

MAY 2026

GSB PULSE

Public Procurement of Security Services (Europe)



Exclusive Raw Data Analysis of 40,000+
Bid Announcements and Contract
Awards for Security Personnel Services

In Partnership with

**OPEN
CONTRACTING
PARTNERSHIP**

NASCO
National Association of Security Companies

An Interim Supplement to the
GLOBAL SECURITY BAROMETER

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To Our Readers,

First, thank you. We hope you will share this GSB Pulse issue widely amongst your networks. The issue shares initial analysis from our global, long-term study of public procurement of security services (the first data drop comes from Europe). This data gathering initiative hopes to provide useful context and facts for the many stakeholders involved worldwide and intends to inform the debate globally rather than influence a specific policy process in a specific region.

To public procurement professionals, we recognize the complexity of your role: balancing cost control, service continuity, legal compliance, and public accountability under tight timelines. This report is not about assigning blame; it aims to help you design clearer tenders and secure better outcomes for the public.

For security associations, this project is intended as an evidence-based tool to support your advocacy for workforce standards and fair contracting. It's intended to complement your past successes and strengthen your future efforts.

For security firms, while this is not a conventional market report, it highlights procurement trends and issues that matter to public authorities. We hope these insights help you position proposals that demonstrate capability, continuity, and value beyond price.

For policymakers, these findings highlight key trade-offs in procurement design. As you navigate the fine points of policy design, we encourage you to draw on the expertise of national security associations and regional bodies.

To all other stakeholders, data and facts are an important baseline for shared understanding and constructive debate — providing a foundation for practical improvements across the security ecosystem.

Our hope? That together, by combining evidence, expertise, and practical reforms, we can strengthen public security procurement to deliver safer, fairer, and more sustainable services for communities.



Founded in 1934, the Ligue plays a vital role in defining and maintaining the highest ethical and professional standards for the private security industry and supplies a forum to understand global trends and share best practice and ideas. Each of its 28 member companies are legally separate and independent entities and are not individually responsible for the contents of this report. The findings, interpretations and conclusions expressed do not necessarily represent the views of the entirety of its Members, partners, or other stakeholders, and the opinions reflected in this document are solely those of the authors. This report is based on publicly available historical procurement data, including data from Tenders Electronic Daily (TED). While reasonable efforts have been made to ensure accuracy, the information is provided for general informational purposes only and no warranty is given as to its completeness or reliability. To the fullest extent permitted by law, the International Security Ligue, its members, and partners disclaim liability for any loss or damage (including direct, indirect, economic, or consequential loss or damage) suffered as a result of relying on or using the contents of this document.

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Introduction

If you were to look at tens of thousands of public tenders for security services, *really* look, what would you find? What story would the data tell?

Stakeholders certainly have a sense of what narrative might emerge, but it would be built on assumptions — and perhaps colored by hope or even distorted by bias. Truth is, it's a big task requiring significant resources.

For years, dedicated individuals and groups have worked tirelessly and effectively to shine a light on the procurement issue. By delving deeply into publicly available data, this project adds further illumination. Because, despite the enormous amount of good work that has been done, there remains significant dark matter between what we think we know about public procurement for security services and on-the-ground reality.

Which is exactly why we've taken this project on. Public investment in security has enormous ramifications for taxpayers, for the security industry and its workers, and for public safety — so there is a deep need to understand what is (and what is not) driving awards in security services contracts.

Public authorities routinely outsource physical security tasks — street patrolling, static guarding, crowd control — to private providers. Understanding how such services are bought is essential for benchmarking quality and value-for-money, safeguarding transparency, and promoting competitive markets.

Through the objective lens of data, this issue identifies potential weaknesses in current procurement practices and suggests where improvement is needed to make public contracts for security

services more transparent, fairer, and based on quality of service rather than lowest bid.

This project comes at an important time.

EU procurement policy is undergoing a much-needed revision across all public agencies, and while the security sector is only part of the larger tale, it's a cautionary chapter. Current regulation may aim to make quality a sufficient part of public contracts, but this analysis suggests it's not fully meeting that goal.

It's also important. While there should be a high standard for integrity, quality, and transparency in all public tenders — to prevent corruption and be ensure good stewardship of taxpayer money — it's especially vital in security services where negative consequences and contract failures pose significant risk to public safety.

Finally, it's timely. In today's riskier world, public agencies need security professionals who can evaluate and analyze emerging conditions, respond intelligently in emergencies, and work in tandem with new technology to provide a higher level of protection — and many security firms have enhanced their expertise and made significant investments to meet these new demands.

But benefitting from quality improvements and industry investment can't happen if public authorities allow bid-price to hijack the security contracting process. Which is why this data research asks an important question: **Are we content with the story data tells, or must we take action to improve the narrative?**

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About the Issue

The first edition of our GSB Pulse was dedicated to improving the health and safety of security officers through collection and analysis of benchmarking data, solution sharing, and case studies. It was all about improving working conditions for the people on the frontline that protect us every day.

Though it may seem that our second GSB Pulse, which reports the results of extensive public tender data analysis, is unrelated — there is a close connection.

About our Research

This project was initiated more than one year ago, catalyzed by numerous security firms expressing dissatisfaction in how some public security contracts were being filled around the globe. That this issue of GSB Pulse is coming out only now — more than one year later — speaks to the significant obstacles in obtaining complete and accurate data.

Ultimately, the lack of reliable data demanded that we build our own database. We downloaded nearly 40,000 records upon which we conducted our analysis.

Although the effort proved monumental, the result is what we believe is the single largest examination of sector-specific public procurement ever conducted.

Our data driven analysis is structured in a consistent and transparent way, using

About our Aim

This issue is part of a global, long-term research study dedicated to identifying structural patterns in procurement across areas, not on influencing specific initiatives.

For example, while we are aware of the ongoing revision of the EU Procurement Directive, we have deliberately avoided

Public procurement practices directly impact the lives of frontline security professionals. Salaries, training, working conditions — they are all subject to market forces, so when procurement practices encourage a race-to-the-bottom, the lives of security professionals get demonstrably worse.

We encourage all readers to share this issue widely to encourage a better understanding of how current procurement practices are impacting the lives of both security professionals and the public they serve.

defined datasets, timeframes, and methodologies to ensure comparability. While unique in its depth, the findings broadly align with prior reviews of public procurement across industries and in those with a broader scope that include services and goods. To help readers to understand if or why divergencies exist (arising from differences in datasets, definitions, time spans, and so on) we provide details on our datasets and definitions, including offering methodological details at the end of this report.

Using the research template we developed, we look forward to conducting analysis of data worldwide to enhance understanding of how public procurement of security services differs around the world.

analyzing these findings in light of it. We leave this to other sector stakeholders.

Our focus remains global rather than on individual regional initiatives.

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Acknowledgements

This GSB Pulse reflects the collective efforts of many individuals who worked tirelessly to overcome roadblocks in bringing it to life.

Chief among them is our data analyst, **Edoardo Camerinelli**. With no research project to model after, this study required a significant amount of trial and error, with several false starts and dead ends demanding significant pivots. Eduardo's unique research skills and dedication were critical to overcoming these obstacles.

This research endeavor was not possible without the guiding hand of **Open Contracting Partnership** and especially **Georg Neumann** and **Yohanna Lisnichuk**.

About our Partners

This global data gathering initiative is a joint endeavor of three organizations that share the common goals of improving transparency and quality in public service contracts. The International Security Ligue is proud to be joined in this effort by two dedicated partner organizations whose collaboration have meaningfully strengthened this work.

Open Contracting Partnership works globally with governments, businesses, and civil society to make public procurement fairer, more efficient, and more sustainable. It is a nonprofit organization active in over 50 countries and helps transform procurement from an overlooked, underfunded paper-based chore to a

They were instrumental in the early stages of our work and provided critical stress testing of our data analysis methodologies.

For their generous support, which includes expanding future data analysis into North America, we thank **Steve Amitay** and **NASCO**, a U.S.-based association promoting public awareness of the vital role of private security.

Finally, thank you to our **Focus Groups** for their expertise and inputs; to **Stefan Huber**, the Ligue's Executive Director, who envisioned this project and helped steer it to fruition; and the Ligue's Chief Content Officer, **Garett Seivold**, for research, analysis, writing, editing, and design.

digital, data-driven government service that can be an engine for innovation, sustainability, and economic inclusion. More information is available [here](#).

The U.S.-based **National Association of Security Companies** (NASCO) promotes public awareness of the vital role of private security in the U.S., shaping policy and advocating for high standards in licensing, screening, and officer training. On behalf of its members, NASCO monitors and participates in activities affecting private security companies and private security officers at the federal, state, and local level as well as activities in the employment, legal and commercial arenas. More information about NASCO is available [here](#).

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In Brief...

What have we learned?

Well, on a macro level, we've learned that global public procurement is complicated to analyze — with incomplete data, alternate definitions, differing categorizations, and disparate analytical approaches. Though it proved challenging,

we've managed to normalize fields to facilitate future global analysis and cut through the noise to answer critical questions, as in this European edition.

Questions like...

What are key features of the market for guarding services?

Contract Duration	36-month avg. in 2017 (high); 25 months in 2023
Contract Value	Excluding contracts below €140,000, the median value of guarding contracts in recent years is €730,045
Competition	Narrow range between 4.7 bidders per tender in 2013 (low) and high of 7.4 (2020)
Framework Agreements	Avg. of 18.3% since 2008, but more common recently
Supplier Profile	SMEs won 58% of contract awards in 2023
Renewal Clauses	Included in 1/3 of contracts
Lot Split	Close to even (multi- vs. single-lot contracts)
Procedure Type	Open tenders dominate (~80%)
Timeframe	70 days between publication and contract award; trend towards shorter duration
Value	There has been a doubling in the total value of guarding contracts reported to TED since 2017 to \$5.4 billion (only contracts above €140,000 are reported)

Even excluding all contracts below ~€140,000, the public procurement market for guarding services exceeds €5 billion.

How dominant is price in procurement decisions for guarding services?

85% Avg. weighting of price since 2018



Moderate decline in price weighting in last 15 years



- Refuse Collection 92%
- Cleaning Services 90%
- Guarding Services 85%**
- IT Helpdesk 70%
- Building Maintenance 70%
- Facilities Management 40%

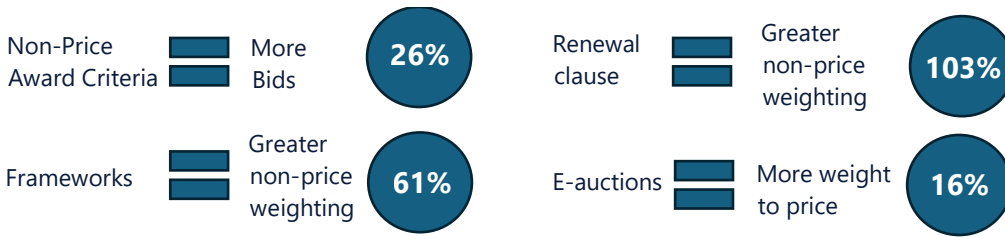
Public procurement of security services must prioritize **quality over cost**. Relying on lowest bids produces inferior service, wastes taxpayer money, and endangers the public; it also stunts industry professionalism and drives down wages and working conditions for frontline security professionals. Despite available expertise and shared best practices, low-entry barriers let corner-cutting firms win contracts when buyers focus on hourly cost alone. Public authorities should use procurement as a lever to raise standards by requiring **non-negotiable criteria** (for example, compliance with Collective Agreements) and awarding contracts based on working conditions, staff qualifications, and innovation rather than price alone.



Despite available expertise and shared best practices, low-entry barriers let corner-cutting firms win contracts when buyers focus on hourly cost alone.



What procurement processes have a positive correlation to a multi-criteria approach to contract awards? And which correlate with a low-bid approach?



What do security experts believe are true marks of quality — and how frequently are these factors considered in today’s procurement awards?

8 Quality Indicators	Illustrative Element	In Award Criteria*
Aspects shaping service quality and representing a quality-based approach to contract awards; derived from expert input	This element was not necessarily included; it is a sample element among dozens we looked for	Year: 2025
#1. Officer Skills, Training, and Professional Readiness	Training plans, curricula, or evidence of officer training	10.6%
#2. Responsible Employment Practices	Pay, benefits, or cost burdens placed on workers	7.7%
#3. Health & Safety Management and Performance	ISO 45001 or equivalent certification	5.3%
#4. Financial and Business Stability	Financial ratios, turnover thresholds, or audited accounts	0.7%
#5. Digital Maturity & Information Management	Use of digital tools for reporting, monitoring, or service delivery	5.8%
#6. Workforce Stability & Human Resources Management	Turnover, absenteeism, or retention metrics	11.8%
#7. Organizational Experience & Contracting Track Record	Sector-specific expertise or technical capability	5.1%
#8. Operational Continuity & Quality Assurance	Redundancy or backup capacity for critical operations	12.8%

*For a quality indicator to be marked present, the existence of any element at all was deemed sufficient (either the illustrative element or multiple others we looked for). For details on other elements included in indicator analysis; 2024 results; and pct. of indicators included in other tender sections, see Part 2 of the report.

What procedures do security practitioners recommend (and not) for a tender process? ...

	Clear, Complete, and Measurable Requirements	Clear working hours, shifts, and coverage
	Transparent and Objective Evaluation	Clear, weighted, and objective award criteria
	Balanced and Proportionate Contract	Mutual termination clauses
	Well-Structured Procurement Process	Pre-proposal conference or early industry engagement
	Unfair or Disproportionate Contract Conditions	Unilateral fine regimes
	Excessive Administrative Burden	Excessive or irrelevant documentation requirements
	Restrictive or Distorting Requirements	Short contract durations with no extension options



Inclusion Increased in 2025 for All 8 Quality Indicators



77% of Tenders Include None — Zero — of these 8 Quality Indicators in the Award Criteria

... and how often are some of these practices followed?

≥30 Days to Submit Documents? 10.8% Fail Rate

Awarding Criteria Clearly Defined? 16.4% Fail Rate

PART 1:

Data Overview

1. ABOUT THE DATASETS

	A	B
Tenders Analyzed	39,475	7,707
Countries Examined	All EU Member States+	All EU Member States+
Unique Buyers	11,728	4,448
Years Covered	2008-2023	2024-2025
Service Examined	Guard Services, Exclusively	Guard Services, Exclusively
Source	TED (Tenders Electronic Daily)	TED
Document Type	Contract Awards	Awards + Pre-Selection Documents, Inclusive (e.g., Contract Performance Conditions, Technical Requirements, etc.)
Analytical purpose	High-level metrics, historical trends, and correlation analysis	Granular and deep-dive analysis
Appears in	Market Overview, Price-Weighting Analysis (Parts 1-2)	Select Quality Indicators, Model Procurement Practices (Parts 3-4)
Most Represented Countries in Dataset (% of Total)	Germany (20.3%), Poland (20.2%, France (16.9%)	Germany (33%) France (13.7%) Spain 10.7%

*Figure 1

(*see Notes, Part 4)

This analysis is based on a structured review of publicly available tendering documents for security guard services across Europe. To maximize value, two data sets (with differing degrees of detail) were used to extract insights. **Only tenders explicitly related to personnel guarding services** were included; contracts for alarm monitoring, other services, or mixed service bundles were excluded to maintain a consistent scope. Only tenders with sufficient published information on award criteria or contract conditions were eligible for coding.

While the datasets provide a robust cross-section of European procurement practices, some limitations remained, as not all contracting authorities publish full documentation, and some tenders omit detailed award criteria. We examined data from **32 countries** plus 5 others that participate in EU TED procurement, representing a mix of large and small procurement markets. Tenders were drawn from a variety of procedure types — including open, restricted, and framework agreements, which influences the level of detail available in the documentation.

We examined data from 32 countries, representing a mix of large and small procurement markets.

Notes on analysis methodology for all figures are included in Part 4.

2. MARKET OVERVIEW

Public procurement is a massive market, with a global estimate of €12 trillion. The EU public procurement market is substantial on its own, about €2 trillion annually, or roughly 13–14% of the EU’s GDP.

The EU Public Procurement market has seen ongoing growth since the post-pandemic year of 2021, reaching the highest number of open tenders in 2024.

Security guard services are part of that growing market, and our review of roughly 40,000 tenders and contract awards offer insight into this critical market segment.

Data Points

Duration. Since 2008, the average security guarding contract has been 2.5 years, revealing how often authorities re-tender services and how much stability providers can expect when investing in training, technology, and workforce development.

This report focuses on quality criteria in public procurement in Europe, and how they are — or are not — being used. First, though, it’s worthwhile to gain context by understanding the broader structure of the European public procurement market.

The following high-level indicators provide a picture of how security guarding services are currently tendered, competed, and awarded across Europe. We’ve also sliced the data to paint a picture of marketplace trends and to suggest where we are headed.

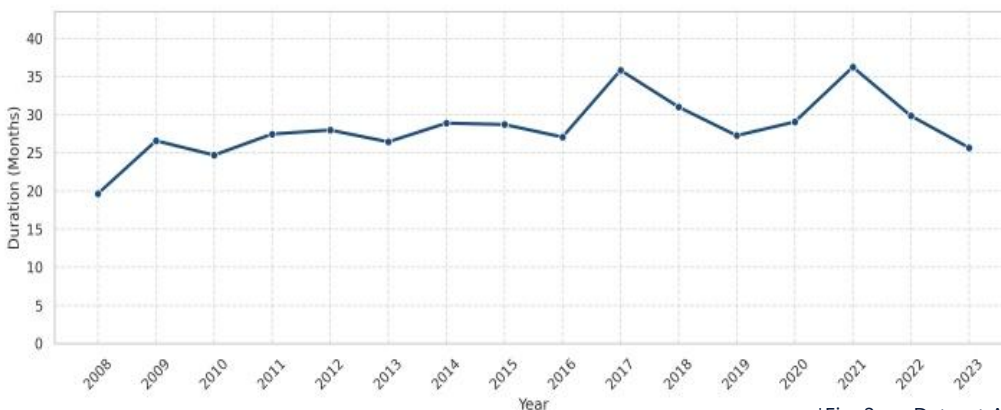
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The average duration has been fairly consistent, between 19 and 36 months since 2017. However, it’s noteworthy that 2023, the most recent year for which data is available (Dataset A), had the shortest average contract duration of any year since 2010.

Average Contract Duration by Year



*Fig. 2 Dataset A

Contract Value. Reporting on the average and median value of security guarding contracts comes with the caveat that small contract awards — generally less than €140,000 Euro — are not captured in public databases and thus not part of this analysis.

Excluding those smaller contracts, the **median value** of guarding contracts in Europe since 2017 is **€730,045**. The mean contract value is drastically higher indicating the existence outlier contracts of enormous value.

It is noteworthy that 2023, the most recent year for which data is available, had the shortest average contract duration of any year since 2010.

Competition. Since 2008, the average number of bids per security guarding contract has been steady — fluctuating in a narrow range between a high of 7.4 in 2020 and a low of 4.7 in 2013.

The value of the contract seems to modestly increase the number of bids, with a more

substantial increase in the number of bids for very large contracts.

- Less than €250,000: Average of 5.2 bids;
- €250k to €1M: Average of 5.4 bids;
- €1M to €5M: Average of 5.6 bids; and
- More than €5M: Average of 8.3 bids.

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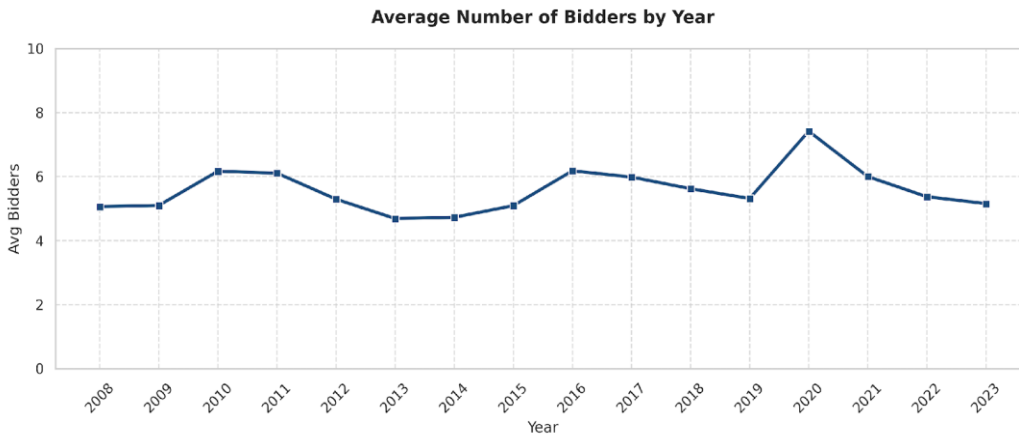


Fig. 3 Dataset A

Framework Agreements. Impacting both competition and contract continuity, the use of framework agreements in security guarding contracts has grown more common over the last 15 years, with an overall average **since 2008 of 18.3%**. More recently, however, closer to 24% of guarding contracts have utilized framework agreements.

It's especially common in Ireland, where 86% of security guarding contracts utilize frameworks. Croatia had the second highest usage rates (56.8%), followed by Denmark, where about half of guarding contract use frameworks.

A framework agreement is essentially a way for public buyers to do the hard work of

procurement once and then make use of it many times over. Instead of running a full tender every time they need a service, the authority sets up a kind of “pre-negotiated universe” of suppliers — agreeing on the rules of engagement, the pricing logic, and the quality expectations in advance. No one is guaranteed any work, but everyone on the framework is cleared to compete for it.

From a buyer’s perspective, they help streamline purchasing while maintaining competition and compliance with procurement rules. Done well, it can keep competition alive while sparing everyone the bureaucracy of always starting from scratch.

The use of framework agreements in security guarding contracts has grown more common over the last 15 years.

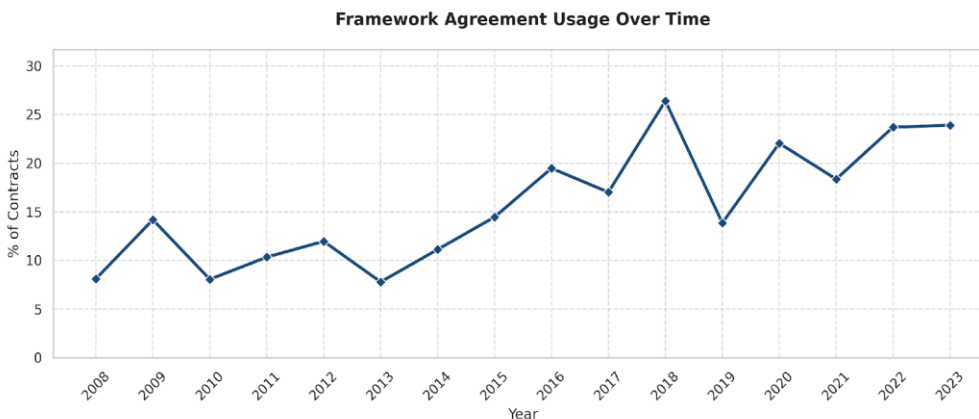


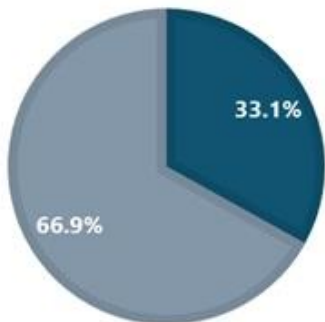
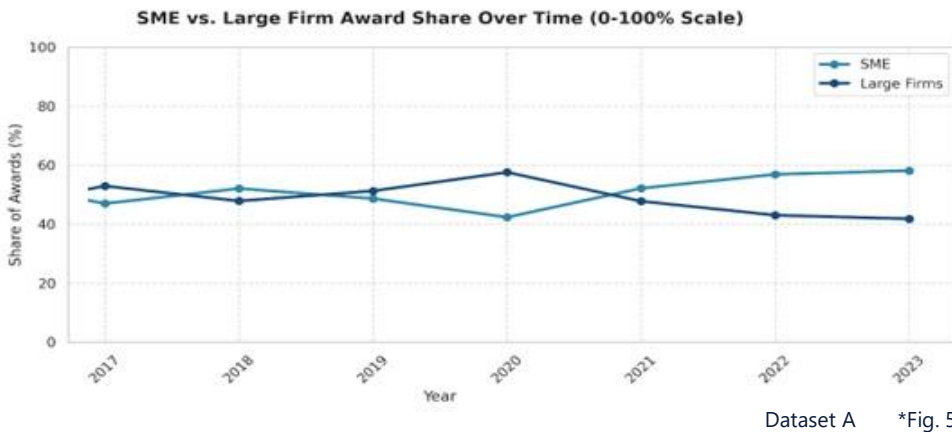
Fig. 4 Dataset A

Supplier profile. Understanding the supplier profile of a procurement market helps illuminate how contracts are distributed across different types of providers and what that suggests about market structure, competition, and accessibility. Examining the share of awards going to large firms versus small and medium-sized enterprises (SMEs) offers a simple snapshot of how diverse the supplier landscape is and how public authorities engage with the full range of available security providers.

Analysis reflects a fairly even split between contract awards going to large firms and SMEs. It has varied over the years but has stayed within a fairly narrow band, with neither segment gaining more than 60% market share in any given year since 2017. In 2023, the last year of analysis, SMEs won 58% of contract awards.

(SME status in TED is based on the supplier’s own declaration using the EU’s standard definition of small and medium-sized enterprises and is only shown when this information is reported in the notice.)

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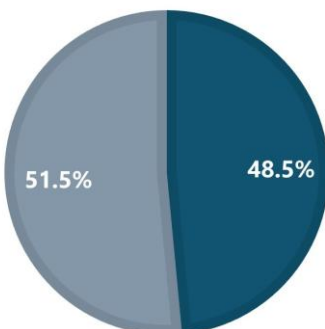


■ With Renewal Clause ■ Without Renewal Clause

Fig. 6 Dataset A

Renewal clauses. Over the course of this analysis period (2017-2023), 33.1% of contract notices included a renewal clause, indicating the potential for future re-tendering or extension.

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■ Multi-Lot Contracts ■ Single-Lot Contracts

Fig. 7 Dataset A

Multi- vs. Single-Lot Contracts. Since 2017, analysis finds a pretty even split between contracting authorities that choose to tender a guarding service as a single-lot contract — awarding the entire scope to one provider — and those that divide the requirement into multiple lots, each covering a distinct site, region, or service component.

Procedure Type. Open tenders — a fully competitive process in which any interested supplier may submit a bid — dominate public procurement for security guarding services, comprising nearly 80% of contracts in the 2017-2023 study period.

Restricted contracts refer to a two-stage process where any supplier may request to participate, but only shortlisted candidates are invited to submit full bids.

In a negotiated process the contracting authority negotiates the terms of the

contract with one or more selected suppliers before awarding it.

An “AWP” is a non-competitive award made without publishing a contract notice, typically used in narrowly defined circumstances such as extreme urgency or technical exclusivity.

“Other” is a residual category capturing less common or country-specific procedures, such as competitive dialogue, innovation partnerships, dynamic purchasing systems, or framework call-offs that do not fit the main classifications.

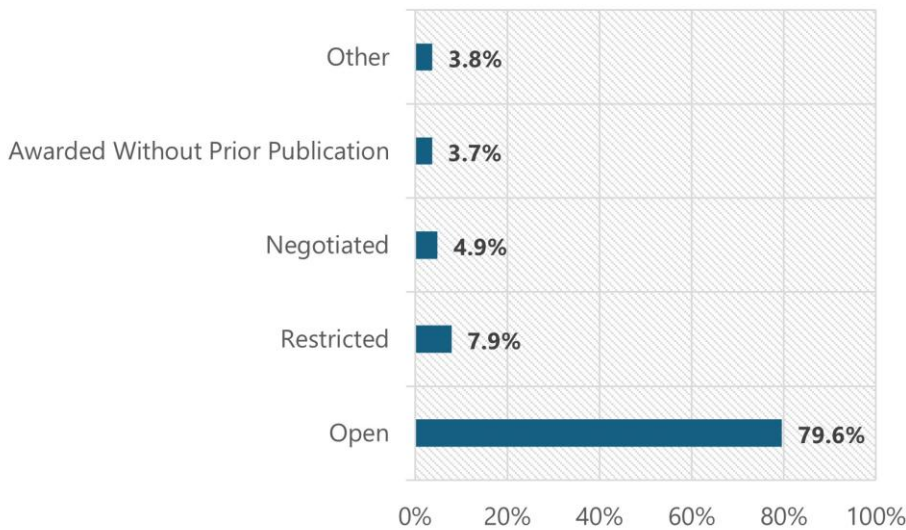


Fig. 8 Dataset A

Tender-to-Award timeframe. The average time between publication and security contract award was **82.7 days**, offering a useful indicator of how quickly public authorities progress through the procurement cycle.

This average has gradually fallen from more than 95 days in 2017 to below 70 days in 2023, a shift that may reflect increased use of digital procurement tools, more standardized documentation, or greater administrative efficiency within contracting authorities.

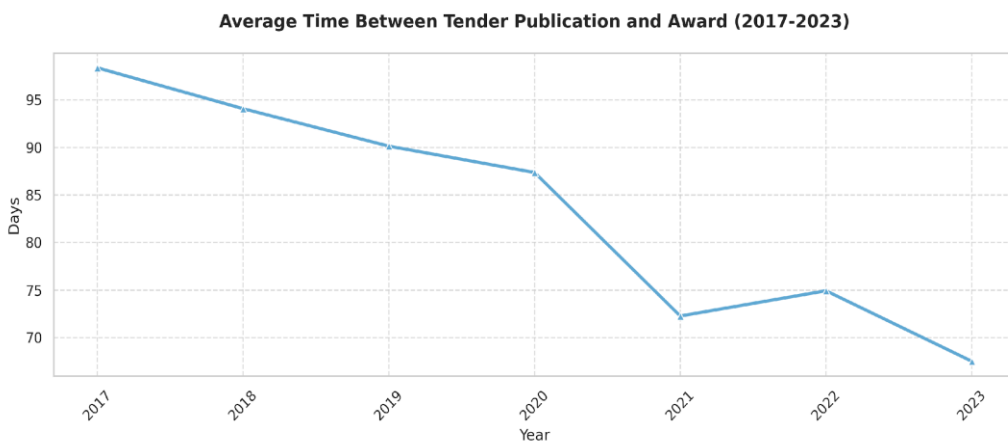


Fig. 9 Dataset A

This average has gradually fallen from more than 95 days in 2017 to below 70 days in 2023.

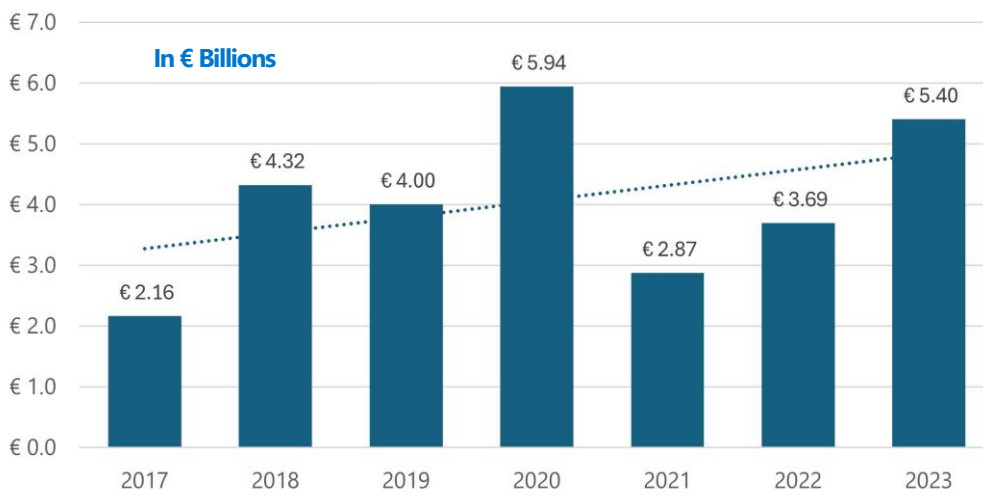
Market Size. The substantial amount of public money spent on guarding services reflects its growing importance. Even discounting small contracts, the market value was more than 5 billion in 2023 — and spending is trending upwards.

The value of guarding contracts in Europe is larger than the accompanying figure indicates, as it only comprises the total value of contracts reported to TED (Tenders Electronic Data). TED will include most large public contracts for guarding (contracts) but

many local contracts, small recurring patrol contracts, and others that fall below reporting requirements are likely excluded. Thresholds for services can vary somewhat by year but is roughly €140,000 for the years analyzed.

TED is an Official Journal supplement managed by the EU Publications Office, and while it's authoritative for what must be published at EU level, it is not a census of all public procurement activity and reports only a portion of the EU public procurement market for security guarding services.

The substantial amount of public money spent on guarding services reflects its growing importance.



*Fig. 10 Dataset A

PERSPECTIVE

Unlocking Fairer, More Transparent, Quality-Focused Public Procurement

In a world where governments spend one out of every three dollars on contracts with private companies — some \$13 trillion annually — public procurement should not be dismissed as a technical back-office, administrative chore. It's a strategic tool to buy better and deliver better services to citizens.

At the Open Contracting Partnership (OCP), we work with governments in over 50 countries to empower this transformation. We help shift procurement from paper shuffling and box ticking to a digital and data-driven public service that opens the door for innovation, sustainability, and economic inclusion.

This transformation rests on three pillars:

1. Buying for the public interest.

Procurement provides local authorities with a massive lever to shape markets. It is not about buying cheapest but buying best. This can be particularly important in security procurement: cost-cutting undermines quality and leaves critical infrastructure vulnerable. By proactively engaging with the market and understanding local dynamics, governments can stay at the forefront of technology while ensuring value for money and public safety.

2. Leveling the playing field. We need fair, competitive, and open competition to drive innovation and value. A landmark European Court of Auditors report revealed a concerning trend: competition for public contracts in the EU decreased between 2011 and 2021. A lack of transparency about potential government contracting opportunities and lots of red tape leads to low or no bids. And governments fail to plan properly and issue emergency awards or approach their own favoured cronies undermining incentives to perform or compete. If governments go out, engages businesses, listens to their ideas on how to deliver more impact before a competition is

finalised, then we see more trust and that leads to bids and competition.

3. Turning data into actionable insight.

Many public buyers currently operate with information siloed in PDFs or distributed across disconnected systems and without access to machine-readable and timely open data when they need it to make decisions. To buy more strategically, public buyers need better data on what is being bought, by whom, and for how much. To make informed decisions about the business for the job, officials need access to information about the market landscape, the ability to track vendor performance, and the ability to benchmark delivery. Our Open Contracting Data Standard helps solve that problem, unlocking and standardising contracting information and making it machine-readable across the whole cycle of planning, procuring, and delivering public contracts driving better insight and impact.

Participation is the key

How we manage public procurement directly impacts the quality of services citizens receive.

To understand what quality means, we need to engage closely with those who know it best: By listening to business associations, companies, and citizens, we can build evidence-based reforms to procurement and secure better public services. The insights highlighted in this report emerge from deep domain knowledge of how the private security sector works and what it needs to deliver at its best.

In a climate of eroding trust, reforms that set clear rules, provide transparency, and establish accountability are urgent. Public procurement has long been a black box that, at best, is seen as an administrative blocker. By turning it into a data-driven digital open book, we don't just save money; we build trust, strengthen public infrastructure, and ultimately, improve lives.



Gavin Hayman
Executive Director,
Open Contracting
Partnership

3. PRICE-WEIGHTING ANALYSIS

What should a winning bid be based on? Price is one element, certainly — it's taxpayer money after all, so being price conscious is critical. But "lowest bid" certainly shouldn't be the only award criterion. Myriad other factors determine whether public money spent on security services is money well spent.

Clearly, there needs to be a balance — in which government authorities are mindful of money but not fixated on it. Naturally, exactly what balance should be struck is highly dependent — one size does not fit all. Duration, assignment complexity, and other factors will influence it.

Industry experts participating in a Focus Group for this report were of different minds on exactly what a minimum quality weighting should be. Many leaders suggest that price, typically, should be limited to 40% of award criteria, others said they could live with awarding criteria that tilts just slightly further in the direction of price. There was uniform agreement, however, that over-reliance on price is both improvident and potentially dangerous.

What the Data Shows

Contract award data reflects widespread reliance on cost as the sole or dominant award criterion in guarding services procurement, with price carrying an 85% median weighting in recent years (meaning **half of all tenders has price weighted at above 85%** and half below).

Additionally, data show that the vast majority of tenders are not in compliance with the recommendation that price should comprise no more than 40% of award points. In 2023, 87% of tenders exceeded this limit; and, more worrisome, is that **more than half of awards assign 80% or more points to price.**

Price-Only vs. Price Dominance.

Measuring the percentage of "price-only" awards is a common procurement data point for illuminating where the balance lies. While not devoid of value, the data point does a poor job of describing real-world conditions. A contract that weights price at 99% is hardly striking a reasonable balance between price and other criteria yet falls into the same bucket as an award process with a 50-50 split.

Additionally, "price-only" percentages typically refer to the entirety of the procurement market, grouping both goods and services. This is misleading, as a reasonable weight for price in buying office furniture or similar goods is not comparable to procuring security or other vital services.

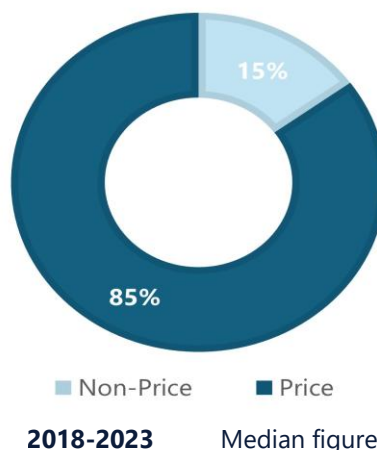
For these reasons, we've done deeper analysis, to reveal the true weight of price in guarding contracts and to compare guarding services against other services. While 'price-only' analysis identifies whether other criteria are formally present, weighting analysis reveals how much influence price actually carries in award decisions — offering a more accurate picture of procurement behavior.

“

Clearly, there needs to be a balance — in which government authorities are mindful of money but not fixated on it.

”

What weight does price have vs. all other criteria?



*Fig. 11 Dataset A

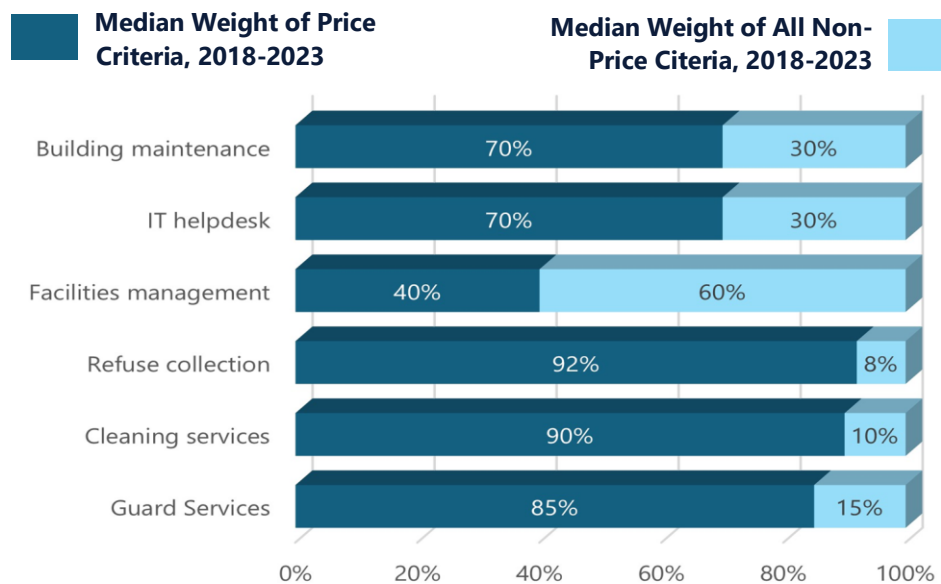
Contract award data shows widespread reliance on cost as the sole or dominant award criterion in guarding services procurement.

Cross-Sector Comparison

Comparative data of public agency tenders finds that non-price criteria hold less weight in guard services than in contracts for other — arguably less consequential — services.

While there should be a high level of concern for elements other than price in all public tenders — to ensure quality and

deliver good stewardship of taxpayer money — it is especially vital in security services where negative consequences and contract failures can pose a risk to public safety. Thus, it is troubling to see, for example, that price holds significantly more weight in awards for guarding services than in building maintenance contracts.



*Fig. 12 Dataset A

Transparency and Integrity Are Additional Areas of Concern in Guard Services

This analysis focuses on quality in procurement decisions (or lack thereof), but tenders for Guard Services also need to improve in the areas of transparency and integrity, according to data compiled by [The Government Transparency Institute](#), a non-partisan think tank that seeks to improve government accountability. Tenders for Guard Services received a “Good Procurement Score” of 54.9 in 2023, based on 10 transparency indicators and 10 integrity indicators. Scores were better for all 10 services we chose for comparison, from Recycling Services (56.2), Fumigation Services (64.3), to Pest Control Services (67.8).

Integrity risks exist at every stage of the procurement process. In the pre-tendering phase, risks include undue influence of external actors on officials’ decisions during needs assessment, and a lack of justification in the choice of procurement procedure. In the tendering phase, risks include the lack of competition or cases of collusive bidding, and conflict of interest and corruption in the evaluation process. Even the post-award phase is fraught, with risks such as a deficient separation of financial duties and/or lack of supervision of public officials.

“Public procurement is one of the government activities most vulnerable to corruption, exacerbated by the complexity of the process, the close interaction between public officials and businesses, and the multitude of stakeholders.” notes the Organisation for Economic Co-operation and Development (OECD) in their report, [Preventing Corruption in Public Procurement](#).

How does the weight of price in awards for guarding services compare to other services?

“

Public procurement is one of the government activities most vulnerable to corruption, exacerbated by the complexity of the process, the close interaction between public officials and businesses, and the multitude of stakeholders.

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Historical Analysis

The result of historical analysis is surely a case of good news, bad news.

Good that there has been a decline in the median percentage for price weight — from 100% to 80%, but it is far from “good” that price continues to be so structurally

dominant in awarding criteria in public tenders for security guarding.

Time will tell, but the data trend line also seems to suggest that we’ve hit a plateau. After falling 20 percentage points from 2014 to 2018, the median weighting of price has vacillated but has not declined.



Fig. 13 Dataset A

What weight has price carried in awarding criteria over the years?

An Important Note About “Quality”

It would seem straightforward: you judge bids for service on the basis of price; or you judge them on quality. (Or, ideally, a combination of the two.) But “quality” is a broad term subject to different interpretations around the world. Some might consider a business license a quality measure, as it does indicate some level of assessment, while others would perceive it as a mere condition for participation, and hardly a sign of “quality.” We’ve managed that discrepancy in our global data review by analyzing tenders using different parameters.

First, as seen in the preceding section, by examining the weight of price against any other award criteria at all — collectively referred to as the “non-price” or “multi-criteria” subset. In subsequent sections, we’ll analyze contracts for the existence of award criteria and pre-selection criteria that more clearly indicate a legitimate assessment of quality as it relates to security services, ones that can be used in future country and regional comparisons. We’ve identified 8 “Quality Indicators” based on input from contract specialist at major security firms (“Skills, Training, and Professional Readiness” is an example). Then, we’ve analyzed how frequently these select elements are included in public procurement for guarding services.

In both manners of analysis, we have conducted a deep dive to learn how much weight price carries in the contracting process — to learn whether “non-price criteria” or our “8 select quality indicators” are merely included, or if they are actually helping to drive procurement decisions.

By analyzing through different lenses, we hope to paint a fuller picture of the current state of public procurement for security personnel around the world (and in this GSB Pulse edition, Europe).

Correlations

Public authorities make dozens of design choices when structuring a tender, and these choices often interact in ways that shape whether quality or inclusion can take hold.

This section examines several of those relationships to understand which conditions tend to support a more balanced or inclusive approach. We look at whether renewal clauses or framework agreements are associated with stronger multi-criteria considerations, and whether the use of e-auctions corresponds with a shift toward price-only evaluation.

We also explore how clarity and weighting influence market response — testing whether clear quality criteria, higher inclusion weights, or more balanced scoring attract more bidders or support greater bidder diversity.

Together, these correlations help illuminate the practical levers that can strengthen procurement outcomes and encourage more capable, competitive, and resilient participation in the guarding services market.

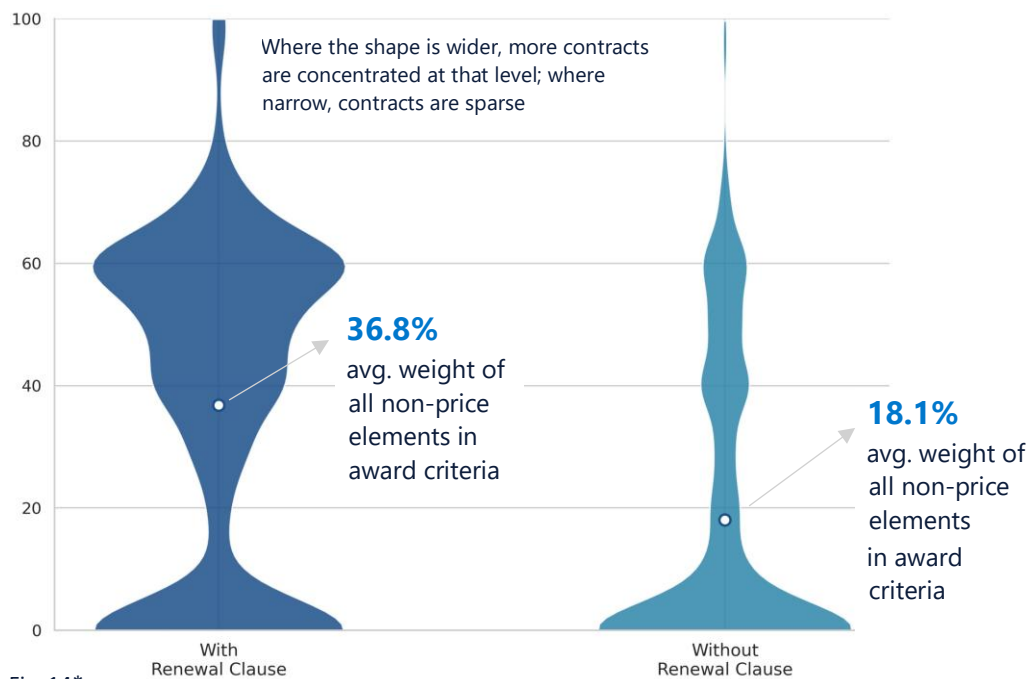


Fig. 14*
Dataset A

Renewal Clauses. Renewal clauses are strongly associated with multi-criteria-based procurement, with non-price criteria carrying twice the weight on average when present. The difference in the median is even greater: **40 percentage points** (confirmed with extremely high statistical significance ($p < 0.001$)).

That buyers who plan for contract renewal are far more likely to evaluate suppliers on

non-price criteria makes sense, as long-term relationships require quality assurance, and that expectation is built into the award criteria from the start.

However, the risk to public safety from price-only procurement is the same regardless of the duration of a security relationship. Short-term contracts also require attention to quality to minimize risks to public safety.

Do contracts with a renewal clause tend to allocate a higher proportion of the evaluation score to non-price criteria?

Yes — strongly.

Framework Agreements. Analysis reveals a strong correlation between the use of frameworks and greater consideration of elements other than price.

When the procurement process utilizes framework agreements (a standing arrangement with pre-qualified suppliers), a greater share of the evaluation score is likely to be allocated to non-price factors compared to one-off open tenders.

Analysis was conducted on 5,501 contracts with a framework agreement and 24,353 without. The median non-price weight is 40 percentage points higher in contracts utilizing frameworks, slightly more than the difference noted in analysis of the overall average (37% vs. 20%). This supports the narrative that structured, longer-term procurement arrangements tend to move beyond pure price competition.

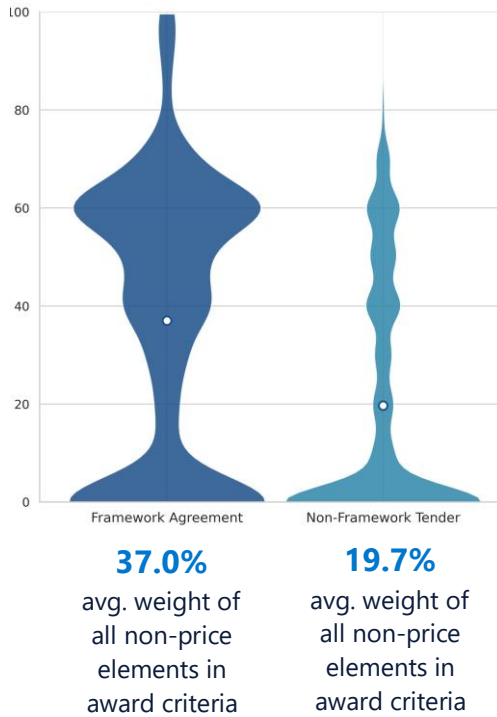


Fig. 15 Dataset A

Do framework agreements correlate with a more inclusive (non-price) approach?

Yes — strongly.

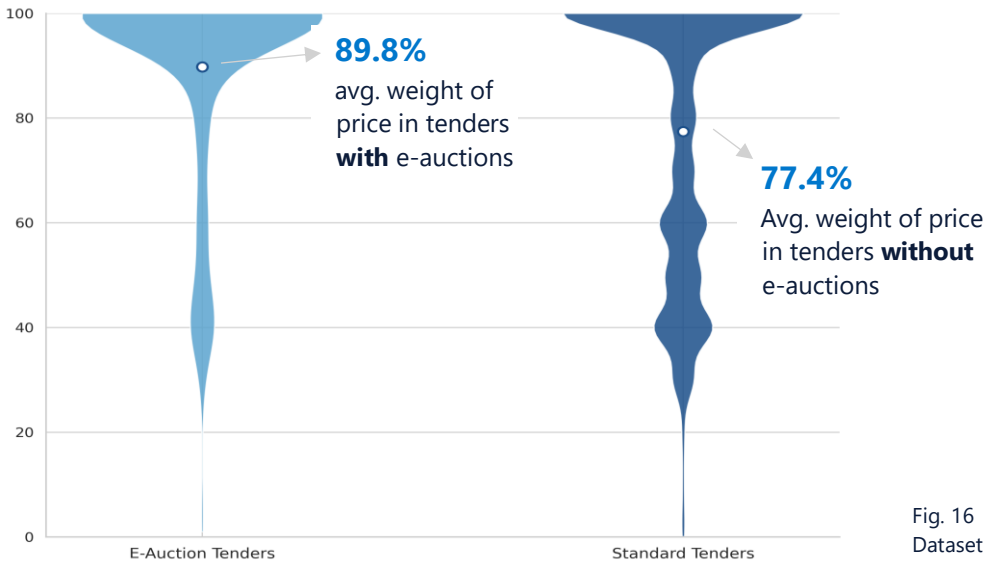


Fig. 16 Dataset A

Do e-auctions correlate with a less inclusive — more “price-driven” — approach?

Yes, clearly.

Electronic Auctions. Electronic auctions — often called e-auctions — are digital bidding processes in which shortlisted suppliers compete in real time by lowering their prices in response to one another. They are designed to drive competition and reduce costs, but they also tend to narrow the focus of evaluation: because the auction stage typically revolves around price alone, other quality-related factors play a much smaller role once the auction begins.

In our analysis of European guarding tenders, this dynamic is clearly visible. **Contracts that use e-auctions are far more likely to rely on “price-only” award criteria**, reinforcing a procurement approach that prioritizes the lowest bid rather than the overall value of service. This association is important for understanding how procurement tools can unintentionally shape outcomes in a labor-intensive, quality-sensitive sector like security.

Bid count. Another important correlation concerns the relationship between award criteria and supplier participation. **Public authorities that use multi-criteria evaluation — rather than relying on price alone — consistently attract more bidders.** In our sample of European guarding tenders, multi-criteria procedures received an average of 6.51 bids, compared with 4.99 bids for price-only awards. This suggests that when contracting authorities signal that quality, professionalism, and

service standards will meaningfully influence the outcome, more suppliers are willing to invest the time and resources to compete. In other words, a quality-based approach is not only better aligned with the nature of guarding services; it also broadens competition and strengthens the overall procurement process.

Additionally, **SMEs participate at the same rate in both types of procurement (with a similar win rate).**

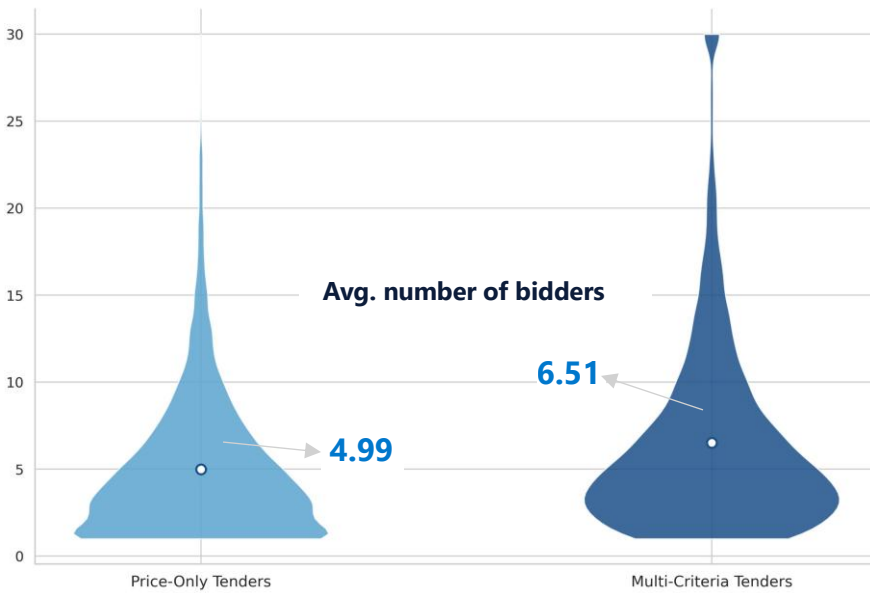


Fig. 17
Dataset A

Does a more inclusive approach to awarding criteria help to attract more bidders?

Yes, by 26.4%.

PERSPECTIVE

Lose-Lose Dynamic is Alive and Well in Security Services Procurement

In public procurement of security services, quality — not cheapest price — should be the primary criterion. Unfortunately, data shows this is not currently the case. And everyone loses.

Public agencies lose, the consequence of inferior service, which is reflected in research showing that when organizations allow cost to be the primary factor in choosing a contractor, they often regret it.

The public loses. Receiving substandard performance is not a good use of taxpayer money and, more importantly, it puts the public at risk. Private security is a mission critical function where real harm can result if it's the subject of bargain hunting.

The industry loses, because when organizations driven by a “low-bid mentality” purchase security on the cheap, they stymie growth of professionalism in the industry and hinder progression toward a more mature marketplace.

And security professionals lose. Price-focused procurement de-values security work and encourages a race-to-the-bottom in all aspects, including wages and working conditions.

The very mission of governments — to empower workers and alleviate poverty — is severely undercut when they are price focused. It catalyzes substandard wages and penalizes the very companies that are committed to the goals that governments advocate.

Building A Win-Win Future

Substantial improvement in the contract security industry in the last decade does not diminish the need for public authorities and municipalities to be deliberate when selecting a security firm.

Expertise and operational excellence are available but not assured. The barriers to marketplace entry are set too low to expect anything else.

There will always be security companies that try to cut corners. The bigger problem, however, one that continues to hold the industry back in its pursuit of greater professionalism, is that such companies still win contracts, including with public entities.

The free market is supposed to push security vendors to compete on excellence, but that only holds true if the marketplace bothers to take the time and effort to evaluate it.

For years, the industry has freely shared best practices and procurement tools to drive up quality and improve industry wages (like the Ligue’s [Checklist for Building an Effective Security Partnership](#)), but **persistent industry prodding often goes ignored by public entities that instead gamble with public safety** when they focus on one thing: cost-per-hour.

Price is an important consideration — but should not be determinative — in security procurement. Public entities should commit to only contracting with security firms that meet certain non-negotiable criteria, for example full compliance with Collective Agreements, and go further by building security partnerships around quality rather than cost — by establishing quality awarding criteria related to working conditions, staff qualifications, innovation, and other critical elements.

Public procurement provides public authorities with a key lever of influence to improve market conditions.

They need to use it.



Garrett Seivold
Chief Content Officer,
International Security
Ligue

“

The free market is supposed to push security vendors to compete on excellence, but that only holds true if the marketplace bothers to take the time and effort to evaluate it.

”

PART 2:

Select Quality Indicators

Results reflect dangerous oversights in public procurement of guarding services in Europe. Training programs of bidders are rarely examined; health and safety records even less so. The financial stability of security firms seems to be of middling concern, and a bidder's commitment to continuous improvement an afterthought.

The results are troubling and may actually understate the problem — the realities of data analysis require setting the bar pretty low. We could not judge, for example, how rigorous a public agency's review of a bidder's training program was (or wasn't), only that the tender documents indicate any mention of training whatsoever. Moreover, **we searched for multiple markers within each indicator; if any at all were present, then the quality indicator was recorded as present.** As such, readers should understand that the results paint today's procurement practices in their most favorable light. The reality is likely far grimmer than the numbers here suggest.

But there is reason to be hopeful for a more quality-centric future. Analysis shows that while consideration of quality elements is too low, it's growing.

Quality Categories

As explained earlier, "quality" often means different things to different people, which is why we have endeavored to slice the data in multiple ways. What follows here is data analysis on 8 elements that are both important to contract success and clearly indicate a quality-inclusive approach to public procurement. This is not a complete

list — public procurement for security services can (and should) consider more elements than are listed here — but these aspects of security service offer a useful illustration of the types of information that a thoughtful procurement process would be wise to include.

These indicators — such as the competence of frontline officers, the fairness of employment practices, and financial resilience — serve as proxies for the broader concept of quality. By analyzing their presence in published tenders, we assessed the extent to which contracting authorities incorporate quality-related criteria into their procurement processes.

And we looked for evidence everywhere, both specifically **in the "award criteria" and also "in any tender section,"** that included pre-qualification criteria, contract performance conditions, technical specifications, service descriptions, tender instructions, and all sections where quality requirements might appear.

Public buyers selecting a security partner are making a decision that directly affects safety, continuity of operations, and public trust. **Together, these 8 indicators reflect an ecosystem of factors that shape service quality** — from how officers are trained and supported to how the bidding firm manages risk, technology, and long-term performance.

Return on investment (ROI)

By examining tenders through this lens, public authorities gain a clearer picture of whether bidders are equipped to deliver excellence, manage crises, and sustain service standards over time.

“

The results are troubling and may actually understate the problem — the realities of data analysis require setting the bar pretty low.

”

QUALITY INDICATOR #1

Officer Skills, Training, and Professional Readiness

Many security firms have rigorous, even impressive training programs, but regulatory minimums are generally set too low to rely upon.

'Hours of training completed' also fails to provide a full picture, as training methods and specific course instruction significantly impact the performance of officers. A contracted officer who arrives at a facility may or may not have passed a written exam before deployment, for example, or may or may not have had training in safety awareness, or crowd control, or any other number of subjects critical to a specific assignment.

Although it depends on the complexity of the assignment, reviewing the training practices of bidding firms should often be a

detailed endeavour. There is frequently a vast difference between security firms on their ability to meet specific or specialized training requirements.

"Just like technology, the human element of security — which relates to decision making, common sense, and awareness — must be upgraded," according to security consultant Amotz Brandes of the Chameleon Group Inc. "And this can only be accomplished through education, training, and drilling of personnel."

ROI

The quality of security service a public agency receives ultimately hinges on the skills and readiness of the personnel assigned to it.

“

Just like technology, the human element of security — which relates to decision making, common sense, and awareness — must be upgraded. And this can only be accomplished through education, training, and drilling of personnel.

”

What the data shows

Although it's central to satisfactory service, vendor training programs go unexamined, according to analysis.

It is uncommon for skills, training, and professional readiness to be addressed in procurement documents, and it is especially rare as a specific award criterion.

As an example, **just 1.4% of tenders** identify requirements for "refresher," "update" or "continuous" training as part of award criteria.

Evaluates ANY of the following:

- ✓ Training plans, curricula, or evidence of officer training
- ✓ Refresher or ongoing training
- ✓ Specific training hours or qualifications
- ✓ Officer competency or training outcomes
- ✓ Training-related KPIs or contract performance conditions

In Any Tender Section

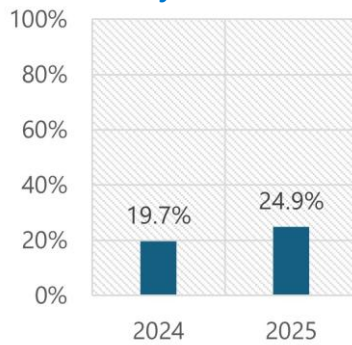


Fig. 18
Dataset B

In Award Criteria

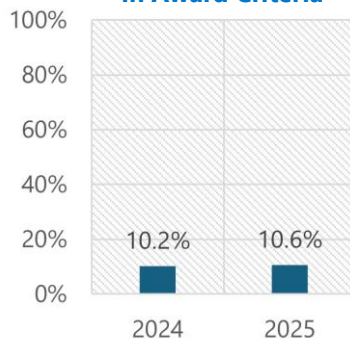


Fig. 19
Dataset B

Does the tender evaluate the bidder's training systems, curriculum, or officer competency — not merely requiring legal minimums?

QUALITY INDICATOR #2

Responsible Employment Practices

Quality in security service delivery is inseparable from the conditions under which security officers work.

Unlike many other contracted services, security work relies on a dispersed, largely unsupervised workforce performing safety-critical tasks in environments that can involve conflict, isolation, and elevated risk. Public agencies must therefore look beyond price and technical specifications; and judge bidders on factors what will shape performance, stability, and professionalism.

We looked across a broad spectrum of workforce-related criteria that are widely recognized as indicators of responsible employment — from predictable scheduling practices, limits on excessive overtime, compliance with collective bargaining

agreements, and whether officers are expected to bear costs for uniforms, equipment, or travel time. Additional indicators include pay differentials for night work or high-risk posts, requirements for diversity and inclusion policies, and provisions for auditing payroll and benefit payments to prevent underpayment or non-compliance. These factors shape the working environment officers experience every day.

ROI

For contracting authorities, considering this indicator helps ensure that the people delivering the service are treated fairly and supported appropriately, which ultimately strengthens service reliability, public confidence and, critically, public security and resilience.

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These factors shape the working environment officers experience every day.

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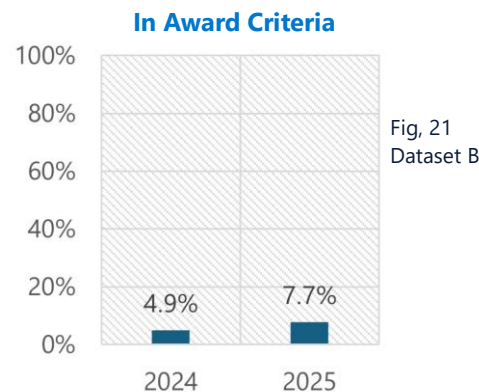
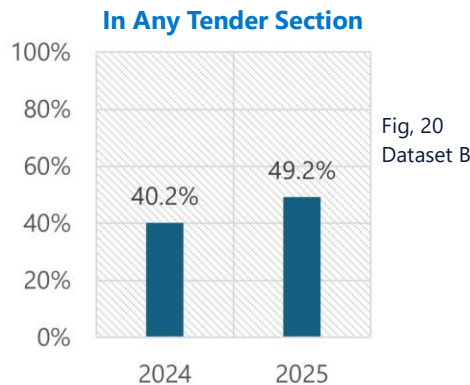
What the data shows

Though improving, fewer than half of all public tenders include any stipulations regarding workforce conditions or employment standards as part of the procurement process, with **a mere 8%** making it part of awarding criteria.

Fewer than 1% of tenders include any mention at all of sick pay or paid leave policies, for example; 8% address payroll auditing; and 36% include language related to labor law compliance.

Evaluates ANY of the following:

- ✓ Contract types or employment stability
- ✓ Scheduling, overtime, or working-time compliance
- ✓ Collective agreements or labor-law compliance
- ✓ Pay, benefits, or cost burdens placed on workers
- ✓ Worker protections, grievance systems, or anti-harassment measures
- ✓ Equality, diversity, and inclusion commitments
- ✓ Payroll auditing or social-compliance



Does the tender evaluate whether the bidder upholds fair, lawful, and responsible employment conditions for its workforce?

QUALITY INDICATOR #3

Health & Safety Management and Performance

Failing to consider health and safety exposes authorities to preventable accidents, liability claims, and operational disruptions.

A provider with weak safety practices may lack proper training, fail to investigate incidents, or overlook hazards that compromise officer wellbeing. Conversely, bidders with strong safety management systems demonstrate proactive risk mitigation, transparent reporting, and continuous improvement.

Security officers frequently operate in environments where risks are inherent — from managing public interactions to

responding to emergencies. This indicator examines whether tenders evaluate a bidder’s health and safety policies, risk assessments, incident reporting systems, and track record of safety performance. It reflects the authority’s responsibility to ensure that officers, clients, and the public are protected through robust safety governance.

ROI

Authorities that prioritize this indicator benefit from fewer incidents, stronger compliance, and a safer service environment overall.



A provider with weak safety practices may lack proper training, fail to investigate incidents, or overlook hazards that compromise officer wellbeing.



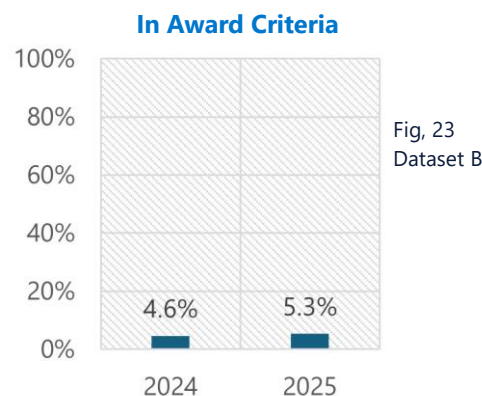
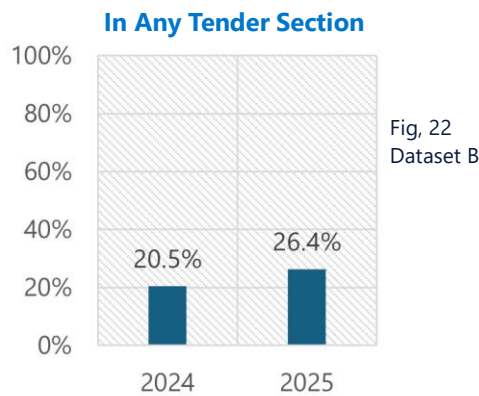
What the data shows

In 2025, roughly 1-in-4 public tenders for security guarding services made any mention of bidders’ safety and health program or track record, an increase over 2024 by roughly 6%. Only **5.3% address an aspect of health and safety in the awarding criteria.**

Specific elements of safety and health are not frequently mentioned. For example, fewer than 8% of tenders make mention of fatigue management, such as requirements for rest breaks or limiting shift length; and **less than 1%** address aspects related to mental health, including stress management or incident de-briefing or counseling. “Safety policies” appear somewhere in 8.3% of tenders.

Evaluates ANY of the following:

- ✓ Submission of a safety policy or safety management plan
- ✓ Safety performance or incident history
- ✓ ISO 45001 or equivalent certification
- ✓ Scores bidders on safety training, risk management, or safety governance
- ✓ Safety-related KPIs or contract performance conditions



Does the tender evaluate a bidder’s H&S systems, policies, or performance?

QUALITY INDICATOR #4

Financial & Business Stability

A guarding contract is only as reliable as the company delivering it.

This indicator assesses whether tenders evaluate a bidder’s financial health, insurance coverage, claims history, and overall business stability. These elements help determine whether the provider can sustain operations, absorb shocks, and meet contractual obligations over the full term of the agreement.

Overlooking financial stability can lead to mid-contract failures, service interruptions,

or emergency re-procurements — all of which carry significant cost and risk.

A company with weak financial footing may struggle to pay staff, maintain equipment, or respond to unforeseen events. In contrast, bidders with strong financial foundations, adequate insurance, and sound governance offer greater reliability and resilience.

ROI

Considering this indicator helps authorities avoid supplier failure and ensures continuity of service throughout the contract lifecycle.



Overlooking financial stability can lead to mid-contract failures, service interruptions, or emergency re-procurements — all of which carry significant cost and risk.



What the data shows

In 2025, only 24% of procurements suggested any review of bidders’ financial stability and economic standing, but the figure marks a substantial increase over 2024.

While addressed in pre-selection criteria in 13% of tenders, issues related to financial health are **almost never part of specified award criteria**.

In looking at more specific elements, analysis found that **8.9%** of all procurements for guarding services consider or address **bidders’ history of litigation** at some point.

Evaluates ANY of the following:

- ✓ Financial ratios, turnover thresholds, or audited accounts
- ✓ Insurance requirements beyond basic statutory minimums
- ✓ Claims/litigation history or financial risk exposure
- ✓ Business continuity or financial resilience planning
- ✓ Legal/financial declarations tied to bidder stability

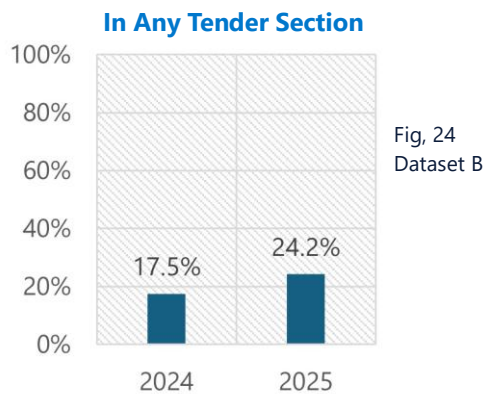


Fig. 24 Dataset B

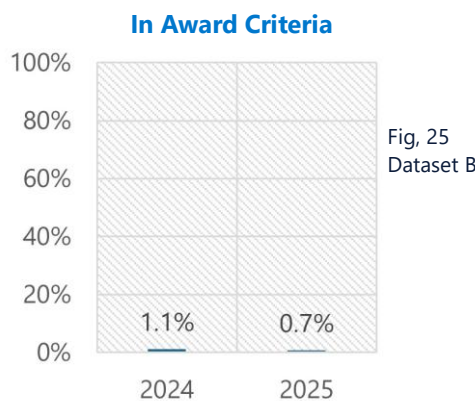


Fig. 25 Dataset B

Does the tender evaluate whether the bidder is financially sound, properly insured, and capable of sustaining service delivery over the contract term?

QUALITY INDICATOR #5

Digital Maturity & Information Management

Modern guarding services increasingly rely on digital tools for reporting, monitoring, communication, and data sharing.

This indicator examines whether tenders assess a bidder’s technology infrastructure, digital reporting capabilities, information security practices, and ability to share data efficiently with the contracting authority.

Ignoring digital maturity can leave authorities with outdated, paper-based processes that hinder visibility and slow incident response. A provider lacking digital tools may struggle to deliver real-time updates, maintain audit trails, or integrate with client systems. Conversely, bidders with strong digital capabilities offer

enhanced situational awareness, automated reporting, and secure data flows.

To assess whether contracting authorities prioritize digital maturity, we examined tender documents for criteria that reward bidders who use technology to enhance service delivery, transparency, and operational efficiency. This includes both explicit references to digital systems and indirect indicators such as electronic reporting, cloud-based compliance tools, and real-time monitoring platforms.

ROI

Authorities that consider this indicator benefit from improved accountability, faster decision-making, and a more modern, efficient service.



Bidders with strong digital capabilities offer enhanced situational awareness, automated reporting, and secure data flows.



What the data shows

Roughly 24% of public tenders for guarding services examined at least a single aspect of bidders’ technological sophistication. With digital capabilities growing in importance to security services, it’s not surprising it is growing as an element within contract award criteria. “Real-time reporting,” as an example, is mentioned in 3% of security tenders today, analysis found.

Evaluates ANY of the following:

- ✓ Use of digital tools for reporting, monitoring, or service delivery
- ✓ Requirements for real-time or electronic data sharing
- ✓ Digital dashboards or client access to live information
- ✓ Information security standards (e.g., ISO 27001)
- ✓ Integration or interoperability with client systems
- ✓ Digital audit trails or automated reporting mechanisms

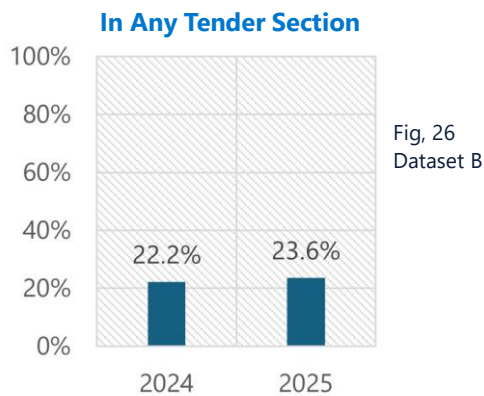


Fig. 26 Dataset B

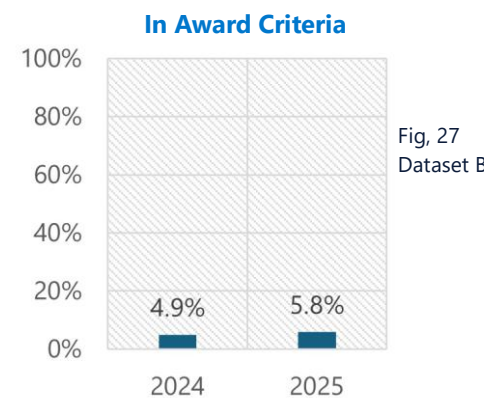


Fig. 27 Dataset B

Does the tender evaluate whether the bidder uses modern digital tools, systems, and processes to enhance service delivery, transparency, and data sharing?

QUALITY INDICATOR #6

Workforce Stability & Human Resources Management

Failing to assess workforce stability can result in high churn, inconsistent staffing, and officers who are unfamiliar with the site or its risks. This undermines service quality and increases the burden on the contracting authority.

A stable, well-managed workforce is essential for consistent service delivery. Bidders with strong HR management practices invest in retention, maintain robust vetting processes, and plan for continuity on long-term contracts.

This indicator evaluates whether tenders consider a bidder’s HR practices, including turnover and absenteeism rates, reliance on temporary staff, recruitment and vetting standards, and plans for continuity of

personnel. Analysis shows, for example, if public authorities consider a bidder’s plan for covering absences, its long-term personnel assignment plan, and for indications that the firm’s management has strategized how to minimize rotation of staff.

These factors determine whether the provider can maintain a reliable, properly vetted team over time.

ROI

Authorities that prioritize this indicator gain a more consistent, knowledgeable workforce and reduced operational disruption.



Bidders with strong HR management practices invest in retention, maintain robust vetting processes, and plan for continuity on long-term contracts.



What the data shows

The security industry in Europe is facing a critical labor and skills shortage, a fact that seems to be reflected in the data. It would appear public agencies are looking for greater assurance that security firms will be able to deliver the people necessary to fulfill contract obligations. Indeed, of the 8 quality indicators, **“workforce stability” is the quality indicator most frequently included in award criteria**, at close to 12%.

Evaluates ANY of the following:

- ✓ Turnover, absenteeism, or retention metrics
- ✓ Reliance on temporary vs. permanent staff
- ✓ Recruitment, vetting, or screening standards
- ✓ Plans for continuity of personnel
- ✓ Workforce planning or HR management capacity
- ✓ Incentives or programs to promote staff loyalty

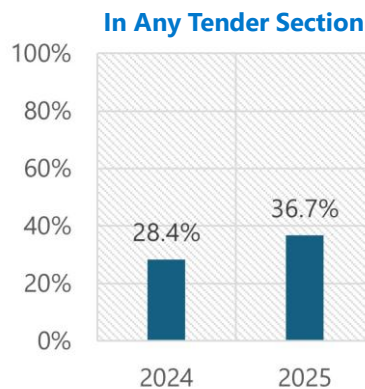


Fig. 28 Dataset B

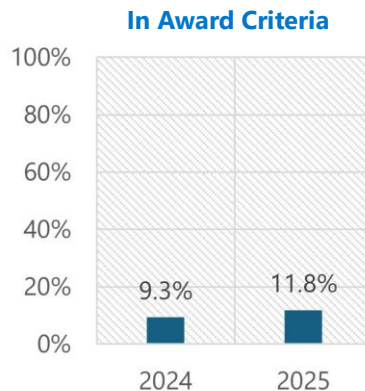


Fig. 29 Dataset B

Does the tender evaluate whether the bidder can provide a stable, reliable, properly vetted workforce capable of meeting contract requirements over time?

QUALITY INDICATOR #7

Organizational Experience & Contracting Track Record

Do public authorities take care to ensure that a prospective security partner has successfully delivered comparable work and possesses the expertise, credibility, and organizational maturity to do it again?

Past performance is one of the strongest predictors of future success. This indicator examines whether tenders evaluate a bidder’s experience delivering similar contracts, sector-specific expertise, client references, and evidence of successful performance. It helps determine whether the provider has the capability and maturity to manage the scale and complexity of the assignment.

Ignoring experience can lead to selecting a bidder that lacks the operational depth or sector knowledge required, increasing the risk of service failures or prolonged onboarding challenges. Conversely, bidders with a strong track record bring proven systems, established processes, and lessons learned from comparable work.

ROI

Authorities that consider this indicator benefit from greater confidence in the provider’s ability to deliver reliably from the outset.



Past performance is one of the strongest predictors of future success.



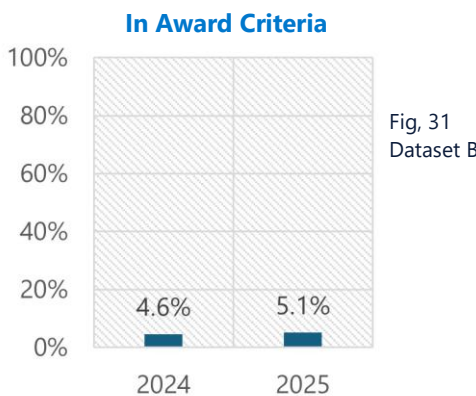
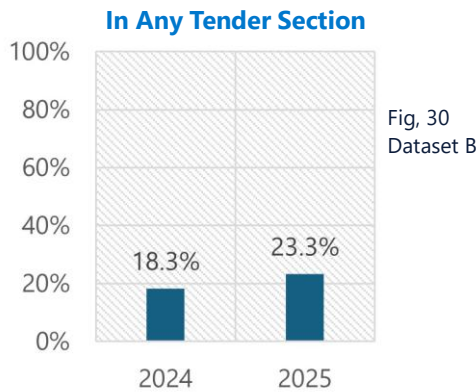
What the data shows

If 2025 is an indication, public agencies in Europe are growing more concerned with the experience and track record of the security firms with which they contract; close to **1-in-4 tenders now take into consideration some aspect of past performance**.

“References,” as an example, were specifically cited in 6% of tenders for guarding services in 2025 (in any section).

Evaluates ANY of the following:

- ✓ Experience delivering similar contracts
- ✓ Sector-specific expertise or technical capability
- ✓ Past performance evidence or KPIs from previous contracts
- ✓ Client references or reference projects
- ✓ Industry awards, certifications, or association memberships
- ✓ Any requirement to demonstrate “fit” based on track record



Does the tender evaluate whether the bidder has successfully delivered similar assignments and possesses the expertise and credibility required for the contract?

QUALITY INDICATOR #8

Operational Continuity & Quality Assurance

Long-term guarding contracts require providers that can maintain consistent service, manage crises, and continuously improve performance.

This indicator assesses whether tenders evaluate a bidder’s quality assurance systems, business continuity plans, crisis management capability, redundancy in critical operations, and performance monitoring frameworks.

Failing to consider these elements can leave authorities vulnerable to service disruptions, poor incident response, or declining

performance over time. A provider without strong continuity planning may struggle during emergencies or fail to uphold quality standards. In contrast, bidders with robust quality governance and resilience planning demonstrate the ability to sustain operations under pressure and drive continuous improvement.

ROI

Authorities that prioritize this indicator gain greater reliability, stronger oversight, and a more resilient service throughout the contract term.



Bidders with robust quality governance and resilience planning demonstrate the ability to sustain operations under pressure and drive continuous improvement.



What the data shows

Roughly 25% of tenders in 2025 evaluated some aspect of operational continuity, with close to 13% addressing it within the award criteria. Both figures represent solid improvement over 2024 procurements. More specifically, Quality Auditing is part of 12.8% of tenders; **continuous improvement plans are mentioned in very few tenders (1.8%)**.

Identifying appropriate KPIs is important to ensure expectations for security service are clearly defined, allowing a security firm to understand the standards by which its performance will be appraised.

Evaluates ANY of the following:

- ✓ Quality assurance systems or internal compliance programs
- ✓ Business continuity, operational resilience, or crisis management plans
- ✓ Redundancy or backup capacity for critical operations
- ✓ Performance monitoring, KPI tracking, or continuous improvement processes
- ✓ Ability to operate and maintain contract-related systems or equipment
- ✓ Documented procedures for maintaining or improving service quality

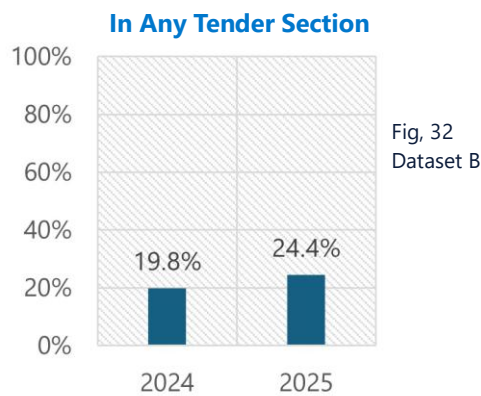


Fig. 32 Dataset B

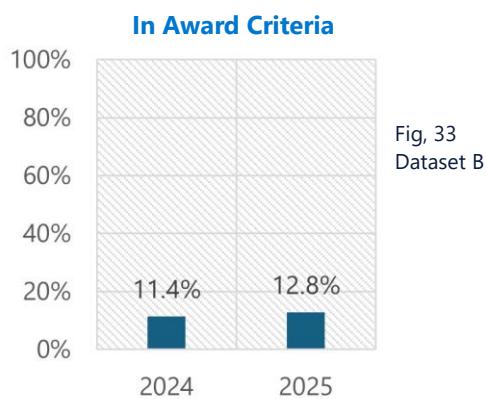


Fig. 33 Dataset B

Does the tender evaluate whether the bidder has the systems, plans, and governance needed to ensure consistent, high-quality service delivery and continuous improvement throughout the contract?

QUALITY INDICATORS AS A GROUP

Do Tenders Capture Enough of What Quality Requires?

The 8 quality indicators were specifically chosen because they describe what experts and our focus group believe are critical foundational elements to service excellence. By examining them collectively, a clearer picture emerges of whether tenders are structured to reward providers capable of

delivering safe, consistent, and high-performing security services.

The more quality elements that public authorities consider, the better positioned they are to select partners who can manage risk, support their workforce, and sustain performance over time.

What the data shows

As noted, government authorities in Europe are now considering the 8 quality indicators more frequently — a positive sign of progress. But digging deeper reveals a troubling truth. While they may be a more

frequent element of consideration, most tenders, in their entirety, address only 2 or fewer of these elements, and zero is by far the norm with respect to the 8 elements in awarding criteria.



The more quality elements that public authorities consider, the better positioned they are to select partners who can manage risk, support their workforce, and sustain performance over time.



Fig. 34
Dataset B

Number of the 8 Quality Indicators Considered

In Award Criteria

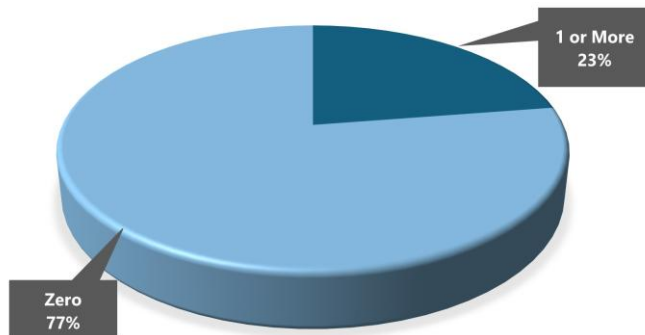


Fig. 35
Dataset B

How Many Quality Indicators Do Contracts Include?

Most typically, it's none at all.

PERSPECTIVE

From Price to Quality: Three Decades of Advancing Public Procurement in Security

The quality of public procurement in security services remains a central concern for security companies and their associations, with a history stretching back nearly three decades. In the late 1990s, it was revealed through empirical research that 90% of public contracts were awarded purely on pricing.

A milestone occurred at the 2nd European Security Conference in Berlin (June 1999): introduction of the "best bidder" concept. This initiative strengthened social partnership and underscored the sector's advancement depends on quality-driven, transparent procurement, particularly from governmental bodies. Earning the trust of public and private clients, as well as policymakers and the public, requires rigorous standards in awarding contracts.

The best bidder concept establishes verifiable quality criteria, affording contracting authorities' discretion in weighing quality against price. Its principles — transparency, simplified processes, fair competition, and adherence to legal and collective bargaining requirements — underpin responsible procurement.

The quality of public procurement has grown more important. Governments increasingly outsource responsibilities and services to private security firms, such as airport screening and security for public spaces, heightening the need for rigorous procurement standards to ensure that contracts are awarded fairly and that service providers meet performance expectations. Ensuring high-quality procurement helps prevent corruption, guarantees transparency, and promotes competition, essential when private entities play a larger role in delivering public services.

Legislation is vital but insufficient on its own; robust strategies and professional oversight are essential to avoid compliance gaps. Procurement authorities must pursue

higher professional standards through training and unified application of guidelines.

Collaboration of state security authorities with industry associations is also crucial. They possess expertise and data that governmental bodies may lack, and they are motivated to improve the performance and reliability of private security providers. Yet data protection and compliance concerns can limit information sharing.

The International Security Lige's analysis of 40,000 procurement decisions across Europe shows meaningful movement away from price-driven awards toward quality and sustainability. But we are not at the end of the path to more quality in public procurement.

However, **the value of associations is often underestimated in political and administrative circles**, with misconceptions about lobbying persisting in media and public debate. Industry associations are fundamental to fair competition, and their contributions benefit employees and the wider security sector.

A final aspect involves the balance between harmonization and fragmentation among EU members. While internal security largely falls under national jurisdiction, issues of competition and public procurement are managed by the EU Commission.

The complexity of security challenges grows worldwide. The role of private providers will expand, making improvements in procurement essential for capable companies and the broader interests of European security. Ongoing evaluation and adaptation of legal frameworks — enhanced by the active involvement of industry associations — will ensure practical, effective, and adaptable security solutions for the future.



Prof. Dr. Harald Olschok

Honorary Professor in the field of security industry, Berlin School of Economics and Law Department of Police and Security Management

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Procurement authorities must pursue higher professional standards through training and unified application of guidelines.

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PART 3

Model Procurement Practices

If you asked security firms what they want to see in a procurement process, what would they say?

Foremost, they want to be judged on a level playing field where quality makes a difference, according to a **focus group we convened of senior procurement and contract-management professionals** from leading security firms across Europe (and some in the U.S., for a wider perspective).

Responses made it clear: they want to compete on quality and believe price-only awards do a disservice to everyone. “We want balanced award criteria, where quality, experience, and operational capability have a meaningful weight alongside price,” noted one focus group participant.

The sentiment was echoed by many experts, pleading for an end to “overreliance on price,” “an unrealistic price focus,” and “contracts based on the lowest-bid principle.” Gains have been made in this regard, but contracts that lean too heavily on price still comprise a majority share of contracts, as noted in Part 1 of this issue.

Instead, firms want agencies to review aspects that speak to the level of service a firm can deliver — the specific elements of which are captured within the 8 Quality Indicators in Part 2.

But what about contract elements unrelated to Bidder Qualification? What elements make for a fair and efficient contracting process?

Public authorities play a decisive role in shaping the quality and reliability of guarding services—not only through what they evaluate about bidders, but through how they design and manage the procurement process itself.

Insights from our Focus Group, which reflects the industry’s collective experience with thousands of tenders, highlight procedural factors that they believe influence fairness, competition, and long-term contract success.

An effective process is important, helping authorities attract capable, committed partners, and avoiding unnecessary risk, confusion, or inefficiency. Good procurement practices — such as clear specifications, transparent evaluation methods, realistic timelines, and balanced contract terms — set the foundation for strong performance. Poor practices, by contrast, can distort competition, undermine service continuity, and increase the likelihood of disputes or contract failure.

While many of these elements are too subjective for data analysis, we’ve extracted several that can be reviewed statistically to see whether bidders’ recommendations are reflected in government tenders for guarding services.

We also take a look at select procedural elements to analyze for correlations with contract awards that are more quality-based.

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Public authorities play a decisive role in shaping the quality and reliability of guarding services — not only through what they evaluate about bidders, but through how they design and manage the procurement process itself.

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1. Recommended Practices

Security Firm contract specialists identified procurement practices that help create clarity, fairness, and operational stability in guarding contracts.

These elements strengthen competition, improve bid quality, and support effective contract delivery when incorporated into tender design.

Practice	Why It Matters	
Clear and detailed scope of services	Provides bidders with a shared understanding of tasks, risks, and expectations, improving bid accuracy and comparability.	Clear, Complete, and Measurable Requirements
Defined service levels and KPIs ¹	Establishes measurable performance expectations that support accountability and effective contract management.	
Clear working hours, shifts, and coverage	Reduces ambiguity and prevents misalignment between operational needs and proposed staffing.	
Complete service and capability specifications	Ensures bidders can demonstrate relevant capacity and design appropriate service solutions.	
Clear, weighted, and objective award criteria	Enhances transparency and fairness by showing how bids will be assessed.	Transparent and Objective Evaluation
Defined evaluation methodology	Ensures consistent scoring and reduces the risk of disputes or challenges.	
Clear basis of award (e.g., MEAT ² , best value)	Helps bidders tailor proposals appropriately and improves alignment with procurement goals.	
Reasonable contract duration with renewal options	Supports workforce stability, investment in personnel, and operational continuity.	Balanced and Proportionate Contract
Reasonable payment terms	Improves contractor cash flow and reduces financial risk premiums.	
Mutual termination clauses	Provides fair exit mechanisms and reduces long-term exposure for both parties.	
Proportionate risk allocation and insurance requirements	Avoids unnecessary cost inflation and barriers to participation.	
Fair and realistic bid timelines	Allows bidders to prepare thoughtful, compliant proposals, improving competition and quality.	Well-Structured Procurement Process
Opportunities for clarification and dialogue	Reduces misunderstandings and supports more accurate, tailored bids.	
Pre-proposal conference or early industry engagement	Improves specification quality and feasibility through early market input.	
Standardized price templates ³ and cost breakdowns	Enhances comparability, supports cost realism analysis, and reduces administrative burden.	

¹ **KPIs** (Key Performance Indicators): Measurable performance targets used to assess whether the contractor is delivering the service as required.

² **MEAT** (Most Economically Advantageous Tender): An evaluation method that awards the contract based on a combination of price and quality factors.

³ **Price Templates**: Standardized forms provided by the contracting authority that specify how bidders must present and break down their pricing.

2. Practices to Avoid

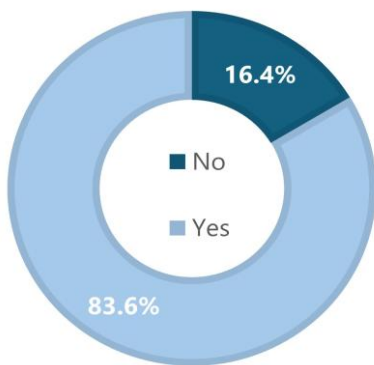
Focus-group participants also identified several procurement practices that can unintentionally hinder competition, increase operational risk, or reduce the quality-of-service delivery. These issues typically arise from unclear requirements,

disproportionate conditions, or procedural constraints that make it difficult for bidders to prepare accurate, high-quality proposals. The following are elements they believe public authorities should avoid when designing tenders for guarding services.

Practice	Why It Matters	
Unilateral fine regimes ¹	Creates unpredictable financial exposure and enables arbitrary enforcement, discouraging participation.	Unfair or Disproportionate Contract Conditions
Disproportionate penalties or risk transfer	Inflates pricing and reduces competition by shifting excessive liability to providers.	
Insurance requirements not aligned with scope	Imposes unnecessary costs and may exclude qualified bidders.	
Excessive or irrelevant documentation requirements	Increases bid preparation costs and can deter participation, especially from SMEs.	Excessive Administrative Burden
Excessive key-personnel or staffing-model requirements	Limits flexibility and adds administrative burden without improving service quality.	
Past-performance questionnaires when standardized systems exist	Creates unnecessary duplication and administrative burden for bidders.	
Short contract durations with no extension options	Creates instability and discourages investment in personnel, training, and technology.	Restrictive or Distorting Requirements
Small-business set-asides that limit teaming flexibility	Restricts the use of partner past performance and may exclude capable providers.	

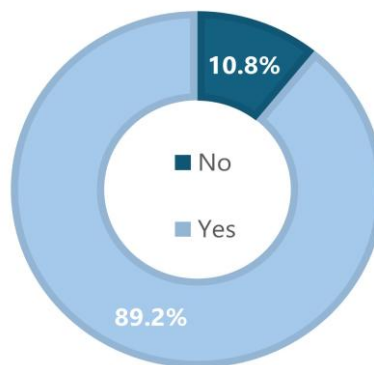
¹A unilateral fine/penalty regime allows the contracting authority to impose financial penalties entirely at its own discretion, without, for example, clear definitions of what constitutes a breach or an opportunity for the provider to remedy the issue.

3. Recommended Practices Analysis



Is Awarding Criteria Clearly Defined?

Fig, 36 Dataset B



Are Bidders Given At Least 30 Days to Submit Documents?

Fig, 37 Dataset B

Do public tenders align with bidders' basic needs?

We selected two recommended practices for analysis. The answer?

Not always.

PERSPECTIVE

What the Evidence Shows — and What Comes Next

For many years, discussions about procurement quality relied on fragmented information, isolated examples, and national debates. What was missing was a broader, data-based perspective across countries and regions to understand the true role of price in contract awards and to look for evidence that progress is being made and procurement systems can evolve.

Starting with global analysis, we soon realized the need to narrow our focus. Data formats differ significantly across jurisdictions, definitions vary, and many datasets are not designed for sector-specific analysis or easy machine reading. For this reason, we began by concentrating on Europe, supported by the global analytical expertise and structured methodology of [Open Contracting Partnership](#).

Even within one region, analyzing a large number of procurement records proved challenging. Public procurement data is fragmented, and extracting meaningful insights required persistence, methodological refinement, and collaboration across the global private security community.

The results confirm something many practitioners had long suspected: **price remains structurally dominant in guarding contracts**, even in procurement systems that formally encourage quality-based awards. Mentioning quality in principle and measuring it as a meaningful award criterion are two very different things.

How contracts are designed, evaluated, and awarded influences workforce stability, professional standards, operational resilience, and ultimately the level of security delivered to citizens. Procurement decisions therefore shape the environment in which security professionals operate every day.

For this reason, a key question raised by this research, which goes beyond how heavily price is weighted, is whether procurement systems and the project teams implementing them are equipped to define, evaluate, and manage quality consistently in a service as critical as security.

This GSB Pulse issue is intended as a contribution to that broader discussion.

It does not claim to provide all the answers. Rather, it offers a structured view of current procurement practices across countries and markets when observed at scale, and it establishes a foundation for future geographic comparisons.

Just as important as what we have learned is what comes next.

One immediate step is to extend a similar analytical approach to the United States. As in Europe, the scope of insight will depend on the availability, amount, and quality of procurement data.

Over time, **we hope this work supports both industry participants and public authorities** — particularly the teams responsible for designing public tenders — when they seek to give greater weight to quality in procurement decisions. More broadly, we hope it contributes to a constructive dialogue on how procurement systems can evolve to better reflect the growing security challenges faced by society.

Ultimately, the goal of this project is not simply to analyze procurement data. It is to support progress toward procurement systems that reward professionalism, strengthen responsible employers, support the security workforce, and deliver better outcomes for society.



Stefan Huber

Executive Director,
International Security
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Mentioning quality in principle and measuring it as a meaningful award criterion are two very different things.

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PERSPECTIVE

European Insights, U.S. Expectations: What American Data Could Reveal

The GSB Pulse “Public Procurement of Security Services (Europe)” presents findings that resonate strongly from a U.S. vantage point. Its central proposition — that public authorities are better served when security contracts are awarded based on a combination of qualitative factors and price rather than lowest cost alone — reflects a principle already embedded in U.S. procurement law. The trickier question is whether that authority is consistently exercised in practice.

At the federal level, the Federal Acquisition Regulation authorizes “best value” tradeoff processes that permit agencies to weigh technical merit, management capability, staffing plans, training standards, and past performance alongside price. Most states and local governments similarly provide discretion to evaluate factors beyond cost. Thus, unlike European procurement regimes that historically emphasized lowest-price criteria, U.S. public procurement statutes generally authorize awards based on a broader best-value framework rather than mandating price-only selection.

Yet structure and practice do not always align.

From an industry perspective, a persistent concern is that while solicitations may be labeled “best value,” price frequently exerts outsized influence on the outcome. Evaluation criteria may assign weight to training, supervision ratios, technology integration, or past performance, yet contracting officials often gravitate toward the lowest defensible price.

This tendency is understandable. Public officials operate under budget constraints, political oversight, and the risk of bid protests. Price is comparatively straightforward to justify. Qualitative judgments require documentation, procurement expertise, and institutional confidence in evaluation methodology.

Procurement officials also do not always account for the labor-intensive nature of security services, where officer recruitment, training, supervision, licensing compliance, and retention are central drivers of performance. In this environment, compensation levels and staffing structures are not secondary cost inputs — they are performance variables. When procurement structures drive price down without considering whether wages and staffing levels are sufficient to recruit and retain qualified officers, service quality predictably suffers.

The GSB Pulse findings provide a strong analytical foundation for a study of U.S. procurement data, and several patterns may emerge.

First, decentralization will matter. Unlike the European Union’s directive-based procurement framework, the United States operates a fragmented system spanning federal, state, municipal, and special-district authorities. **Procurement sophistication varies considerably.** Some agencies use performance-based contracts and detailed evaluation methods, while others lack the resources or training for effective qualitative assessment.

Second, implementation gaps may surface. Although U.S. law permits qualitative tradeoffs, contracting officers do not uniformly apply rigorous technical evaluation or price realism analysis in fixed-price service contracts. Where qualitative factors are underweighted, competition shifts toward cost compression rather than performance differentiation.

Third, oversight capacity may prove decisive. Even well-structured solicitations require disciplined contract administration after award. **Without monitoring mechanisms, measurable performance standards, and enforceable compliance provisions, procurement reform produces limited practical effect.**



Steve Amitay
Executive Director,
NASCO

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From an industry perspective, a persistent concern is that while solicitations may be labeled “best value,” price frequently exerts outsized influence on the outcome.

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PART 4

Methodological Notes

Fig. 1. Both datasets used in this report are drawn from the same public source: Tenders Electronic Daily (TED), the official journal for European public procurement notices. They differ in the type of document analyzed and the time period covered: Dataset A (39,475 records, 2008–2023) consists of Contract Award Notices (CANs) — the official announcements published after a contract has been awarded; Dataset B (7,707 records, 2024–2025) consists of full tender documentation packages — including contract notices, pre-selection criteria, technical specifications, contract performance conditions, and award criteria descriptions. Both datasets cover guard services exclusively, identified through EU Common Procurement Vocabulary (CPV) codes in the 79710000–79715000 range.

The datasets span 32 countries in total: the 27 EU member states plus 5 non-EU countries that participate in EU TED procurement — the UK (included for 2017–2020, prior to and overlapping with Brexit), Norway and Iceland (EEA members), Switzerland (bilateral agreements), and North Macedonia (EU candidate country).

Fig. 2-10. Each figure in this section was produced by directly aggregating the structured fields published in each contract award notice — no modelling or estimation was involved. For example, average contract duration (Fig. 2) was calculated from the reported start and end dates; average number of bidders (Fig. 3) from the reported number of offers received; framework agreement usage (Fig. 4) from the framework agreement indicator field; and so on for each metric. Each record is assigned to its publication year as recorded in TED. Results are presented as yearly averages or percentages, computed by grouping all records published in the same calendar year.

Fig. 5. Supplier classification of an SME is based on a simple self-declaration made by the company when the contract notice or award notice is published. TED follows the European Union’s standard definition of an SME. The European Union defines small and medium-sized enterprises using three size bands based on employees and financial limits. A micro-enterprise has fewer than ten employees and either turnover or a balance-sheet total below two million euros. A small enterprise has fewer than fifty employees and turnover or a balance-sheet total below ten million euros. A medium-sized enterprise has fewer than two hundred fifty employees and turnover below fifty million euros or a balance-sheet total below forty-three million euros. Any company that exceeds these limits is considered a large enterprise. The official definition is available [here](#).

Fig. 10. TED publishes all contract values in euros, using a standardized field (VALUE_EURO). No currency conversion was required on our side — the figures reflect the values as recorded by the contracting authorities and converted to euros by TED at the time of publication. The chart shows the total awarded value per year, summing all contracts that reported a positive value. Only contracts above the EU reporting threshold (approximately €140,000) appear in TED, so smaller contracts are not captured in this data.

Figs. 11-13. Price-weighting analysis. Source: Dataset A (Contract Award Notices from TED). Contract award notices report criteria in many different formats — some as simple numbers (e.g., “price: 60%”), others as free-text descriptions in over 20 European languages. To make

meaningful comparisons, all criteria needed to be converted into a consistent format. This was accomplished through a three-stage approach featuring structured extraction, AI-assisted classification, and a quality assurance pass. A record was included in the price weighting analysis only if at least one price-related criterion could be identified with a valid numeric weight. Approximately 75.6% of all records (29,854 of 39,475) met this standard; the remainder were excluded due to missing, illegible, or invalid weight information.

“Price weight” refers to the sum of all price-category criteria weights as a percentage of the total evaluation score. “Non-price weight” is simply 100% minus the price weight. Figure 10 presents the median values for 2018–2023; Figure 12 shows the year-by-year trend for both mean and median price weight from 2007 to 2023.

Fig. 12. Additional sector-specific datasets were constructed from the same TED source. Each sector was identified using the EU Common Procurement Vocabulary (CPV) codes listed below: Guard Services (79713000); Cleaning Services (90910000); Refuse Collection (90511000); Facilities Management (799931000); IT Helpdesk/Support (72253000); and Building Maintenance (50700000). Each sector database was built by selecting all TED records whose listed CPV code begins with the sector’s code shown above. The same three-stage classification approach described for Figures 11–13 was then applied to each sector to determine price weights.

Figs. 14-17. Correlations. Source: Dataset A (Contract Award Notices from TED). These figures examine whether specific procurement design choices are associated with different levels of price or quality weighting, or with different levels of competition. Each figure compares two groups of contracts.

Fig. 18-35. Select Quality Indicators. Source: Dataset B (full tender documentation packages from TED, 2024–2025). Eight indicators of service quality were defined in consultation with industry experts. Each reflects a factor considered important for successful contract delivery in security services.

The analysis of these indicators followed a different approach from the price weighting classification used for Figures 10–12. Rather than extracting numeric weights, the goal here was to determine whether each tender addresses each quality indicator — a presence-or-absence question. The process had two main steps: section extraction and indicator detection resulting in a simple yes-or-no finding for each indicator in each section — not a numeric score or weight.

Results are reported at two levels: “In Any Tender Section” (whether the indicator appears anywhere in the published tender documentation; and “In Award Criteria” (whether it is specifically included as a scored element of the bid evaluation). This distinction matters because a requirement mentioned only in pre-qualification conditions has less influence on the final award decision than one that directly affects the evaluation score. Results are presented separately for 2024 and 2025 to show whether inclusion of these quality elements is trending upward.

Figures 35 and 36 show how many of the eight indicators are addressed collectively, illustrating the overall breadth of quality consideration in current procurement practice.

Figs. 37-38. These two figures assess whether published tenders follow two procedural elements widely considered best practice by industry professionals:

— Award Criteria Clearly Defined (fig. 37). Whether the tender clearly states the award criteria and their relative weights or evaluation methodology, enabling bidders to understand how proposals will be assessed.

— Adequate Bid Submission Window (≥ 30 days) (fig. 38). Whether bidders were given at least 30 days between the publication of the tender notice and the deadline for submitting proposals (a timeframe widely regarded as the minimum needed to prepare a thoughtful, compliant bid).

The analysis was performed across the full set of Dataset B tenders to produce the percentages shown.

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