group, a staffing agency, and a consultancy working in communication and policy.

Most active suppliers by lots	Type	Lots	Value
Company 12	Big Four firm	475	€1.0B
Company 4	Big Four firm	461	€1.7B
Company 17	Big Four firm	326	€769M
Company 44	Consultancy	307	€381M
Company 172	Language services	296	€75M
Company 10	Consultancy	254	€1.1B
Company 3	IT services	247	€1.8B
Company 116	Language services	244	€130M
Company 1	IT services	234	€1.8B
Company 164	Language services	226	€80M
Company 18	IT services	179	€763M
Company 122	Consultancy	172	€123M
Company 30	IT services	164	€499M
Company 6	IT services	161	€1.3B
Company 36	Big Four firm	153	€442M

Top 15 by number of award lots won, 2014–2026*.

Counted in lots, three Big Four firms lead (475, 461 and 326 lots), followed by policy consultancies, language service providers and the large IT integrators.

6.3 Who works across segments



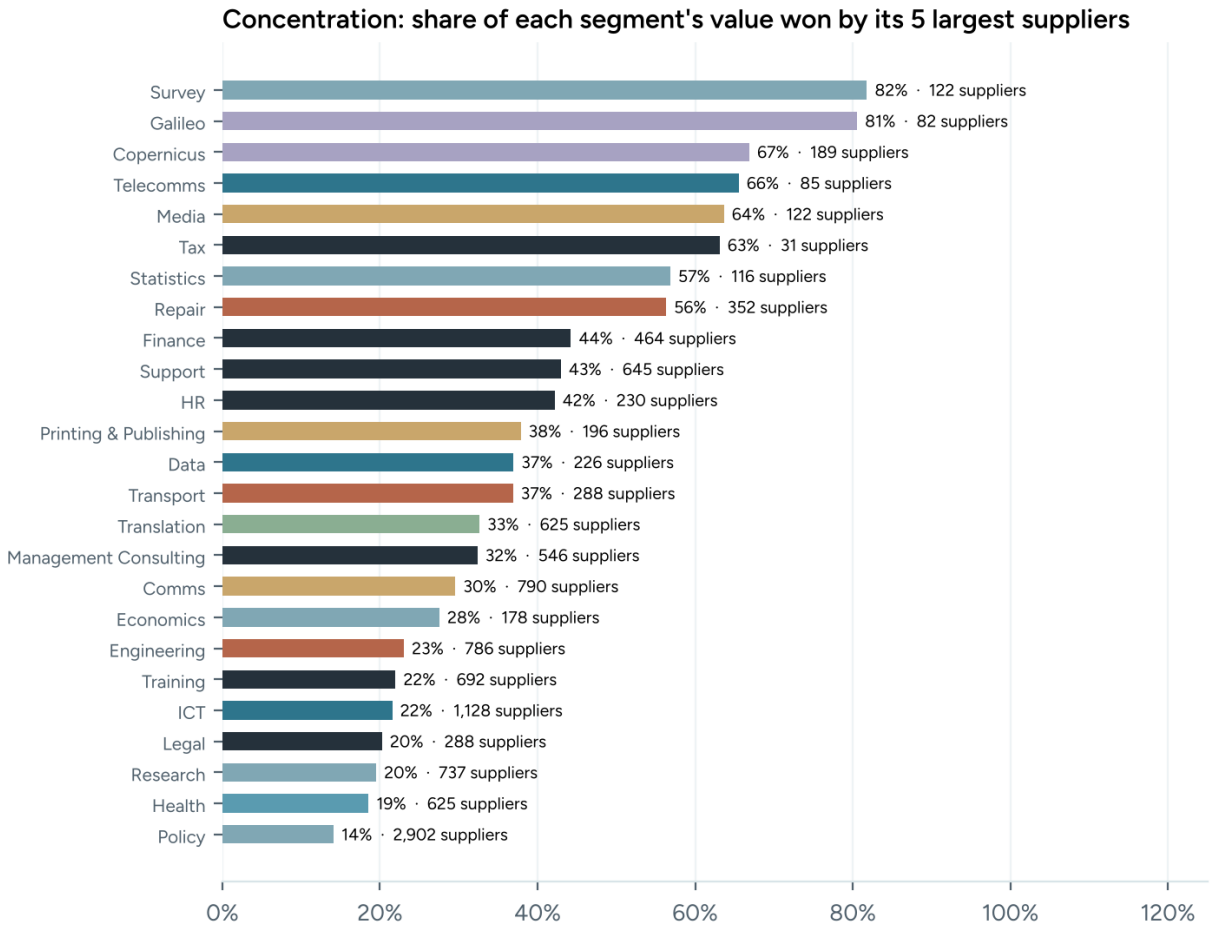
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Own-share value by family, counted where the supplier is among the 100 largest suppliers of a segment by lots.

Supplier	Type	Segments where it is among the top 100	Families
Company 4	Big Four firm	14	6 of 8
Company 12	Big Four firm	14	5 of 8
Company 17	Big Four firm	14	5 of 8
Company 10	Consultancy	12	5 of 8
Company 439	University	9	4 of 8
Company 44	Consultancy	8	3 of 8
Company 3	IT services	7	5 of 8
Company 26	IT services	7	4 of 8
Company 156	Consultancy	7	3 of 8
Company 77	Market research	7	3 of 8

Ranked by the number of segments in which the supplier is among the 100 most active suppliers.

Three Big Four firms are the true generalists: each is among the 100 most active suppliers in 14 of the 25 segments, from policy and finance to ICT, training and management consulting. Policy and communication consultancies, a university, IT services firms and a market research company also work across many segments. The large IT integrators and the security, facility and space companies specialise in one family.

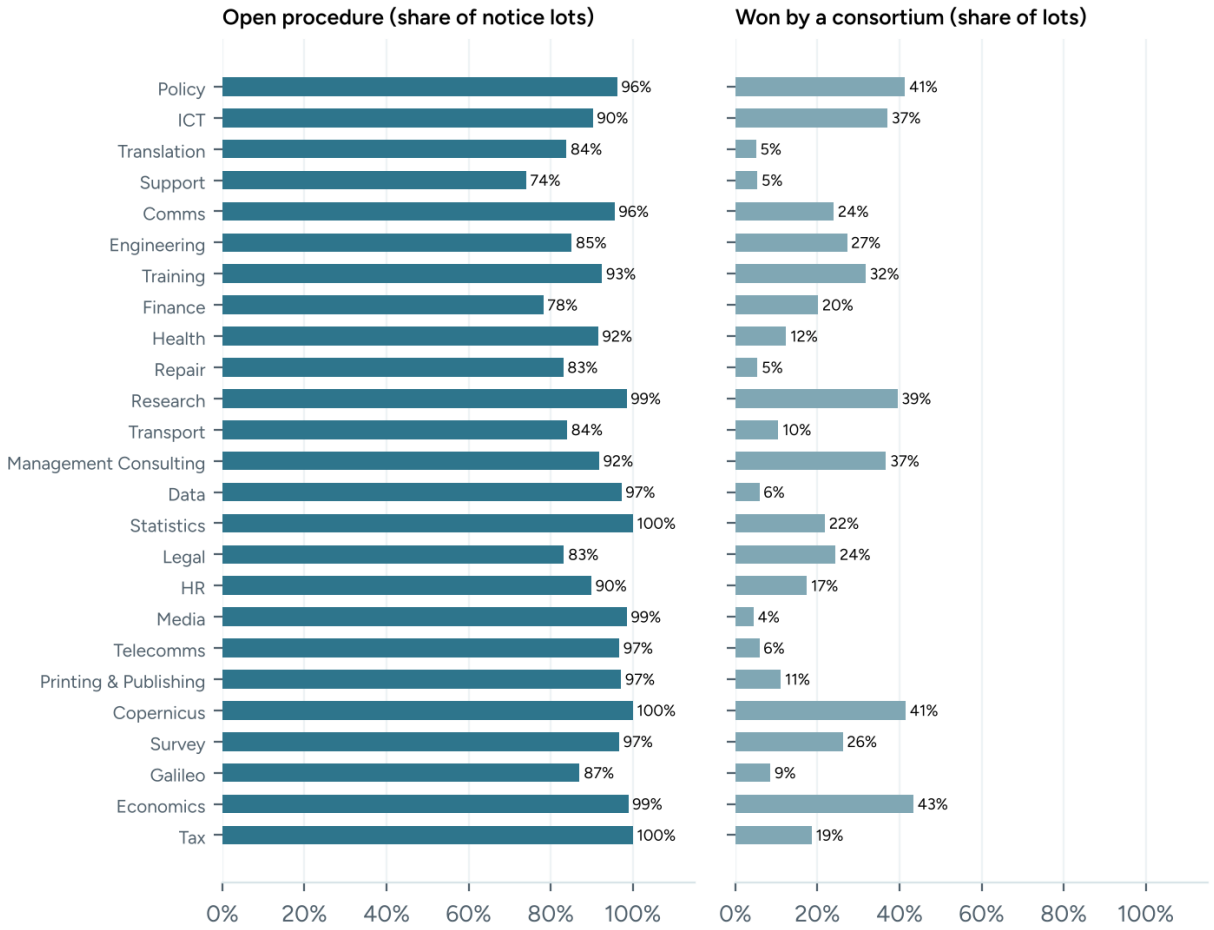
6.4 Concentration by segment



Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Share of each segment's value won by its 5 largest suppliers (own share), and the number of suppliers with at least one lot.

Concentration varies widely. Survey and Galileo are the most concentrated: the five largest suppliers win over 80% of the value. In Copernicus, telecoms, media and tax they win close to two thirds. Policy, health, legal, research, ICT and training are fragmented: the five largest win about a fifth or less, and no single supplier wins more than 10% of the segment.

7. Competition



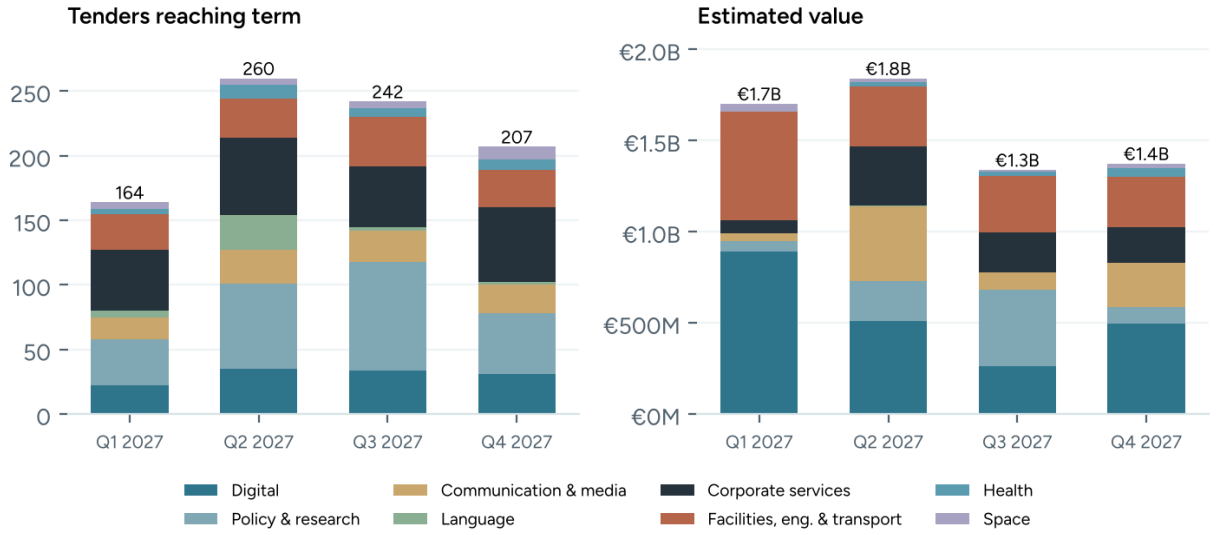
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026. Left: share of notice lots published under the open procedure. Right: share of award lots won by a consortium (a team with a leader).

The open procedure dominates: 89% of services notice lots. Restricted and negotiated procedures are more common in support services (security, catering, cleaning: 74% open) and finance (78%), and to a lesser degree in legal, repair, translation, transport and engineering (83–85%).

Consortia are common in knowledge services: about 40% of policy, research, economics and Copernicus lots, and over a third of ICT and management consulting lots, are won by a team. They are rare (5% or less) in translation, support, repair and media, where single providers deliver.

8. Contracts reaching the end of their term in 2027

C4P estimates when each contract ends from its notice publication date and maximum duration. On that basis, 873 services tenders (1,848 lots) reach the end of their term in 2027, with an estimated value of €6.26B. 432 of them are frameworks or dynamic purchasing systems, whose values are ceilings; Extensions and renewals are not known in advance and may move the dates.



Source: C4P market data, build of 15 Nov 2026. Expected end of term = notice publication date + contract duration. Each tender is counted under its primary segment.

Family	Tenders	Lots	Estimated value
Digital	122	204	€2.2B
Corporate services	212	317	€815M
Facilities, engineering and transport	125	170	€1.5B
Policy and research	233	311	€791M
Communication and media	89	133	€785M
Space	25	28	€102M
Health	30	52	€97M
Language	37	633	€5M
Total	**873**	**1,848**	**€6.3B**

Language: 633 lots in 37 tenders, mostly per-language lots of the Translation Centre.

Digital and facilities, engineering and transport account for more than half of the value. Q1 and Q2 2027 are the busiest quarters by value, Q2 and Q3 by number of tenders.

8.1 The 25 largest tenders

Expected	Buyer	Tender [notice]	Segment	Est. value	Current contractors (no.)
2027-02	DG DIGIT	Telecommunication Services Dynamic Purchasing System [112970-2023]	Telecomms	€540.0M*	3
2027-01	Frontex	Provision of Travel Agency Services to FRONTEX [003199-2023]	Transport	€526.0M*	–
2027-06	DG SCIC	Provision of Conference Services [360002-2023]	Comms	€270.0M*	4+
2027-06	European Defence Agency	Provision of C, Ku, (civ)Ka, L and UHF Bands Satellite Commu [326179-2023]	Telecomms	€250.0M	1
2027-12	European Central Bank	SupTech Digital Transformation Delivery and the Exploration, [639220-2020]	ICT	€227.5M*	4+
2027-11	Frontex	FRONTEX Surveillance Aircraft Services for Land and Maritime [667293-2023]	Engineering	€168.6M*	3
2027-10	DG RTD	Event Management and Related Communication Services [653336-2023]	Comms	€168.0M*	3
2027-02	DG CONNECT	Simpl - Smart Middleware Platform for Cloud-to-edge Federati [116659-2023]	ICT	€150.0M*	3
2027-05	EMA	Agile Capability Delivery Contract [282255-2023]	ICT	€150.0M	3
2027-04	European Defence Agency	In-theatre Aeromedical Evacuation Services - AIRMEDEVAC [200014-2023]	Engineering	€140.0M*	4+
2027-02	European Parliament	Outsourcing of Communication Services [069821-2023]	ICT	€138.0M	4+
2027-06	PMO	Accident risk insurance [294704-2022]	Finance	€136.5M*	–
2027-10	Europol	ICT Consultancy [616600-2023]	ICT	€112.6M*	3
2027-09	HaDEA	HADEA/2023/OP/0036 - Speed up the Development of and Access [572368-2023]	Policy	€82.0M	1
2027-05	European Investment Bank	Provision of Facilities Maintenance Services: Multi-technica [238473-2022]	Repair	€79.5M	1
2027-09	Frontex	Provision of services for development and consultancy on inf [022417-2024]	ICT	€75.0M*	–
2027-08	DG DEFIS	G2 System Support Phase CDE System AIV [425455-2022]	Engineering	€66.6M	1
2027-12	European Investment Bank	Recruitment and Administration of Temporary Staff for the EI [734870-2022]	HR	€62.2M*	3
2027-08	DG DEFIS	G2 System Support Phase CDE Security and PRS Engineering [425456-2022]	Engineering	€60.6M	1
2027-09	DG HOME	EU Knowledge Hub on Prevention of Radicalisation [540470-2023]	Policy	€60.0M*	3
2027-12	Publications Office	Provision of project management and other related services f [783576-2023]	ICT	€58.0M	–
2027-04	DG RTD	Framework Contracts for the Impact Assessments, Evaluations, [232459-2023]	Policy	€52.0M*	4+
2027-08	DG DEFIS	G2 System Support Phase CDE System Engineering Technical Ass [425452-2022]	Engineering	€51.9M	2
2027-07	DG COMM	Dynamic Purchasing System (DPS) for Services Related to Citi [438876-2023]	Management Consulting	€50.0M*	3
2027-10	Court of Justice of the EU	Operations and User Support (ATLAS) [606202-2023]	ICT	€49.3M*	1

Grouped by contract notice. Expected = earliest expected end of term among its lots (YYYY-MM). * = framework or DPS ceiling. Where available for ICT, Policy and Communication, the value from a separately compiled list of 2027 renewals is used.

8.2 Buyers

Buyer	Tenders	Estimated value
Frontex	19	€937M
DG DIGIT (Informatics)	2	€540M
European Defence Agency	15	€444M
European Investment Bank	51	€405M
European Central Bank	19	€272M
DG SCIC (Interpretation)	1	€270M
DG RTD (Research)	6	€247M
DG DEFIS (Defence industry and space)	13	€235M
DG CONNECT (incl. DG CNECT)	15	€225M
European Parliament	56	€218M

Top 10 buyers by estimated value of tenders reaching term in 2027.

Frontex has the most value at stake (19 tenders, €937M, led by travel agency and aerial surveillance services), followed by DG DIGIT (telecommunications purchasing system), the European Defence Agency and the EIB. By number of tenders, the European Parliament (56), the EIB (51) and the JRC (50) are the most active.

9. Segment profiles

One page per segment, grouped by family. Each profile shows the size and trend of the segment, its main topics, buyers and suppliers, how it is bought and what reaches the end of its term in 2027. Topics are C4P's classification within each segment. Values are awarded values (suppliers: own share); 2026* is a partial year shown in a lighter shade.

9.1 ICT

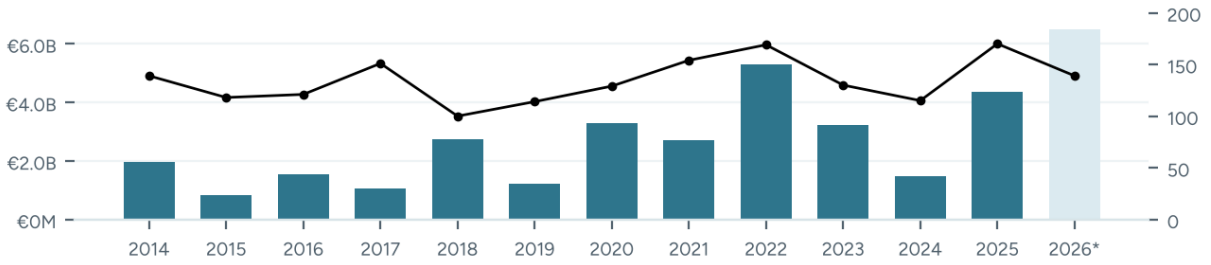
Digital

€36.2B
awarded, 1,749 lots, 2014–2026*

€4,289M
per year since 2022 (+124% on 2014–2021)

1,128
suppliers; top 5 win 22%

Value awarded per year (bars, left) and award lots (line, right)



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
SW Development	509	€14.1B	39%	€755M	€1,650M
IT Consulting	394	€9.3B	26%	€331M	€1,365M
IT Support	376	€8.3B	23%	€631M	€676M
Cloud	33	€1.7B	5%	€23M	€302M
Network	64	€1.2B	3%	€102M	€74M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG DIGIT	137	€16.9B	Company 2 (IT services)	128	€1.8B
eu-LISA	34	€3.1B	Company 1 (IT services)	171	€1.6B
European Parliament	96	€2.7B	Company 3 (IT services)	181	€1.6B
European Central Bank	48	€2.3B	Company 5 (IT services)	138	€1.5B
European Investment Bank	73	€1.9B	Company 6 (IT services)	156	€1.3B

By value, 2014–2026*. 115 buyers and 1,128 suppliers in total.

How it is bought. 90% of notice lots under the open procedure; 37% of award lots won by a consortium; average awarded lot €21.1M.

2027 renewals. 104 tenders (178 lots) reach the end of their term in 2027, estimated value €1.3B. Largest: European Central Bank, SupTech Digital Transformation Delivery and the Explo… (€227.5M, 2027-12); DG CONNECT, Simpl - Smart Middleware Platform for Cloud-to-edge F… (€150.0M, 2027-02); EMA, Agile Capability Delivery Contract (€150.0M, 2027-05).

Excludes the SIDE III software purchasing system (2023), a software supply contract.

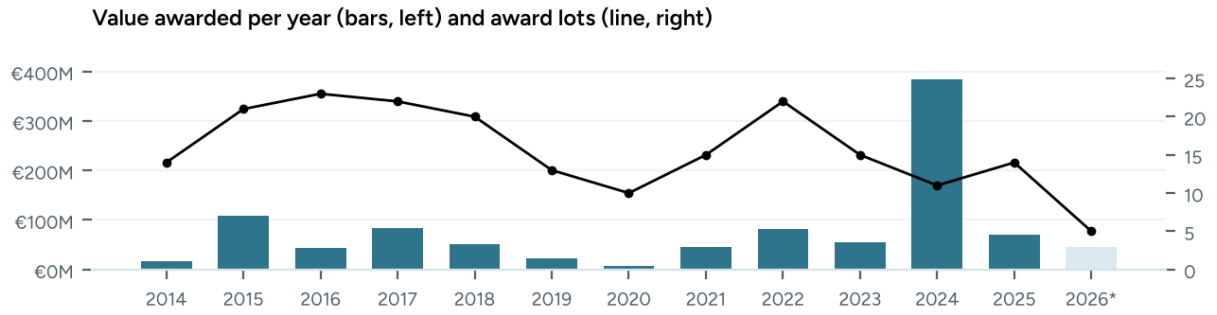
9.2 Telecomms

Digital

€1.0B
awarded, 205 lots, 2014–2026*

€131M
per year since 2022 (+178% on 2014–2021)

85
suppliers; top 5 win 66%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Telecomms	205	€1.0B	100%	€47M	€131M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG DIGIT	21	€443M	Company 56 (Space and defence)	4	€254M
European Defence Agency	3	€251M	Company 84 (Telecoms operator)	10	€147M
European Central Bank	7	€60M	Company 39 (Telecoms operator)	12	€113M
European Investment Bank	3	€36M	Company 51 (Telecoms operator)	11	€75M
EUIPO	12	€29M	Company 110 (Telecoms operator)	16	€74M

By value, 2014–2026*. 50 buyers and 85 suppliers in total.

How it is bought. 97% of notice lots under the open procedure; 6% of award lots won by a consortium; average awarded lot €5.0M.

2027 renewals. 10 tenders (12 lots) reach the end of their term in 2027, estimated value €797M. Largest: DG DIGIT, Telecommunication Services Dynamic Purchasing System (€540.0M, 2027-02); European Defence Agency, Provision of C, Ku, (civ)Ka, L and UHF Bands Satellit… (€250.0M, 2027-06); EUIPO, Telecommunications services - Data and fixed telephon… (€5.0M, 2027-03).

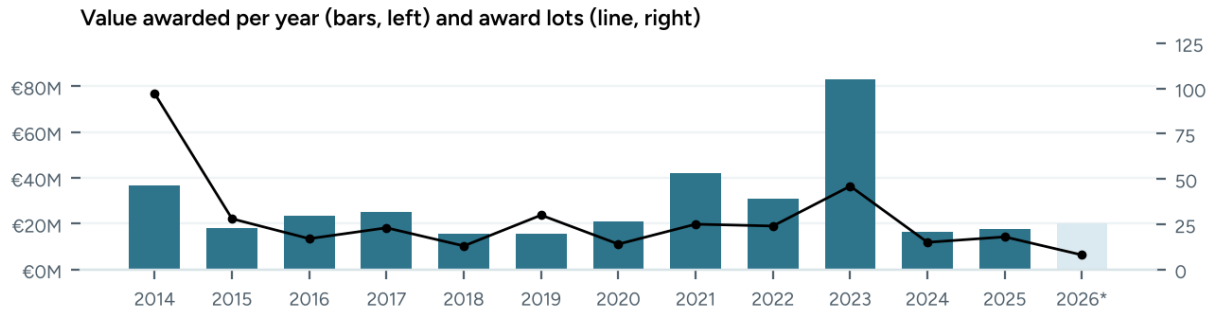
9.3 Data

Digital

€366M
awarded, 358 lots, 2014–2026*

€35M
per year since 2022 (+40% on 2014–2021)

226
suppliers; top 5 win 37%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Supply	204	€289M	79%	€18M	€30M
Collection	154	€77M	21%	€7M	€5M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG BUDG	7	€43M	Company 186 (Data provider)	20	€66M
FRA	76	€43M	Company 212 (Data provider)	5	€19M
JRC	25	€41M	Company 415 (Data provider)	6	€18M
OLAF	17	€40M	Company 416 (Data provider)	14	€16M
Eurostat	22	€33M	Company 403 (Data provider)	5	€16M

By value, 2014–2026*. 42 buyers and 226 suppliers in total.

How it is bought. 97% of notice lots under the open procedure; 6% of award lots won by a consortium; average awarded lot €1.0M.

2027 renewals. 8 tenders (14 lots) reach the end of their term in 2027, estimated value €19M. Largest: EMSA, The Procurement of SAT-AIS Data Services (€8.4M, 2027-05); JRC, Framework Service Contract for the Collection of Mete… (€7.9M, 2027-02); EMSA, Provision and Access to Maritime Data and Information… (€1.2M, 2027-07).

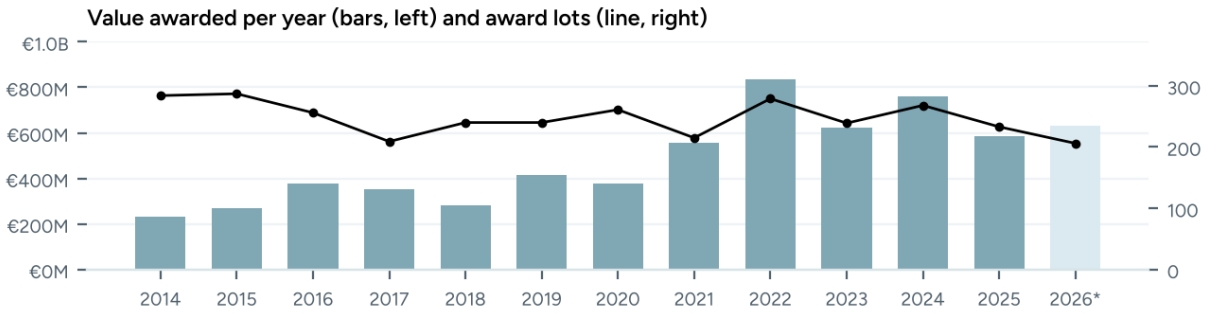
9.4 Policy

Policy and research

€6.3B
awarded, 3,217 lots, 2014–2026*

€705M
per year since 2022 (+97% on 2014–2021)

2,902
suppliers; top 5 win 14%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Environment	981	€1.7B	27%	€104M	€172M
Evaluation	125	€894M	14%	€32M	€131M
Impact assessment	161	€349M	6%	€30M	€22M
Health	166	€321M	5%	€9M	€51M
Policy	280	€280M	4%	€15M	€33M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
European Investment Bank	136	€442M	Company 10 (Consultancy)	141	€265M
DG ENV	309	€432M	Company 44 (Consultancy)	226	€189M
EISMEA	177	€358M	Company 17 (Big Four firm)	99	€161M
JRC	169	€340M	Company 12 (Big Four firm)	100	€141M
DG RTD	51	€293M	Company 4 (Big Four firm)	91	€133M

By value, 2014–2026*. 124 buyers and 2,902 suppliers in total.

How it is bought. 96% of notice lots under the open procedure; 41% of award lots won by a consortium; average awarded lot €2.0M.

2027 renewals. 200 tenders (257 lots) reach the end of their term in 2027, estimated value €737M. Largest: HaDEA, HADEA/2023/OP/0036 - Speed up the Development of and… (€82.0M, 2027-09); DG HOME, EU Knowledge Hub on Prevention of Radicalisation (€60.0M, 2027-09); DG RTD, Framework Contracts for the Impact Assessments, Evalu… (€52.0M, 2027-04).

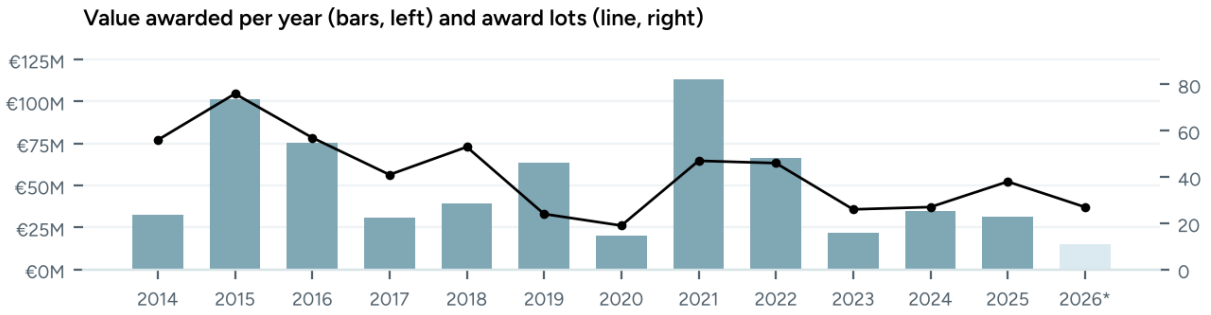
9.5 Research

Policy and research

€645M
awarded, 537 lots, 2014–2026*

€35M
per year since 2022 (-42% on 2014–2021)

737
suppliers; top 5 win 20%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Research	163	€319M	49%	€33M	€11M
Food safety	139	€95M	15%	€5M	€11M
Defence	109	€88M	14%	€8M	€5M
Transport	46	€52M	8%	€6M	€1M
Health	23	€31M	5%	€2M	€2M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
EFSA	158	€109M	Company 107 (Laboratory services)	5	€50M
Fusion for Energy	3	€63M	Company 292 (Research institute)	4	€27M
EMA	19	€54M	Company 351 (Research institute)	3	€23M
ECDC	5	€53M	Company 285 (Research institute)	19	€14M
European Defence Agency	116	€49M	Company 202 (University)	27	€12M

By value, 2014–2026*. 50 buyers and 737 suppliers in total.

How it is bought. 99% of notice lots under the open procedure; 39% of award lots won by a consortium; average awarded lot €1.2M.

2027 renewals. 16 tenders (27 lots) reach the end of their term in 2027, estimated value €23M. Largest: ECHA, Development of New Approach Methodologies (NAM) Based… (€6.0M, 2027-04); JRC, Counter UAS solutions (€4.5M, 2027-07); European Defence Agency, Uptake of Innovation Autonomous Systems for Cross-dom… (€2.9M, 2027-07).

9.6 Economics

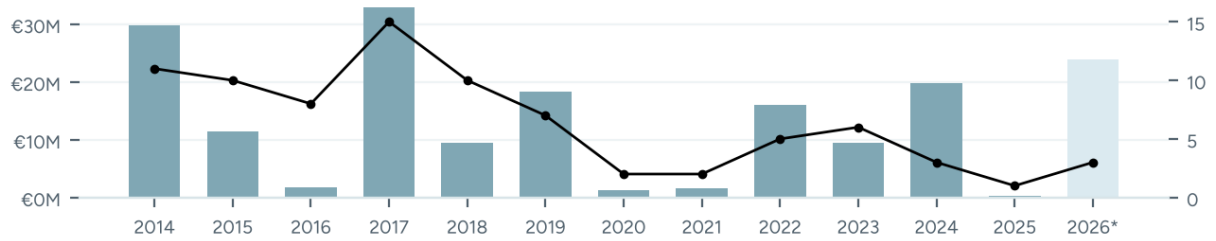
Policy and research

€176M
awarded, 83 lots, 2014–2026*

€14M
per year since 2022 (+7% on 2014–2021)

178
suppliers; top 5 win 28%

Value awarded per year (bars, left) and award lots (line, right)



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Economics	83	€176M	100%	€13M	€14M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG GROW	15	€62M	Company 202 (University)	8	€18M
JRC	13	€25M	Company 44 (Consultancy)	11	€11M
CHAFEA	2	€16M	Company 12 (Big Four firm)	7	€7M
DG TAXUD	2	€13M	Company 4 (Big Four firm)	6	€6M
DG ENV	3	€12M	Company 141 (Consultancy)	4	€6M

By value, 2014–2026*. 29 buyers and 178 suppliers in total.

How it is bought. 99% of notice lots under the open procedure; 43% of award lots won by a consortium; average awarded lot €2.1M.

2027 renewals. 2 tenders (2 lots) reach the end of their term in 2027, estimated value €1M. Largest: DG ECFIN, Open call for Consensus-type Economic forecasts (€0.6M, 2027-12); DG GROW, Assessing economic impacts in the construction sector… (€0.1M, 2027-05).

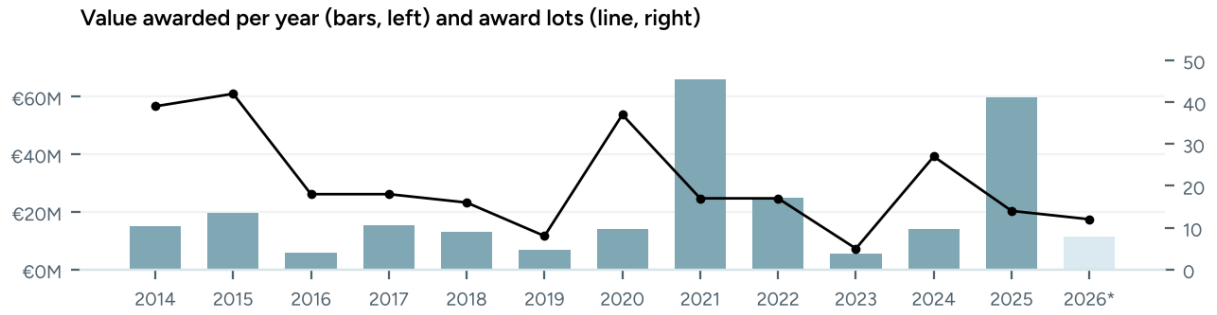
9.7 Statistics

Policy and research

€271M
awarded, 270 lots, 2014–2026*

€24M
per year since 2022 (+22% on 2014–2021)

116
suppliers; top 5 win 57%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Statistics	270	€271M	100%	€19M	€24M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
Eurostat	239	€208M	Company 30 (IT services)	72	€84M
EFSA	7	€45M	Company 136 (Consultancy)	26	€29M
EIGE	6	€5M	Company 338 (Statistical services)	56	€23M
ECDC	1	€4M	Company 438 (University)	3	€11M
DG EMPL	7	€3M	Company 425 (Consultancy)	19	€7M

By value, 2014–2026*. 15 buyers and 116 suppliers in total.

How it is bought. 100% of notice lots under the open procedure; 22% of award lots won by a consortium; average awarded lot €1.0M.

2027 renewals. 11 tenders (21 lots) reach the end of their term in 2027, estimated value €10M. Largest: Eurostat, Transport Statistics (€3.9M, 2027-10); Eurostat, Support on statistics on specific waste (€1.1M, 2027-11); Eurostat, Provision of services and activities for the implemen… (€1.0M, 2027-12).

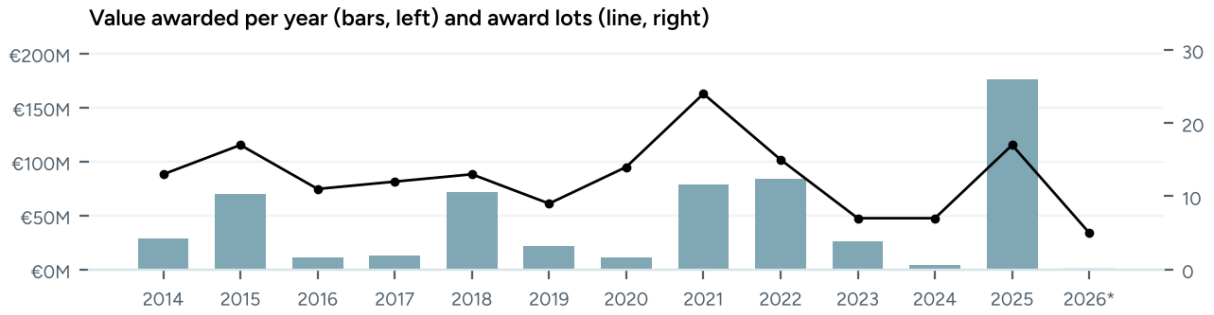
9.8 Survey

Policy and research

€597M
awarded, 164 lots, 2014–2026*

€60M
per year since 2022 (+57% on 2014–2021)

122
suppliers; top 5 win 82%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Survey	164	€597M	100%	€38M	€60M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG COMM	7	€329M	Company 60 (Market research)	30	€214M
European Central Bank	6	€43M	Company 77 (Market research)	44	€156M
Eurostat	38	€43M	Company 126 (Market research)	5	€85M
Eurofound	15	€32M	Company 392 (Market research)	1	€20M
CHAFEA	7	€29M	Company 273 (Market research)	3	€14M

By value, 2014–2026*. 35 buyers and 122 suppliers in total.

How it is bought. 97% of notice lots under the open procedure; 26% of award lots won by a consortium; average awarded lot €3.7M.

2027 renewals. 4 tenders (4 lots) reach the end of their term in 2027, estimated value €20M. Largest: European Central Bank, Internet-based Consumer Expectations Survey (€14.0M, 2027-08); Eurofound, Preparation and implementation of the European Qualit… (€5.3M, 2027-07); European Central Bank, Consultancy Services for Engagement Surveys (pulse su… (€0.4M, 2027-02).

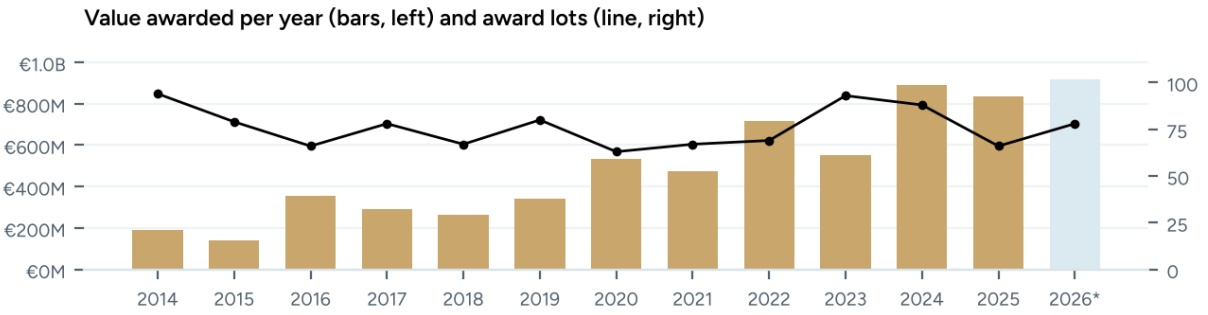
9.9 Comms

Communication and media

€6.5B
awarded, 988 lots, 2014–2026*

€803M
per year since 2022 (+148% on 2014–2021)

790
suppliers; top 5 win 30%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Events	389	€2.5B	39%	€149M	€270M
Comms	328	€1.5B	23%	€53M	€227M
Campaign	46	€1.2B	19%	€70M	€138M
Multimedia	130	€1.1B	17%	€42M	€161M
Design	95	€116M	2%	€10M	€7M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG COMM	192	€2.4B	Company 10 (Consultancy)	56	€702M
DG SCIC	17	€885M	Company 49 (Communication agency)	41	€350M
European Parliament	155	€614M	Company 61 (Communication agency)	11	€324M
DG RTD	7	€243M	Company 47 (Communication agency)	93	€306M
EISMEA	14	€210M	Company 58 (Communication agency)	26	€241M

By value, 2014–2026*. 109 buyers and 790 suppliers in total.

How it is bought. 96% of notice lots under the open procedure; 24% of award lots won by a consortium; average awarded lot €6.6M.

2027 renewals. 76 tenders (114 lots) reach the end of their term in 2027, estimated value €733M. Largest: DG SCIC, Provision of Conference Services (€270.0M, 2027-06); DG RTD, Event Management and Related Communication Services (€168.0M, 2027-10); European Investment Bank, Multiple Framework Agreement to Support EIB's Communi… (€43.5M, 2027-06).

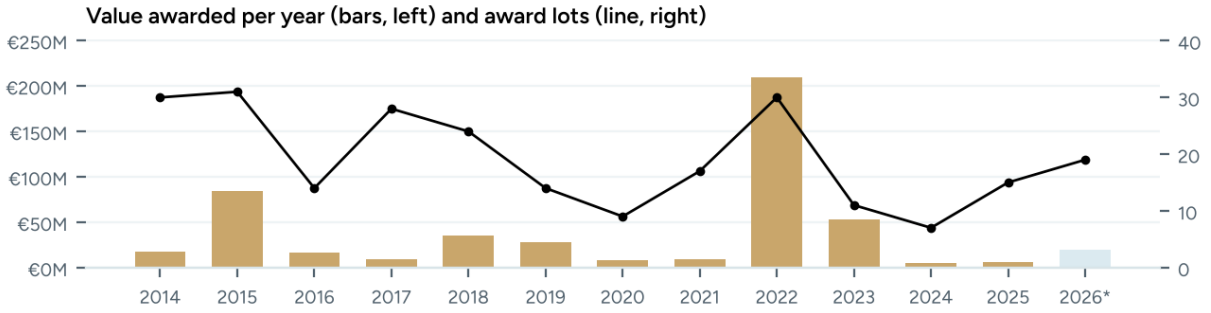
9.10 Media

Communication and media

€500M
awarded, 249 lots, 2014–2026*

€60M
per year since 2022 (+132% on 2014–2021)

122
suppliers; top 5 win 64%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Subscription	76	€228M	46%	€3M	€42M
Monitoring	156	€210M	42%	€15M	€19M
TV&Radio	17	€62M	12%	€8M	€0M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
Publications Office	3	€195M	Company 93 (Data provider)	13	€175M
DG COMM	43	€147M	Company 207 (Media services)	2	€57M
European Parliament	119	€104M	Company 60 (Market research)	18	€38M
European Central Bank	10	€18M	Company 336 (Media services)	2	€25M
Council of the EU	15	€12M	Company 352 (Media services)	3	€23M

By value, 2014–2026*. 36 buyers and 122 suppliers in total.

How it is bought. 99% of notice lots under the open procedure; 4% of award lots won by a consortium; average awarded lot €2.1M.

2027 renewals. 7 tenders (8 lots) reach the end of their term in 2027, estimated value €26M. Largest: Publications Office, Provision of Subscriptions to General and Internation… (€24.5M, 2027-03); European Parliament, Monitoring and analysis services of the Hungarian media (€0.6M, 2027-12); EEA, EEA/COM/23/002 - Media Monitoring Services to the Eur… (€0.4M, 2027-05).

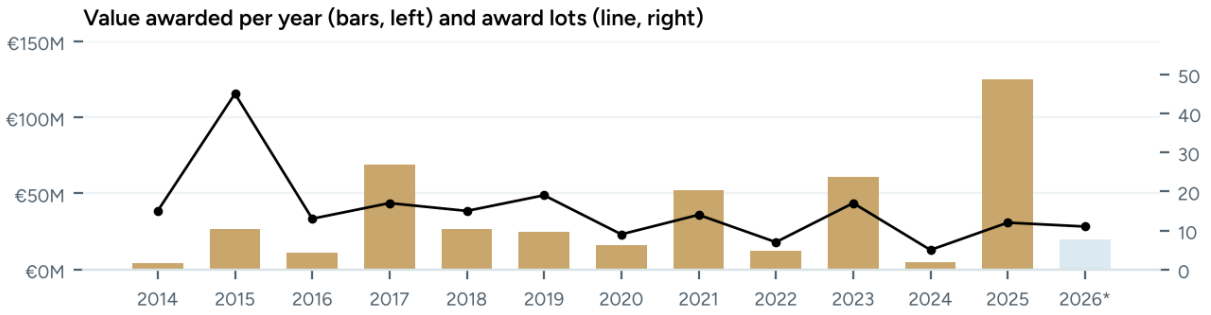
9.11 Printing & Publishing

Communication and media

€455M
awarded, 199 lots, 2014–2026*

€46M
per year since 2022 (+58% on 2014–2021)

196
suppliers; top 5 win 38%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Printing & Publishing	83	€356M	78%	€18M	€43M
Editorial	79	€59M	13%	€6M	€3M
Archive	13	€23M	5%	€3M	€0M
Photography	8	€12M	3%	€1M	€0M
Layout	16	€5M	1%	€1M	€0M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
Publications Office	57	€180M	Company 150 (Print and document services)	2	€87M
DG DIGIT	1	€82M	Company 294 (Print and document services)	8	€25M
OIB	2	€48M	Company 252 (Print and document services)	8	€21M
European Parliament	24	€46M	Company 362 (Print and document services)	24	€21M
European Central Bank	15	€19M	Company 173 (Language services)	10	€19M

By value, 2014–2026*. 37 buyers and 196 suppliers in total.

How it is bought. 97% of notice lots under the open procedure; 11% of award lots won by a consortium; average awarded lot €2.4M.

2027 renewals. 6 tenders (11 lots) reach the end of their term in 2027, estimated value €26M. Largest: EPO, Classification, reclassification and deep-indexing of… (€16.7M, 2027-08); EMA, Managed Print and Ancillary Services (€3.9M, 2027-03); European Parliament, Serials Subscriptions Services (Print and Online) and… (€3.2M, 2027-06).

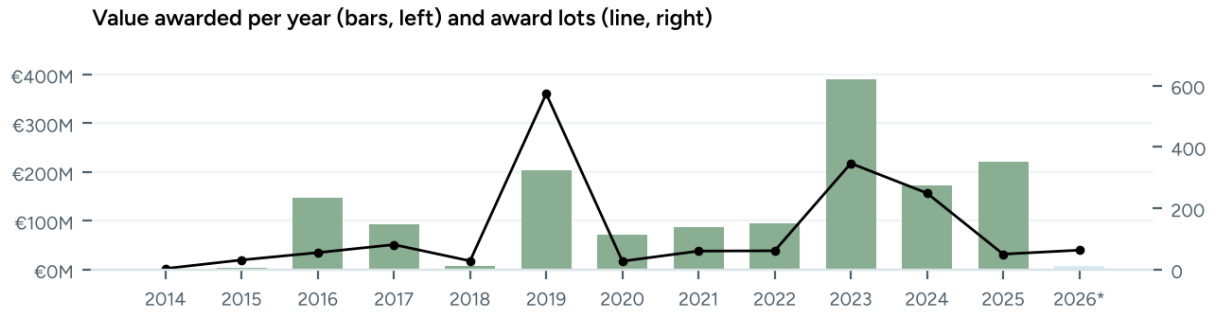
9.12 Translation

Language

€1.5B
awarded, 1,627 lots, 2014–2026*

€182M
per year since 2022 (+137% on 2014–2021)

625
suppliers; top 5 win 33%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Translation	1,557	€986M	66%	€45M	€128M
Interpretation	70	€512M	34%	€31M	€54M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
Translation Centre	1,348	€505M	Company 116 (Language services)	243	€125M
European Parliament	103	€334M	Company 137 (Language services)	12	€104M
EUAA	30	€326M	Company 145 (Language services)	53	€97M
Frontex	8	€80M	Company 160 (Language services)	32	€83M
DG GROW	2	€70M	Company 164 (Language services)	225	€80M

By value, 2014–2026*. 29 buyers and 625 suppliers in total.

How it is bought. 84% of notice lots under the open procedure; 5% of award lots won by a consortium; average awarded lot €1.0M.

2027 renewals. 37 tenders (633 lots) reach the end of their term in 2027, estimated value €5M. Largest: Frontex, Framework Contract for Provision of Inte (€2.1M, 2027-06); European Central Bank, Legal Translation and Other Related Acti (€0.8M, 2027-12); ERA, Interpretation services for the European (€0.8M, 2027-04).

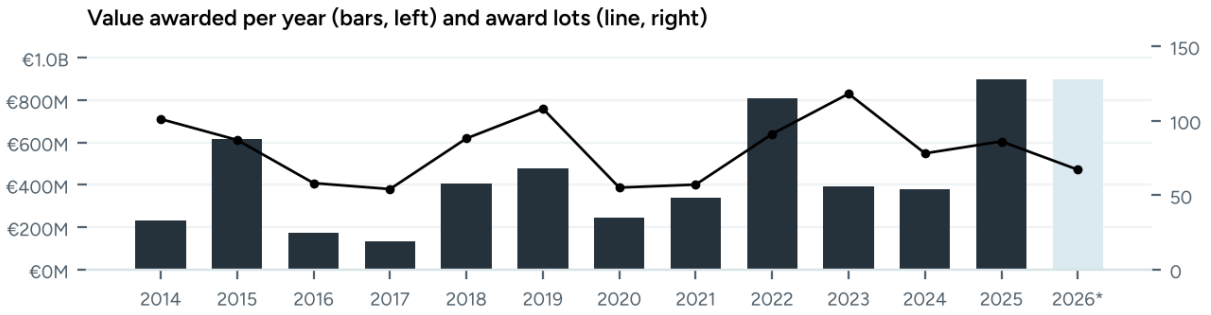
9.13 Support

Corporate services

€6.0B
awarded, 1,048 lots, 2014–2026*

€693M
per year since 2022 (+112% on 2014–2021)

645
suppliers; top 5 win 43%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Guard	252	€3.0B	50%	€137M	€393M
Catering	177	€1.0B	17%	€64M	€110M
Cleaning	252	€973M	16%	€64M	€95M
Support	272	€705M	12%	€43M	€74M
Accommodation	13	€87M	1%	€3M	€12M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG HR	12	€1.3B	Company 9 (Security services)	58	€1.1B
European Parliament	120	€756M	Company 27 (Security services)	8	€539M
European Investment Bank	24	€519M	Company 45 (Security services)	39	€379M
Council of the EU	35	€427M	Company 65 (Catering services)	14	€284M
Frontex	74	€360M	Company 57 (Catering services)	19	€249M

By value, 2014–2026*. 83 buyers and 645 suppliers in total.

How it is bought. 74% of notice lots under the open procedure; 5% of award lots won by a consortium; average awarded lot €5.9M.

2027 renewals. 88 tenders (107 lots) reach the end of their term in 2027, estimated value €162M. Largest: EMA, Catering and Hospitality Services (€12.9M, 2027-10); EMA, Security Services (€12.9M, 2027-04); JRC, Security and guard services at the Joint Research Cen… (€12.0M, 2027-04).

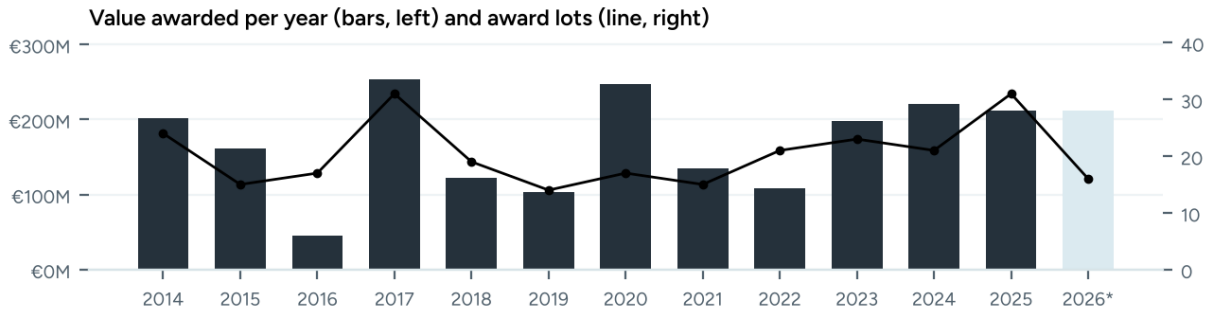
9.14 HR

Corporate services

€2.2B
awarded, 264 lots, 2014–2026*

€195M
per year since 2022 (+23% on 2014–2021)

230
suppliers; top 5 win 42%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Staffing	202	€1.8B	83%	€127M	€169M
HR	62	€385M	17%	€32M	€26M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
EUAA	15	€553M	Company 20 (Staffing agency)	41	€323M
DG HR	16	€367M	Company 53 (Staffing agency)	31	€293M
EACEA	3	€192M	Company 87 (Training provider)	3	€137M
European Investment Bank	16	€181M	Company 125 (Staffing agency)	41	€111M
EMA	12	€154M	Company 177 (Staffing agency)	5	€71M

By value, 2014–2026*. 51 buyers and 230 suppliers in total.

How it is bought. 90% of notice lots under the open procedure; 17% of award lots won by a consortium; average awarded lot €8.8M.

2027 renewals. 21 tenders (24 lots) reach the end of their term in 2027, estimated value €98M. Largest: European Investment Bank, Recruitment and Administration of Temporary Staff for… (€62.2M, 2027-12); ECHA, Interim Services for ECHA and the European Commission… (€7.6M, 2027-11); European Central Bank, Leadership Assessment Services (€6.0M, 2027-04).

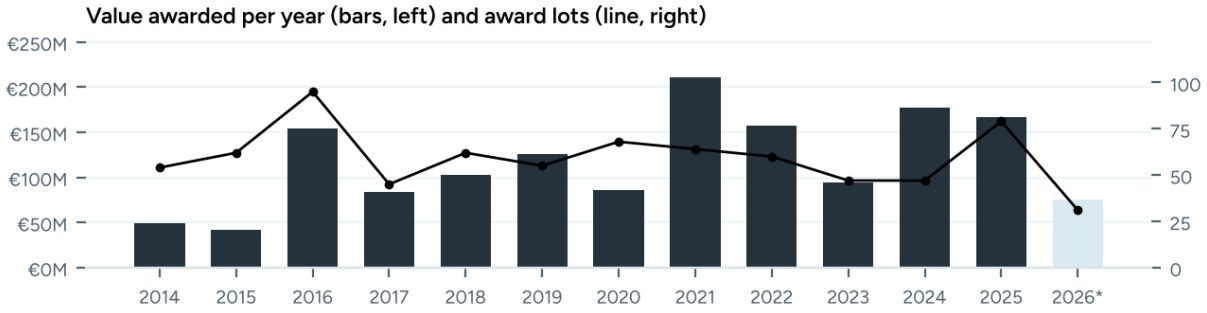
9.15 Training

Corporate services

€1.5B
awarded, 769 lots, 2014–2026*

€138M
per year since 2022 (+29% on 2014–2021)

692
suppliers; top 5 win 22%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Technical	399	€512M	34%	€33M	€50M
Management	72	€345M	23%	€25M	€31M
Language	139	€184M	12%	€13M	€17M
e-Learning	43	€158M	10%	€8M	€19M
ICT	17	€106M	7%	€13M	€1M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG HR	91	€541M	Company 154 (Training provider)	8	€87M
CHAFEA	72	€135M	Company 4 (Big Four firm)	25	€79M
DG ECHO	63	€106M	Company 87 (Training provider)	38	€58M
EPSO	18	€101M	Company 176 (Training provider)	11	€58M
EACEA	7	€95M	Company 214 (Training provider)	6	€53M

By value, 2014–2026*. 75 buyers and 692 suppliers in total.

How it is bought. 93% of notice lots under the open procedure; 32% of award lots won by a consortium; average awarded lot €2.0M.

2027 renewals. 31 tenders (68 lots) reach the end of their term in 2027, estimated value €66M. Largest: DG TAXUD, Pro-Train - Lot 1: Training Support Services, Lot 2:... (€30.0M, 2027-04); European Central Bank, Leadership Development Services (€5.0M, 2027-05); EISMEA, Strategic Procurement Training for Public Buyers (€3.9M, 2027-06).

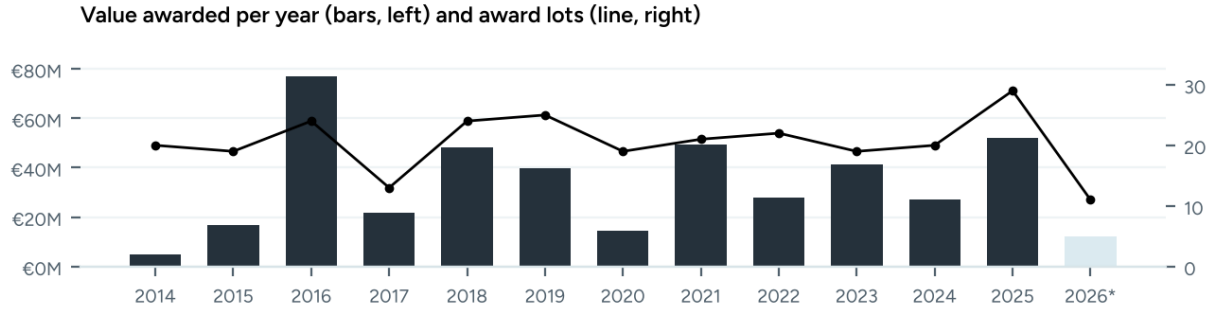
9.16 Legal

Corporate services

€434M
awarded, 266 lots, 2014–2026*

€33M
per year since 2022 (-3% on 2014–2021)

288
suppliers; top 5 win 20%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Legal	266	€434M	100%	€34M	€33M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
SRB	6	€74M	Company 372 (Law firm)	9	€22M
European Investment Bank	21	€56M	Company 36 (Big Four firm)	14	€20M
DG MOVE	9	€39M	Company 122 (Consultancy)	22	€18M
EISMEA	12	€34M	Company 474 (Law firm)	20	€16M
DG JUST	18	€30M	Company 379 (University)	4	€13M

By value, 2014–2026*. 63 buyers and 288 suppliers in total.

How it is bought. 83% of notice lots under the open procedure; 24% of award lots won by a consortium; average awarded lot €1.7M.

2027 renewals. 12 tenders (26 lots) reach the end of their term in 2027, estimated value €24M. Largest: European Investment Bank, Legal Services under English and Italian Law, and Mul… (€9.4M, 2027-07); CoE, CALL FOR TENDERS FOR THE PROVISION OF CYBERCRIME AND… (€5.0M, 2027-06); DG CLIMA, Framework Contract on Auctioning of Emission Allowanc… (€3.0M, 2027-08).

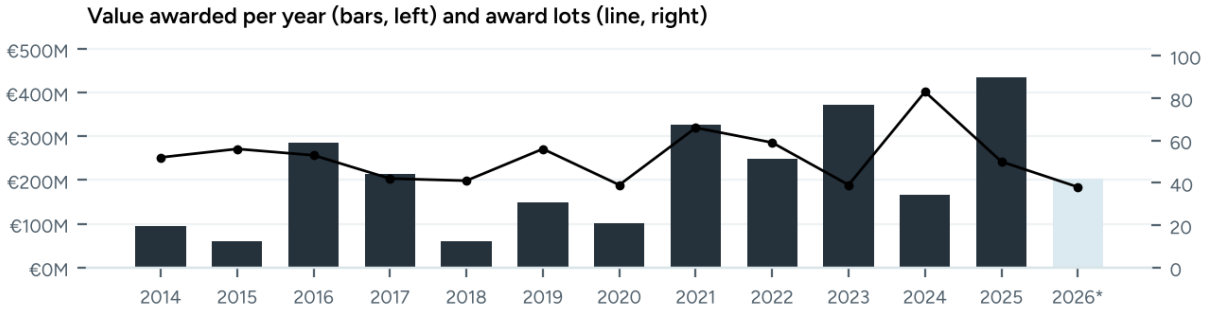
9.17 Finance

Corporate services

€2.7B
awarded, 674 lots, 2014–2026*

€292M
per year since 2022 (+81% on 2014–2021)

464
suppliers; top 5 win 44%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Finance	271	€1.0B	37%	€64M	€103M
Audits	99	€886M	33%	€45M	€107M
Insurance	175	€467M	17%	€42M	€27M
Accounting	37	€286M	11%	€5M	€50M
Banking	81	€56M	2%	€4M	€5M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
European Central Bank	80	€590M	Company 4 (Big Four firm)	126	€346M
DG BUDG	35	€540M	Company 17 (Big Four firm)	93	€340M
European Investment Bank	81	€336M	Company 12 (Big Four firm)	111	€225M
SRB	9	€200M	Company 104 (Insurer)	6	€149M
DG RTD	6	€134M	Company 36 (Big Four firm)	60	€140M

By value, 2014–2026*. 91 buyers and 464 suppliers in total.

How it is bought. 78% of notice lots under the open procedure; 20% of award lots won by a consortium; average awarded lot €4.5M.

2027 renewals. 40 tenders (62 lots) reach the end of their term in 2027, estimated value €327M. Largest: PMO, Accident risk insurance (€136.5M, 2027-06); SRB, SRB/OP/1/2023 - Provision of Strategic Consultancy, A… (€30.0M, 2027-06); DG BUDG, The Provision of Technical Assistance Services in the… (€30.0M, 2027-07).

9.18 Tax

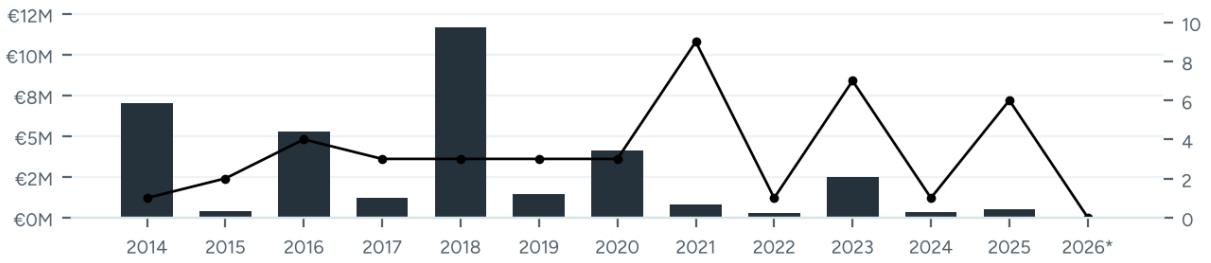
Corporate services

€35M
awarded, 43 lots, 2014–2026*

€1M
per year since 2022 (-81% on 2014–2021)

31
suppliers; top 5 win 63%

Value awarded per year (bars, left) and award lots (line, right)



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Tax	43	€35M	100%	€4M	€1M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG TAXUD	17	€29M	Company 4 (Big Four firm)	2	€7M
JRC	22	€2M	Company 12 (Big Four firm)	4	€6M
DG EMPL	1	€2M	Company 894 (Consultancy)	4	€4M
EIF	2	€2M	Company 976 (Law firm)	2	€3M
ENISA	1	€0M	Company 1093 (University)	4	€2M

By value, 2014–2026*. 5 buyers and 31 suppliers in total.

How it is bought. 100% of notice lots under the open procedure; 19% of award lots won by a consortium; average awarded lot €0.8M.

2027 renewals. 3 tenders (10 lots) reach the end of their term in 2027, estimated value €1M. Largest: EIF, Provision of Operational Tax Advisory Services to the… (€0.9M, 2027-06); JRC, TECHNICAL SUPPORT FOR THE DEVELOPMENT AND UPDATE OF E… (€0.6M, 2027-07).

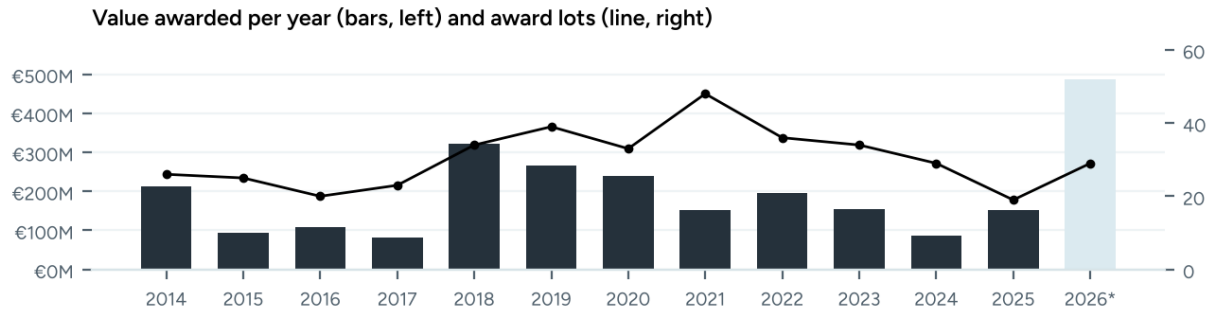
9.19 Management Consulting

Corporate services

€2.6B
awarded, 395 lots, 2014–2026*

€221M
per year since 2022 (+20% on 2014–2021)

546
suppliers; top 5 win 32%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Management Consulting	365	€2.1B	83%	€130M	€218M
Benchmarking	8	€225M	9%	€28M	€0M
Management & Monitoring	22	€219M	9%	€26M	€3M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG DIGIT	8	€543M	Company 4 (Big Four firm)	83	€330M
EUIPO	10	€283M	Company 12 (Big Four firm)	84	€213M
EFSA	18	€233M	Company 36 (Big Four firm)	21	€103M
European Investment Bank	80	€225M	Company 1 (IT services)	21	€93M
DG REFORM	5	€145M	Company 17 (Big Four firm)	47	€87M

By value, 2014–2026*. 81 buyers and 546 suppliers in total.

How it is bought. 92% of notice lots under the open procedure; 37% of award lots won by a consortium; average awarded lot €6.6M.

2027 renewals. 17 tenders (20 lots) reach the end of their term in 2027, estimated value €137M. Largest: DG COMM, Dynamic Purchasing System (DPS) for Services Related… (€50.0M, 2027-07); EACEA, Call for Tenders for Provision of Services for Erasmu… (€15.0M, 2027-07); DG CONNECT, Support Services to Simpl's Programme Support Office… (€15.0M, 2027-08).

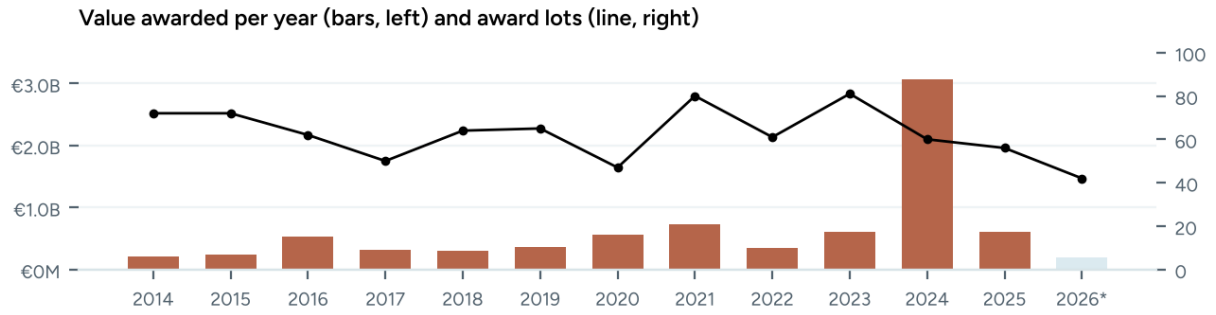
9.20 Engineering

Facilities, engineering and transport

€8.1B
awarded, 812 lots, 2014–2026*

€992M
per year since 2022 (+143% on 2014–2021)

786
suppliers; top 5 win 23%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Engineering	593	€7.4B	91%	€363M	€921M
Architectural	106	€312M	4%	€24M	€25M
Construction	51	€214M	3%	€4M	€37M
Inspections	56	€164M	2%	€15M	€9M
Installations	6	€11M	0%	€1M	€0M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
DG DEFIS	9	€2.1B	Company 8 (Space and defence)	22	€730M
EUSPA	46	€1.3B	Company 31 (Space and defence)	31	€421M
EMSA	49	€1.1B	Company 33 (Earth observation)	9	€410M
Fusion for Energy	130	€701M	Company 76 (Space and defence)	9	€159M
Frontex	41	€672M	Company 94 (Aviation services)	13	€145M

By value, 2014–2026*. 58 buyers and 786 suppliers in total.

How it is bought. 85% of notice lots under the open procedure; 27% of award lots won by a consortium; average awarded lot €10.5M.

2027 renewals. 54 tenders (65 lots) reach the end of their term in 2027, estimated value €606M. Largest: Frontex, FRONTEX Surveillance Aircraft Services for Land and M… (€168.6M, 2027-11); European Defence Agency, In-theatre Aeromedical Evacuation Services - AIRMEDEVAC (€140.0M, 2027-04); DG DEFIS, G2 System Support Phase CDE System AIV (€66.6M, 2027-08).

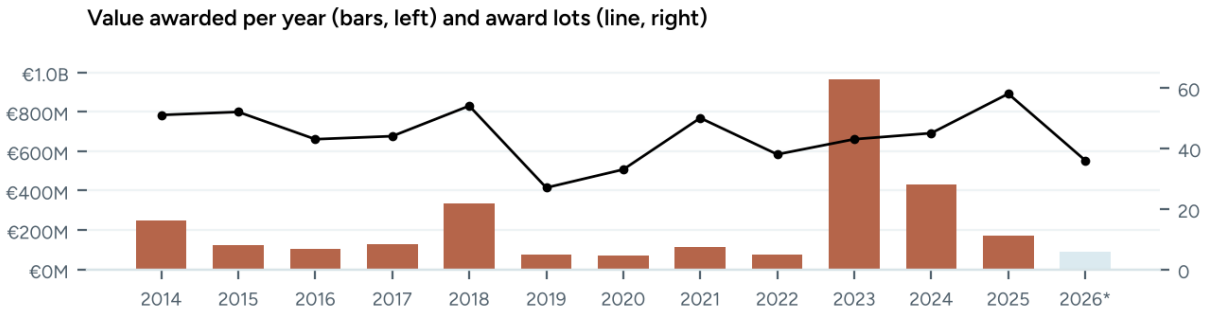
9.21 Repair

Facilities, engineering and transport

€2.9B
awarded, 574 lots, 2014–2026*

€355M
per year since 2022 (+136% on 2014–2021)

352
suppliers; top 5 win 56%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Buildings	312	€2.4B	83%	€111M	€321M
Technical	124	€169M	6%	€11M	€17M
AV	28	€167M	6%	€16M	€7M
Others	25	€58M	2%	€3M	€6M
Repair	29	€36M	1%	€4M	€1M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
European Parliament	107	€948M	Company 11 (Facility services)	18	€979M
OIB	42	€861M	Company 50 (Facility services)	7	€285M
Council of the EU	27	€296M	Company 82 (Facility services)	8	€206M
JRC	193	€186M	Company 130 (Facility services)	12	€114M
European Investment Bank	3	€97M	Company 185 (Facility services)	3	€68M

By value, 2014–2026*. 49 buyers and 352 suppliers in total.

How it is bought. 83% of notice lots under the open procedure; 5% of award lots won by a consortium; average awarded lot €5.2M.

2027 renewals. 35 tenders (60 lots) reach the end of their term in 2027, estimated value €119M. Largest: European Investment Bank, Provision of Facilities Maintenance Services: Multi-t… (€79.5M, 2027-05); ECA, Maintenance of installations and electrical, HVAC and… (€6.9M, 2027-04); EUAA, Provision of General Maintenance (Mechanical and Elec… (€6.8M, 2027-10).

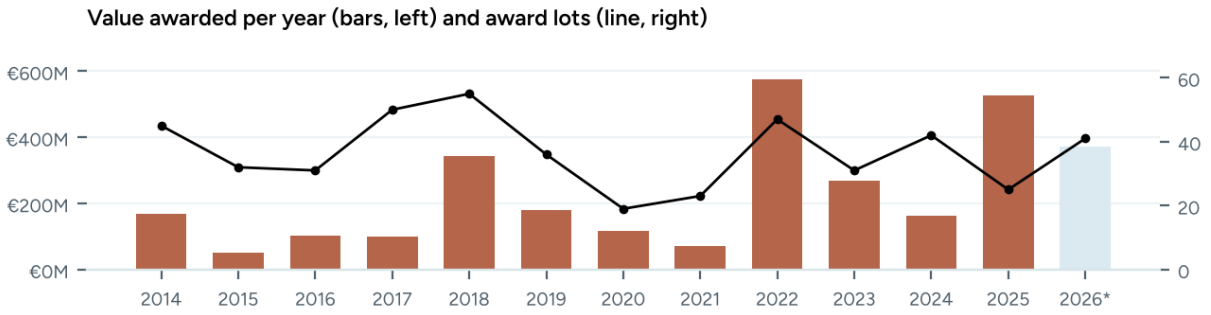
9.22 Transport

Facilities, engineering and transport

€3.0B
awarded, 477 lots, 2014–2026*

€391M
per year since 2022 (+177% on 2014–2021)

288
suppliers; top 5 win 37%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Travel agency	114	€1.6B	54%	€49M	€254M
Air	25	€337M	11%	€34M	€14M
Road	110	€317M	10%	€11M	€46M
Water	35	€272M	9%	€10M	€40M
Mail	87	€145M	5%	€13M	€9M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
Frontex	52	€591M	Company 43 (Travel services)	7	€399M
DG ECHO	6	€391M	Company 69 (Travel services)	3	€256M
DG EAC	2	€345M	Company 59 (Events agency)	3	€183M
EACEA	1	€250M	Company 100 (Travel services)	2	€156M
OIB	46	€207M	Company 121 (Aviation services)	3	€125M

By value, 2014–2026*. 61 buyers and 288 suppliers in total.

How it is bought. 84% of notice lots under the open procedure; 10% of award lots won by a consortium; average awarded lot €6.5M.

2027 renewals. 36 tenders (45 lots) reach the end of their term in 2027, estimated value €780M. Largest: Frontex, Provision of Travel Agency Services to FRONTEX (€526.0M, 2027-01); Frontex, Short Notice Chartering of Aircraft for FRONTEX Suppo… (€46.2M, 2027-07); Frontex, Provision of Duty Car Rental Services (€31.8M, 2027-02).

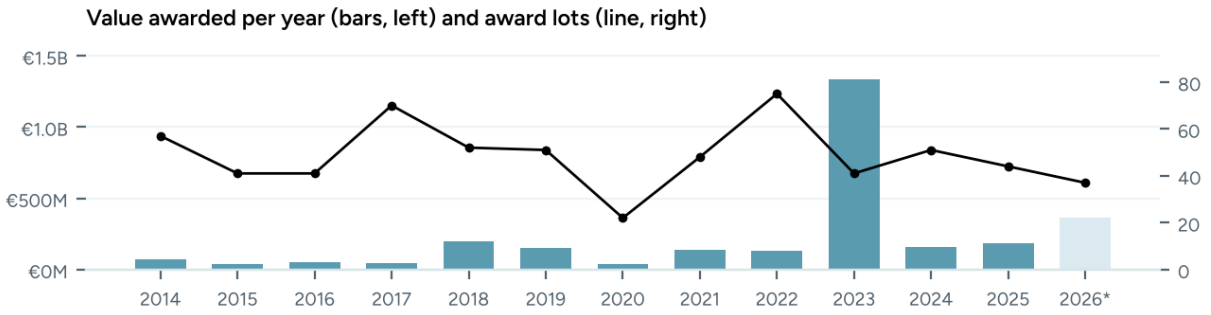
9.23 Health

Health

€2.9B
awarded, 630 lots, 2014–2026*

€447M
per year since 2022 (+394% on 2014–2021)

625
suppliers; top 5 win 19%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Health	304	€2.1B	72%	€35M	€373M
Creche	42	€519M	18%	€43M	€36M
Medical	261	€258M	9%	€10M	€36M
Occupational	23	€23M	1%	€2M	€2M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
HaDEA	16	€1.6B	Company 88 (Health services)	11	€167M
OIB	24	€299M	Company 142 (Childcare provider)	5	€98M
ECDC	155	€271M	Company 143 (Childcare provider)	9	€97M
Council of the EU	21	€200M	Company 107 (Laboratory services)	9	€88M
European Parliament	68	€193M	Company 152 (Childcare provider)	10	€88M

By value, 2014–2026*. 63 buyers and 625 suppliers in total.

How it is bought. 92% of notice lots under the open procedure; 12% of award lots won by a consortium; average awarded lot €4.7M.

2027 renewals. 30 tenders (52 lots) reach the end of their term in 2027, estimated value €97M. Largest: ECDC, DNA Extraction and Whole Genome Sequencing Services f… (€47.6M, 2027-11); Frontex, Provision of Medical Services for FRONTEX (€21.0M, 2027-08); European Investment Bank, Third Party Administrator (TPA) - Management of HIS R… (€12.5M, 2027-04).

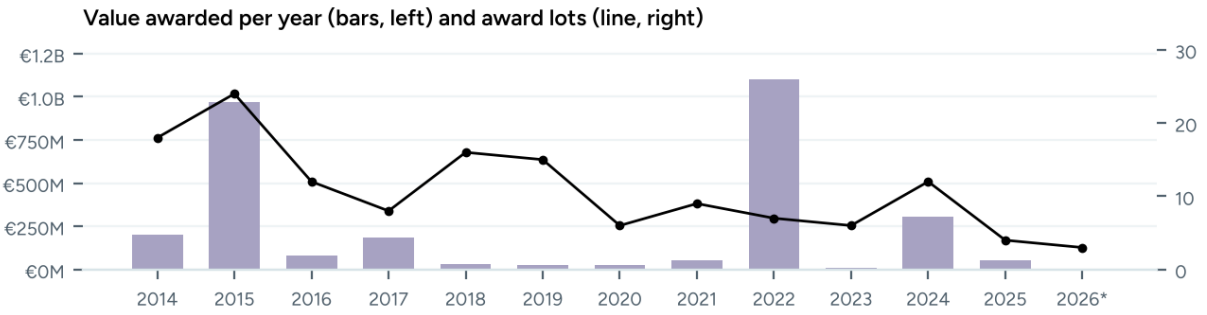
9.24 Galileo

Space

€3.1B
awarded, 140 lots, 2014–2026*

€303M
per year since 2022 (+54% on 2014–2021)

82
suppliers; top 5 win 81%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Galileo	140	€3.1B	100%	€197M	€303M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
EUSPA	74	€2.5B	Company 15 (Space and defence)	6	€877M
DG GROW	50	€511M	Company 24 (Space agency)	2	€711M
DG DEFIS	14	€10M	Company 8 (Space and defence)	20	€366M
ESA	1	€1M	Company 54 (Space and defence)	4	€345M
European Defence Agency	1	€0M	Company 98 (Space agency)	5	€157M

By value, 2014–2026*. 7 buyers and 82 suppliers in total.

How it is bought. 87% of notice lots under the open procedure; 9% of award lots won by a consortium; average awarded lot €21.8M.

2027 renewals. 6 tenders (6 lots) reach the end of their term in 2027, estimated value €15M. Largest: EUSPA, Maintenance and multi-services for the Galileo Securi… (€6.0M, 2027-07); EUSPA, Galileo Reference Centre (GRC) Facilities Management… (€3.0M, 2027-04); DG DEFIS, Pilot project for Search and Rescue operations for Ma… (€3.0M, 2027-07).

Technical support to the Galileo programme also appears under Engineering.

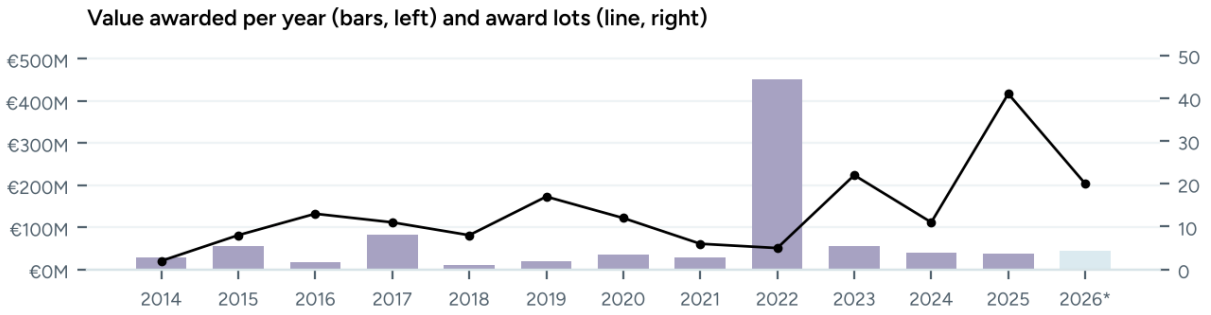
9.25 Copernicus

Space

€905M
awarded, 176 lots, 2014–2026*

€129M
per year since 2022 (+272% on 2014–2021)

189
suppliers; top 5 win 67%



Main topics	Lots	Value	% of segment	Per year 2014–21	Per year 2022–26*
Copernicus	176	€905M	100%	€35M	€129M

Largest buyers	Lots	Value	Largest suppliers	Lots	Value (own share)
EC	2	€449M	Company 29 (Space and defence)	4	€514M
EEA	86	€146M	Company 230 (Earth observation)	24	€24M
JRC	27	€116M	Company 33 (Earth observation)	12	€23M
DG GROW	6	€84M	Company 299 (Earth observation)	23	€22M
ECMWF	43	€80M	Company 344 (Earth observation)	4	€21M

By value, 2014–2026*. 11 buyers and 189 suppliers in total.

How it is bought. 100% of notice lots under the open procedure; 41% of award lots won by a consortium; average awarded lot €5.2M.

2027 renewals. 19 tenders (22 lots) reach the end of their term in 2027, estimated value €87M. Largest: JRC, Framework Service Contract for Operating the CEMS 'Hy… (€12.6M, 2027-02); JRC, Copernicus Global Land Cover and Tropical Forest Mapp… (€11.3M, 2027-03); JRC, Copernicus Global Land Operations - Biophysical Varia… (€10.4M, 2027-03).

10. Outlook

- **Volume.** Awards have run at €9–12B a year since 2022. With €6.26B of tenders reaching term in 2027 and tendered value above €10B a year since 2023, there is no sign of a slowdown in the next two years.
- **Larger, longer contracts.** Growth has come from fewer, larger frameworks and dynamic purchasing systems rather than more contracts. This favours suppliers with scale and references, and pushes smaller firms towards consortia, subcontracting and the open purchasing systems.
- **Where the growth is.** Digital services, engineering and transport, communication and events, health and the space programmes have grown fastest. The agencies (HaDEA, Frontex, EUSPA), DG DEFIS, the EIB and the ECB are the buyers whose spending has grown most.
- **Where competition is open.** Policy, ICT, health, legal and training services are fragmented, with hundreds of active suppliers. Survey, space, telecoms and media are concentrated around a few incumbents.

11. Methodology

- **Source.** C4P market data: contract and award notices published by EU institutions, bodies and agencies (mainly via TED) since 2014, build of 15 November 2026. National procurement is excluded.
- **Scope.** The 25 C4P services segments. The supply segments are excluded. DG DIGIT's SIDE III software purchasing system is a software supply contract and is treated as equipment.
- **Exclusion.** External action procurement is excluded: the buyer codes DG INTPA, DG DEVCO, EU Delegation, C4P's external aid codes (Aid|…), FPI and EEAS.
- **Classification.** Each lot has one primary segment and topic, so every lot counts once in market totals.
- **Values.** Market values are awarded lot values. Supplier values are each supplier's own share; a lot shared by several suppliers counts for each, so supplier figures overlap. Framework and DPS values are ceilings.
- **Names.** Renamed buyers are combined with their predecessors, and renamed or merged companies are reported under their current name. Suppliers are not named in this edition: they are shown as Company 1, 2, … numbered by value won (own share) in services, with a type of company assigned for this report.
- **Suppliers.** More than 9,000 suppliers have won at least one services lot. Segment-level supplier figures cover each segment's 100 most active suppliers.
- **Renewals.** Expected end of term = publication date of the contract notice + contract duration, grouped by notice and assigned to the notice's primary segment. Each notice is counted once. Values are the published estimated values, or the values from separately compiled 2027 renewal lists for ICT, Policy and Communication.
- **Buyer types.** Assigned for this report from each buyer's legal status.

Annex A: top 50 suppliers by value

Supplier	Type	Value	Lots	Supplier	Type	Value	Lots
Company 1	IT services	€1.8B	234	Company 26	IT services	€631M	104
Company 2	IT services	€1.8B	133	Company 27	Security services	€541M	11
Company 3	IT services	€1.8B	247	Company 28	IT services	€516M	57
Company 4	Big Four firm	€1.7B	461	Company 29	Space and defence	€515M	7
Company 5	IT services	€1.5B	145	Company 30	IT services	€499M	164
Company 6	IT services	€1.3B	161	Company 31	Space and defence	€495M	69
Company 7	IT services	€1.3B	94	Company 32	IT services	€480M	8
Company 8	Space and defence	€1.2B	63	Company 33	Earth observation	€466M	38
Company 9	Security services	€1.2B	74	Company 34	IT services	€463M	32
Company 10	Consultancy	€1.1B	254	Company 35	IT services	€452M	39
Company 11	Facility services	€1.0B	29	Company 36	Big Four firm	€442M	153
Company 12	Big Four firm	€1.0B	475	Company 37	Outsourcing services	€441M	64
Company 13	IT services	€896M	87	Company 38	IT services	€431M	65
Company 14	IT services	€895M	69	Company 39	Telecoms operator	€430M	22
Company 15	Space and defence	€879M	8	Company 40	Space and defence	€416M	33
Company 16	Software and cloud	€803M	9	Company 41	IT services	€414M	70
Company 17	Big Four firm	€769M	326	Company 42	IT services	€404M	86
Company 18	IT services	€763M	179	Company 43	Travel services	€399M	7
Company 19	IT services	€736M	86	Company 44	Consultancy	€381M	307
Company 20	Staffing agency	€736M	47	Company 45	Security services	€380M	40
Company 21	IT services	€734M	67	Company 46	IT services	€370M	12
Company 22	Engineering consultancy	€722M	15	Company 47	Communication agency	€365M	115
Company 23	IT services	€718M	91	Company 48	IT services	€365M	37
Company 24	Space agency	€711M	2	Company 49	Communication agency	€363M	58
Company 25	IT services	€649M	35	Company 50	Facility services	€357M	11

Services, 2014–2026*, external action excluded. Value = own share. Suppliers are numbered by value won; types are assigned for this report.
Source: C4P market data, build of 15 Nov 2026. 2026* = awards published up to 15 Nov 2026.