

WEBINAR

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# How to compete when procurement feels rigged

Bringing £300bn+ and 80,000+ contracts within reach



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The single platform to grow your public sector revenue

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# Aims of the session

- ✓ Explore why buyer access, incumbency, poor feedback, framework routes and SME friction still make public sector growth harder than it should be.
- ✓ See where suppliers are growing, where the market is uneven, and why headline spend does not always translate into accessible opportunity.
- ✓ Leave with a simple qualification model built around buyer fit, opportunity fit, route fit and winnability.

# Agenda

- **Context & Methodology**  
The market opportunity and who we heard from
- **Section 1: The state of play**  
Growth is there, but unevenly distributed and hard to forecast
- **Section 2: The wall before the door**  
Buyer access, incumbency and feedback are still holding suppliers back
- **Section 3: Winners compete differently**  
Pursuit decisions, win rates and where losses are really shaped
- **Section 4: The 2027 playbook**  
What needs to change and where to focus when planning ahead
- **Q&A**

# Spend is growing, but buyer access has not kept up

- Spend is growing, access is not
- Pipeline confidence remains too low
- Opportunity and access still diverge

## UK public sector procurement spend



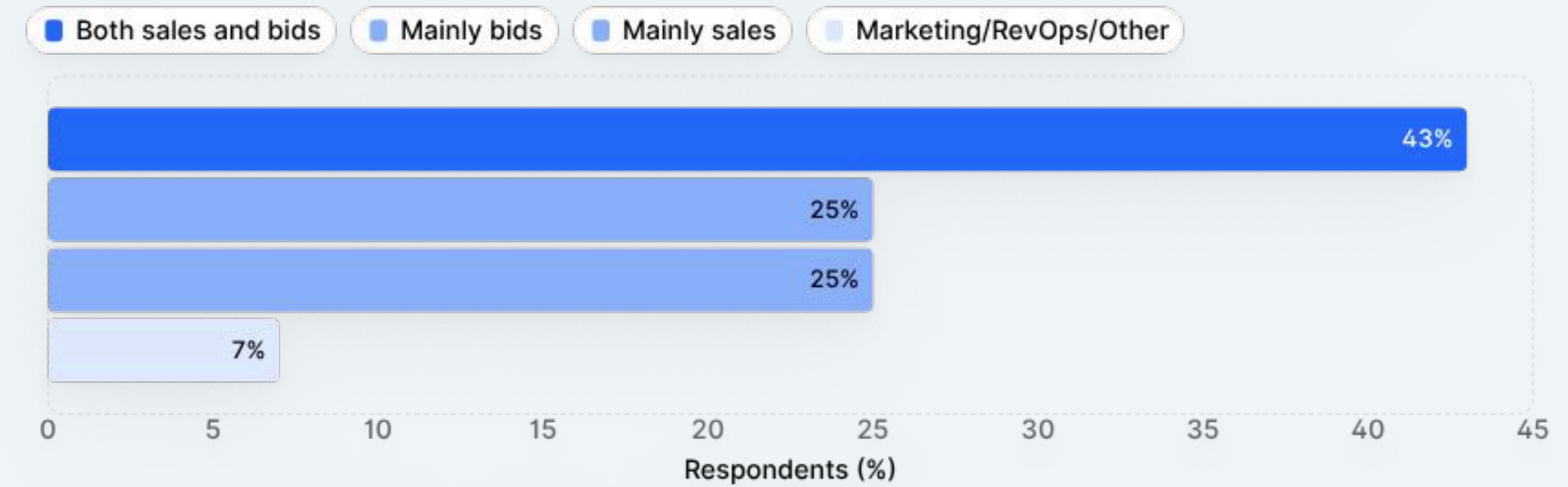
### Sources:

1. 2014/15-2023/24 figures from HM Treasury Whole of Government Accounts focus on the private sector spend
2. 2024/25 figure is the reported gross spending on public sector procurement from HM Treasury's Public Expenditure Statistical Analysis 2025, and includes all public sector spend and includes private and public entities

# Who we heard from

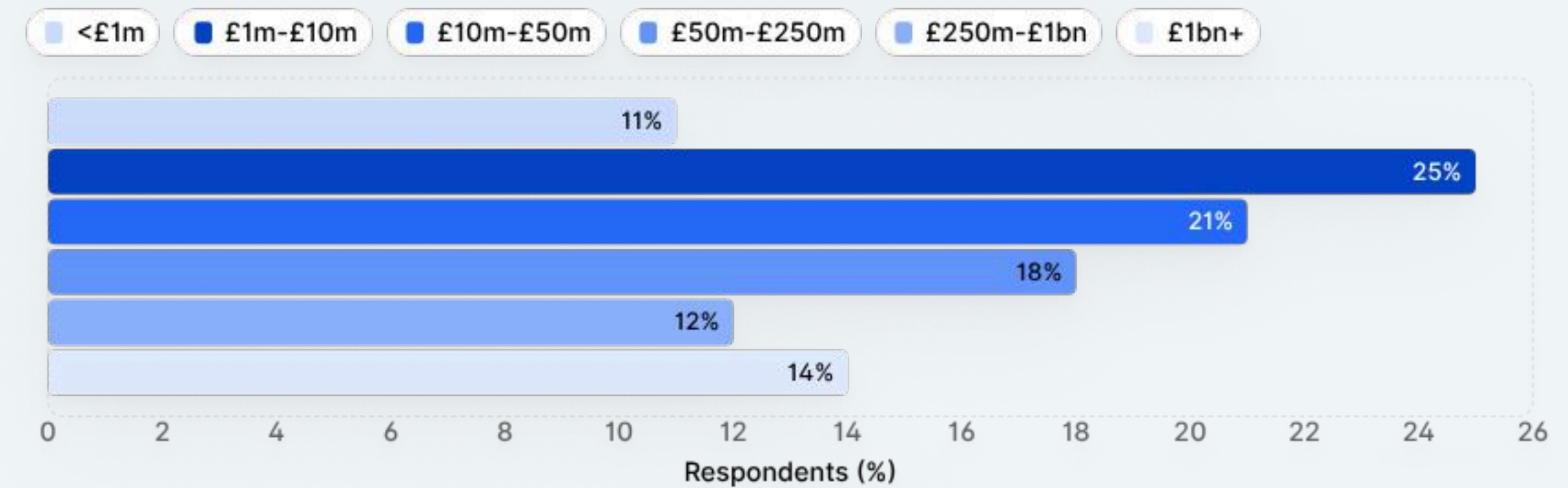
- 200+ suppliers surveyed in April 2026
- Experienced, mostly UK-based respondent group
- Strong technology supplier representation throughout

## Respondent profile (by commercial role focus)



Source: Stotles' UK Public Sector Supplier Benchmark 2026

## Company size (by reported revenue)



Source: Stotles' UK Public Sector Supplier Benchmark 2026

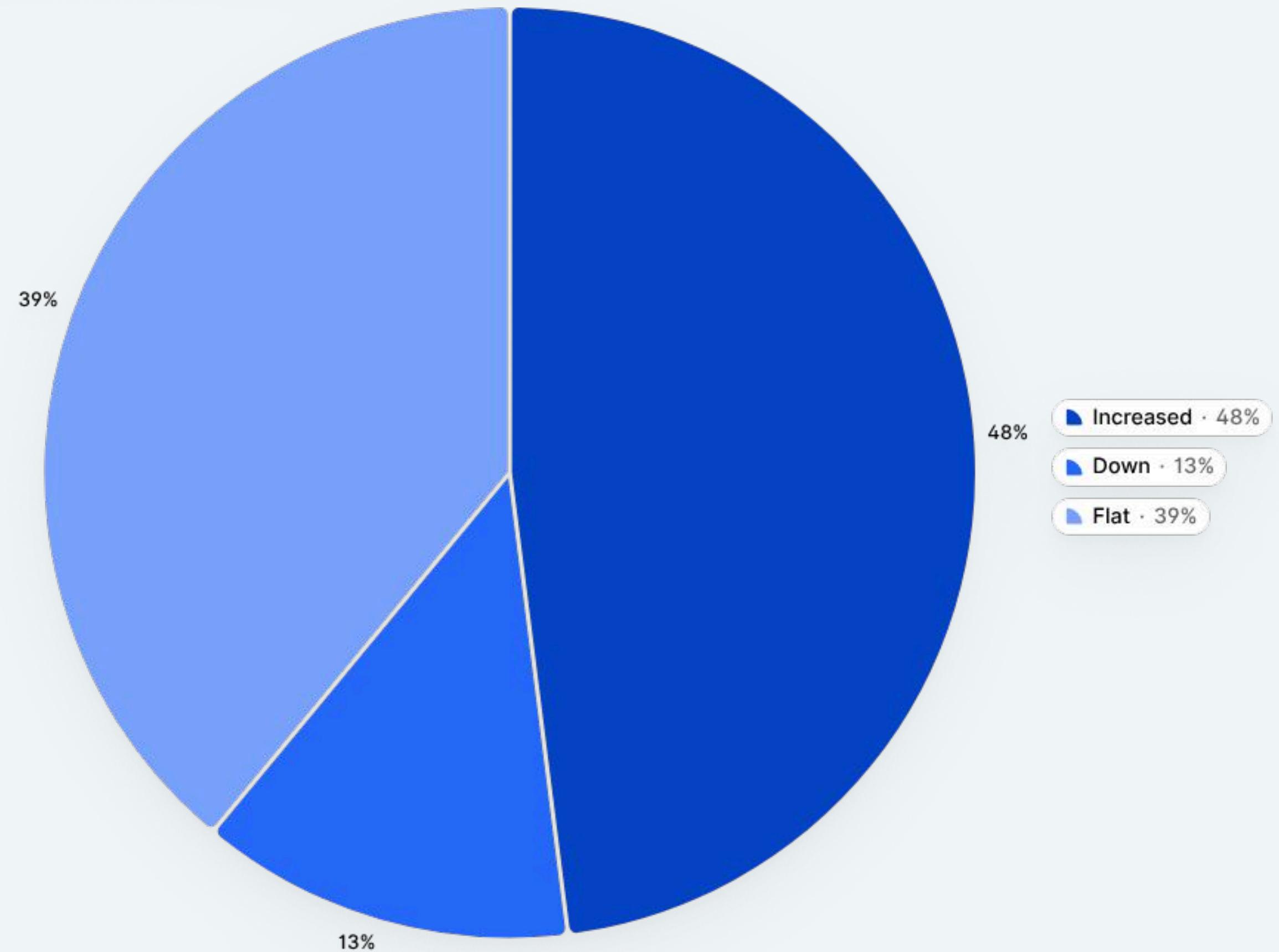
# 01.

## The state of play

# Half the market is not growing

- Growth is real, but uneven
- Declines hit SMEs and mid-market hardest
- Smaller suppliers face tougher access

## Compared with 2024, how did your UK public sector revenue change in 2025?

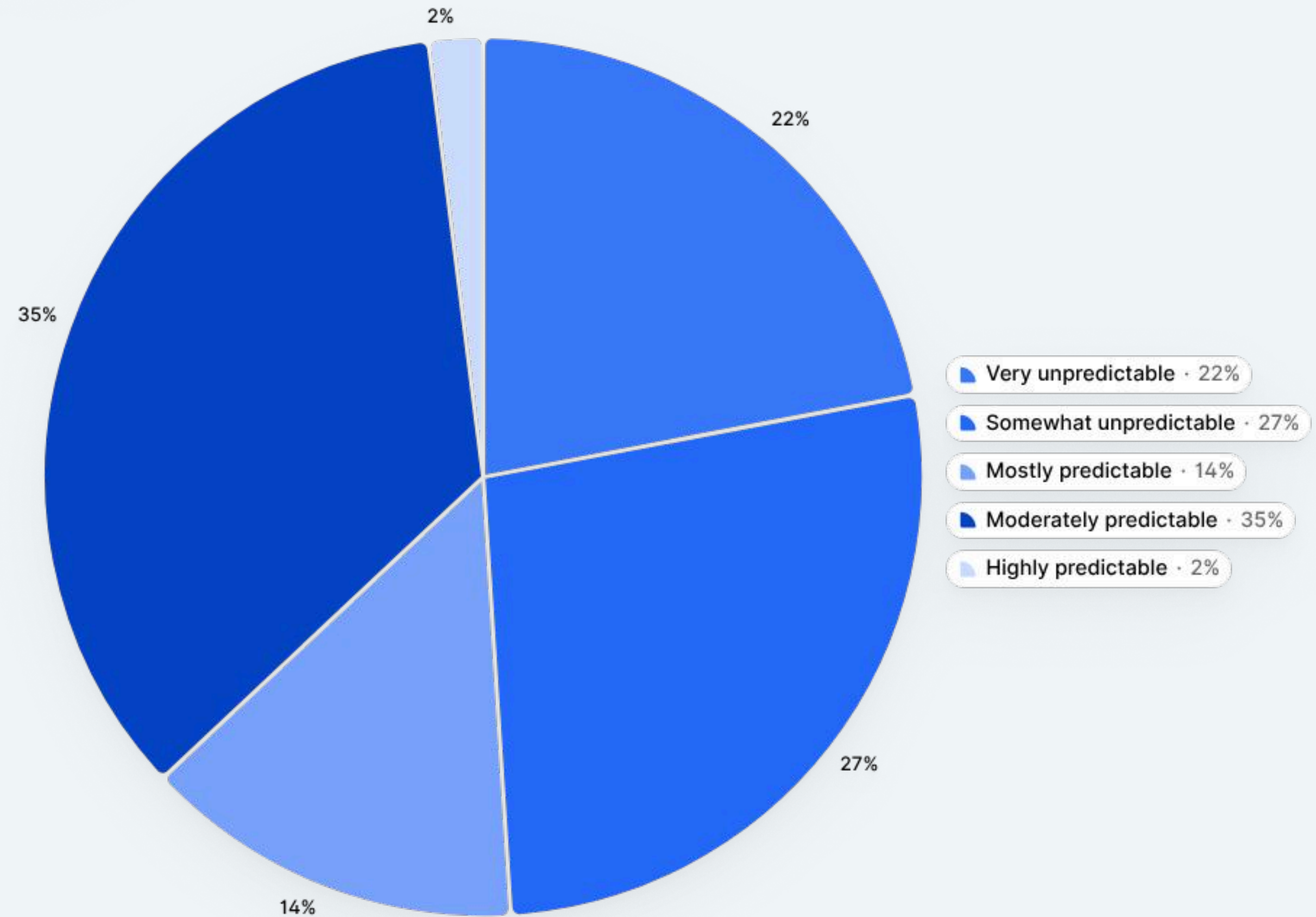


Source: Stotles' UK Public Sector Supplier Benchmark 2026

# Pipeline confidence is the warning sign

- Most suppliers cannot forecast confidently
- Unclear signals spread teams thin
- Better qualification protects scarce capacity

## How predictable does your public sector pipeline feel today?

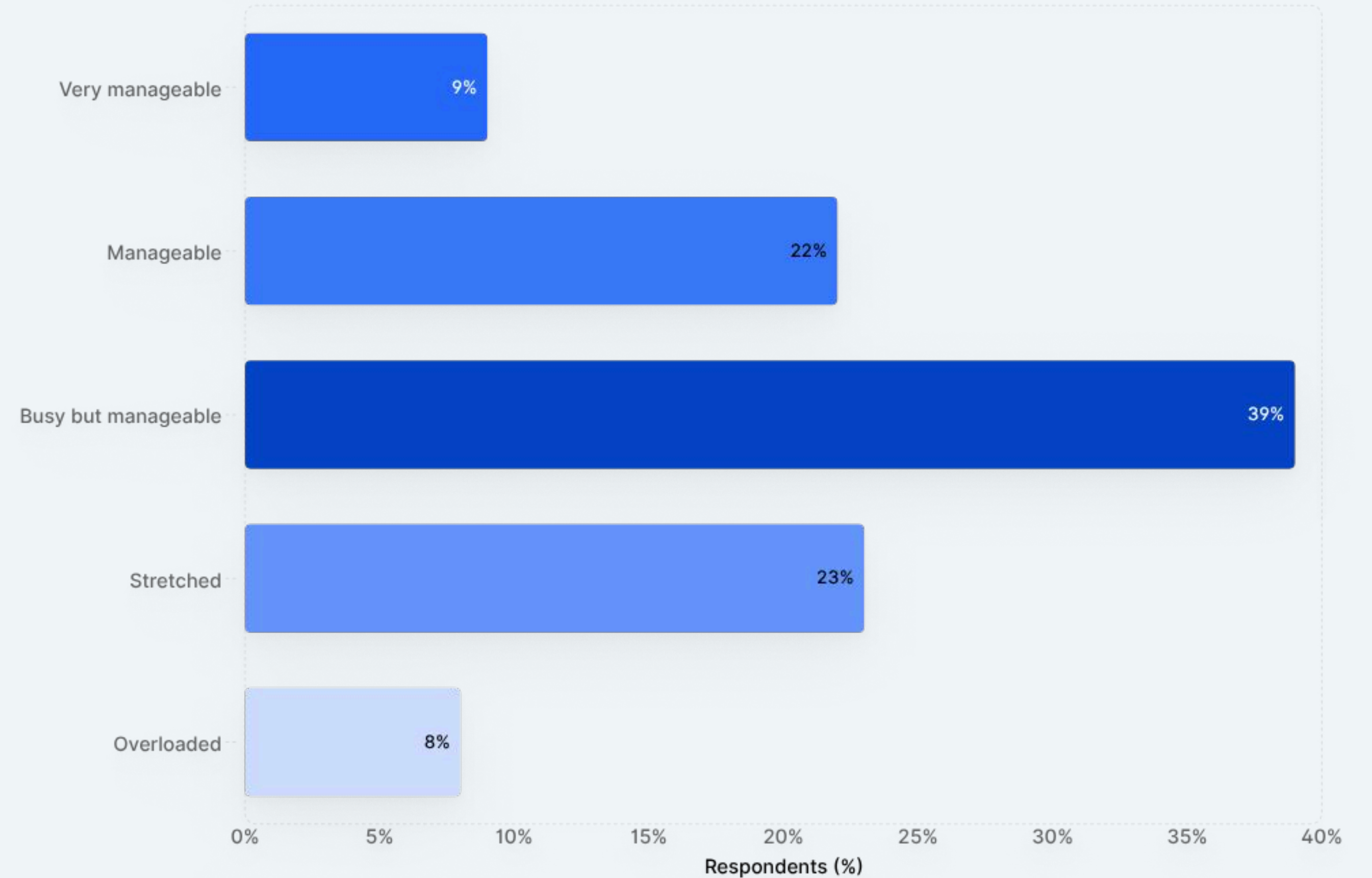


Source: Stotles' UK Public Sector Supplier Benchmark 2026

# Bid teams are close to capacity

- Bid teams are running hot
- Bad pursuits weaken good bids
- The answer is choosing better

## How would you describe your team's current workload when it comes to bids and tenders?



Source: Stotles' UK Public Sector Supplier Benchmark 2026

# 02.

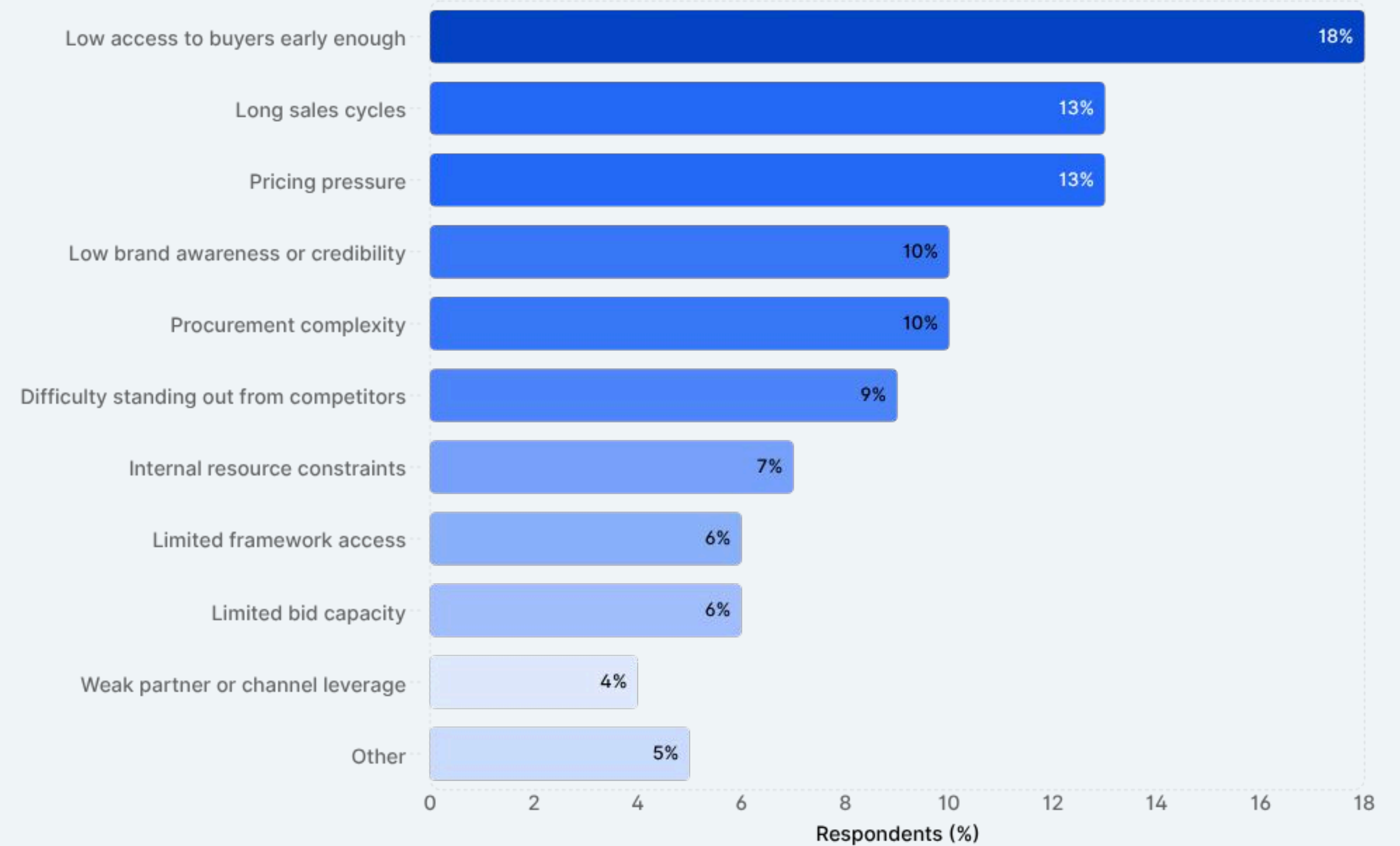
The wall before the door

# Biggest blocker slido

# Buyer access is the top blocker

- Early buyer access blocks growth
- Buyer requirements form before publication
- Late suppliers often start behind

## What are the biggest barriers to growing your UK public sector business today?



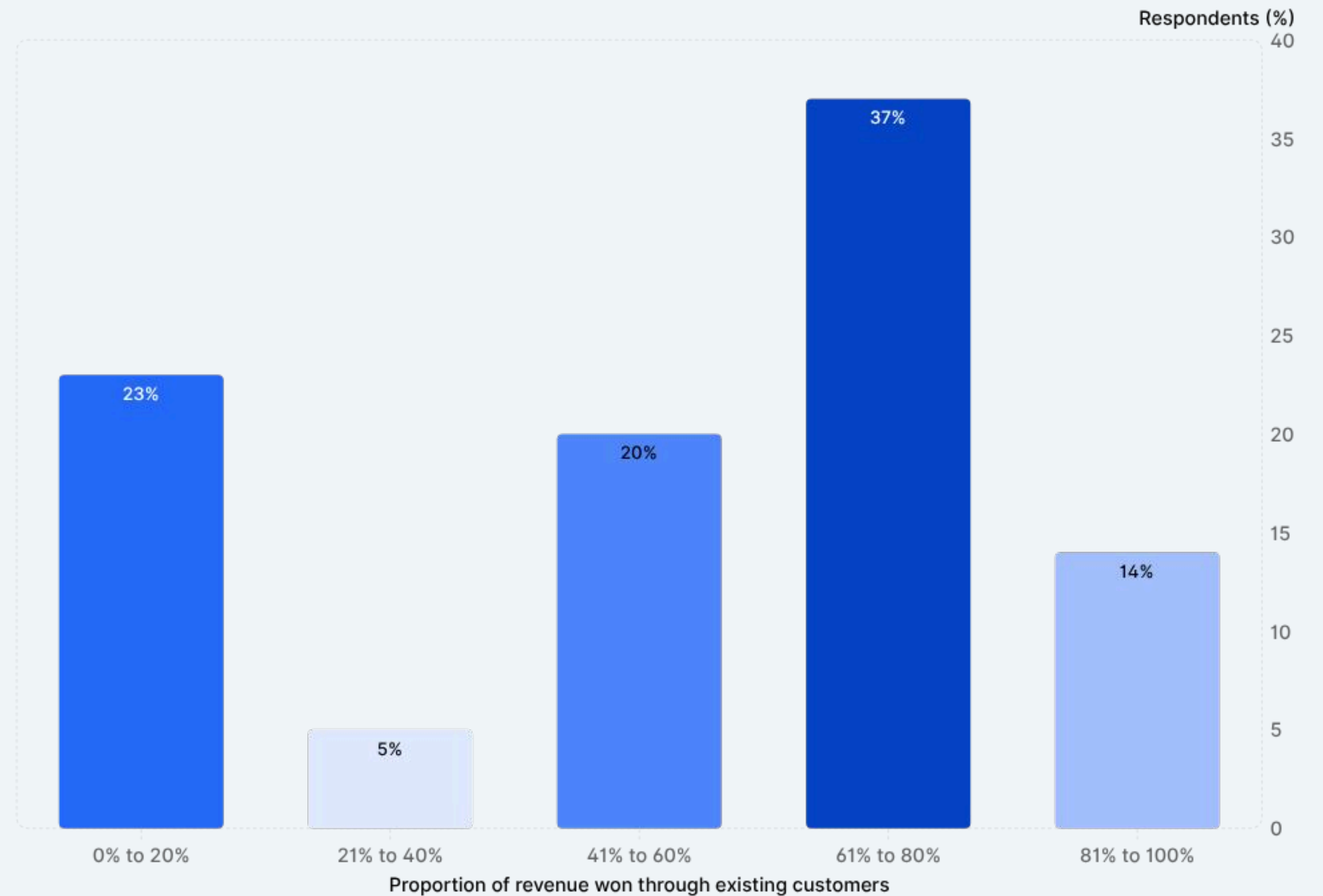
Other: Compliance/security requirements, client reluctance to go with someone new, and unclear internal priorities from buyers.

Source: Stotles' UK Public Sector Supplier Benchmark 2026

# Incumbency is systemic and buyers are risk averse

- Incumbency shapes buyer confidence early
- Change feels risky for buyers
- Assess incumbent strength before bidding

## What proportion of your UK public sector revenue comes from existing customers rather than new buyers?

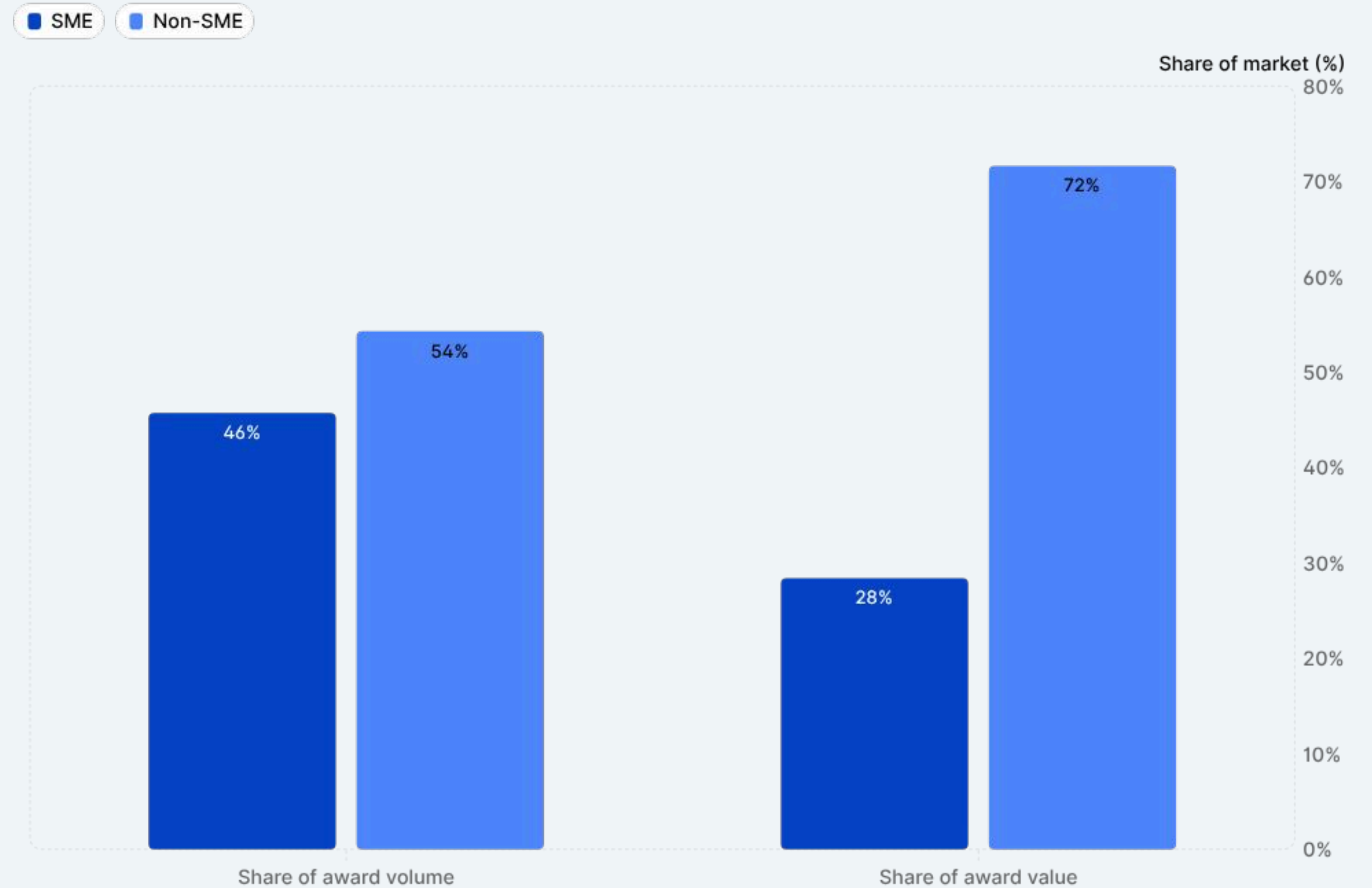


Source: Stotles' UK Public Sector Supplier Benchmark 2026

# SMEs win volume, not value

- SMEs win volume, not value
- Big contracts skew to larger suppliers
- Complexity hits thinner teams harder

## How are the SMEs stacking up in terms of awards versus the rest of the market?



Source: Stotles' public sector procurement data insights

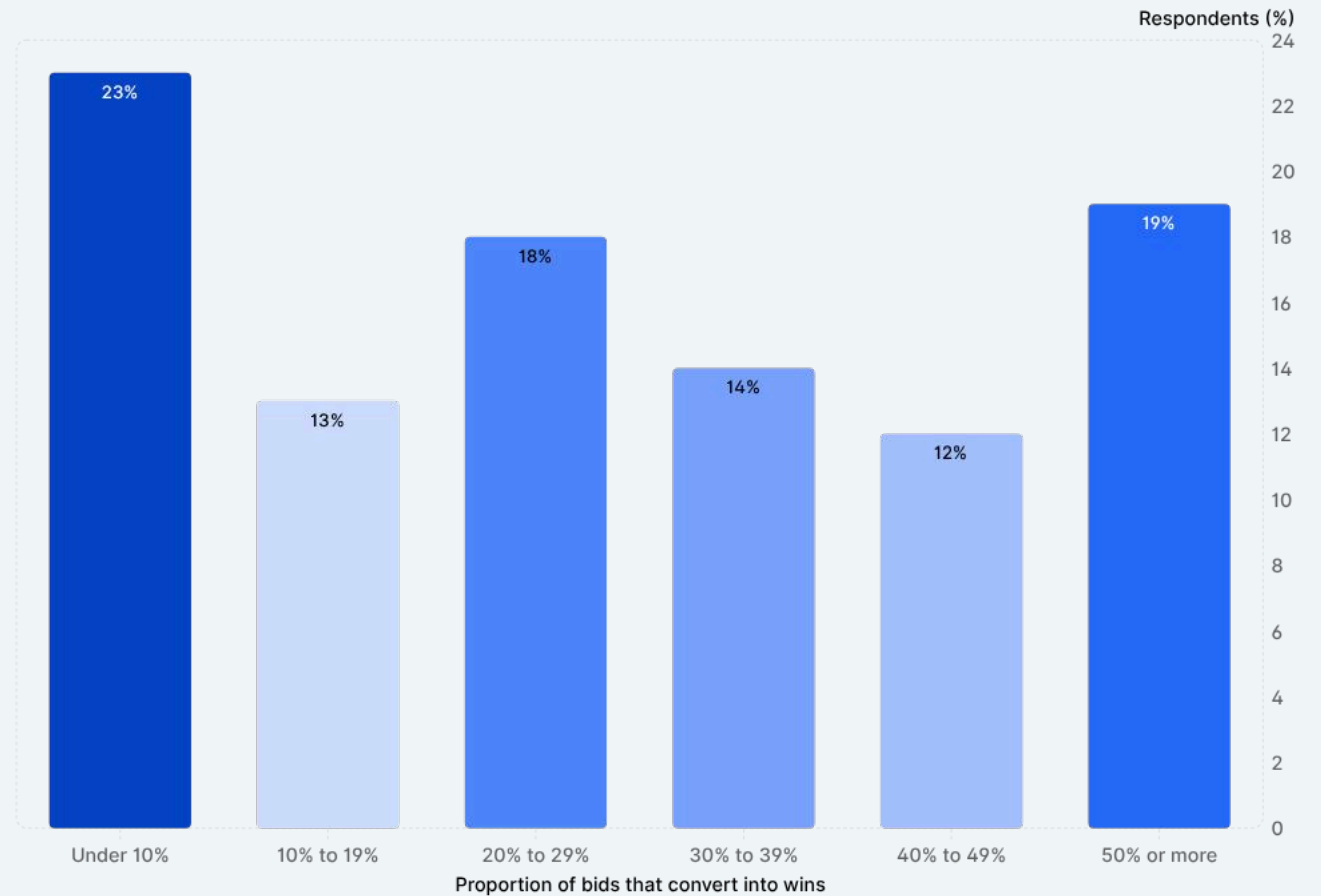
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**Winners compete differently**

# Win rates are fragile

- Most win rates remain fragile
- Low conversion drains scarce capacity
- Better pursuit choices raise returns

## What proportion of submitted public sector bids convert into wins?

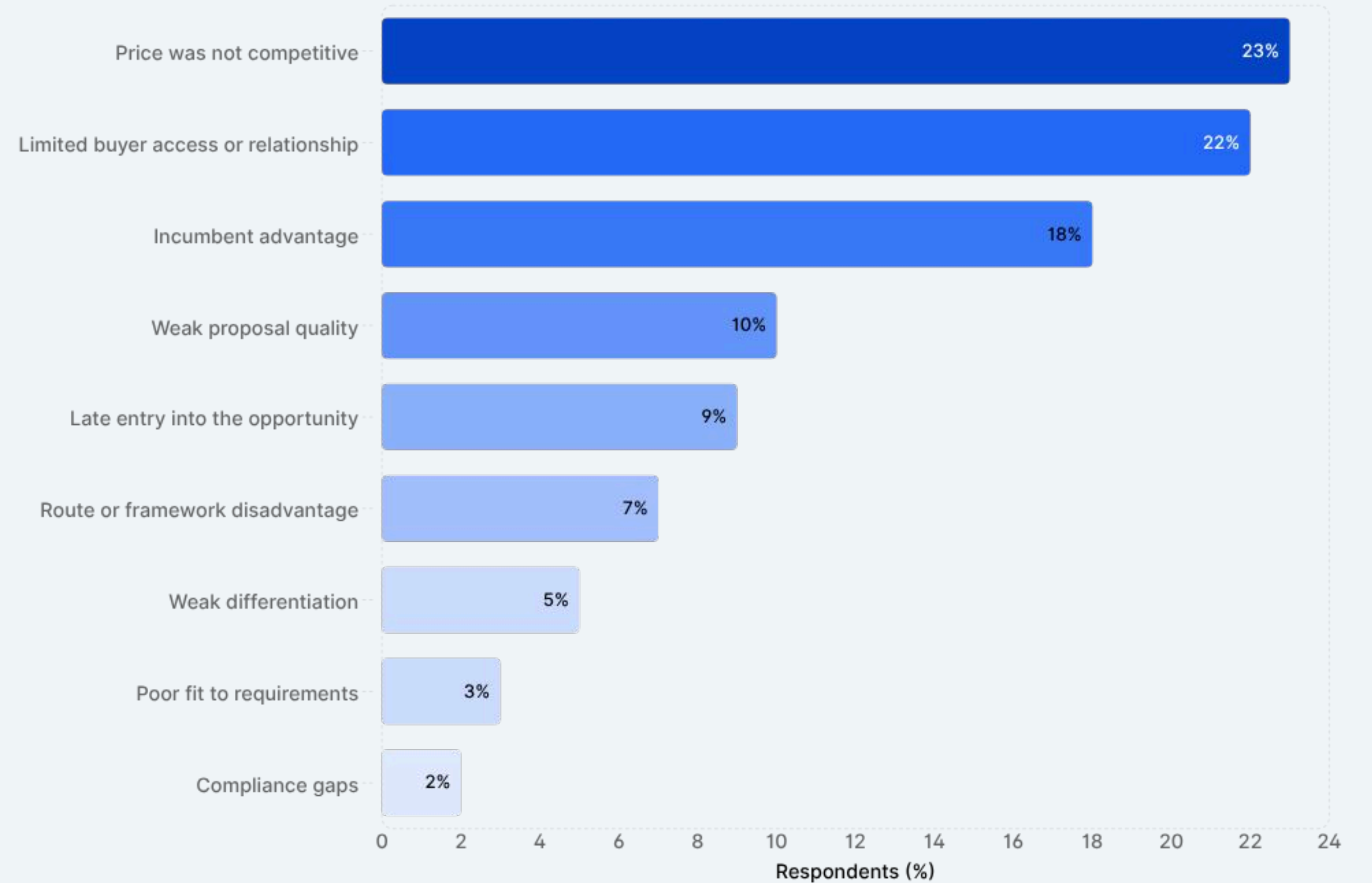


Source: Stotles' UK Public Sector Supplier Benchmark 2026

# Losses are shaped before the bid

- Losses form before proposal writing
- Price, access and incumbency dominate
- Strong bids cannot fix late entry

## What are the most common reasons your team loses public sector bids?

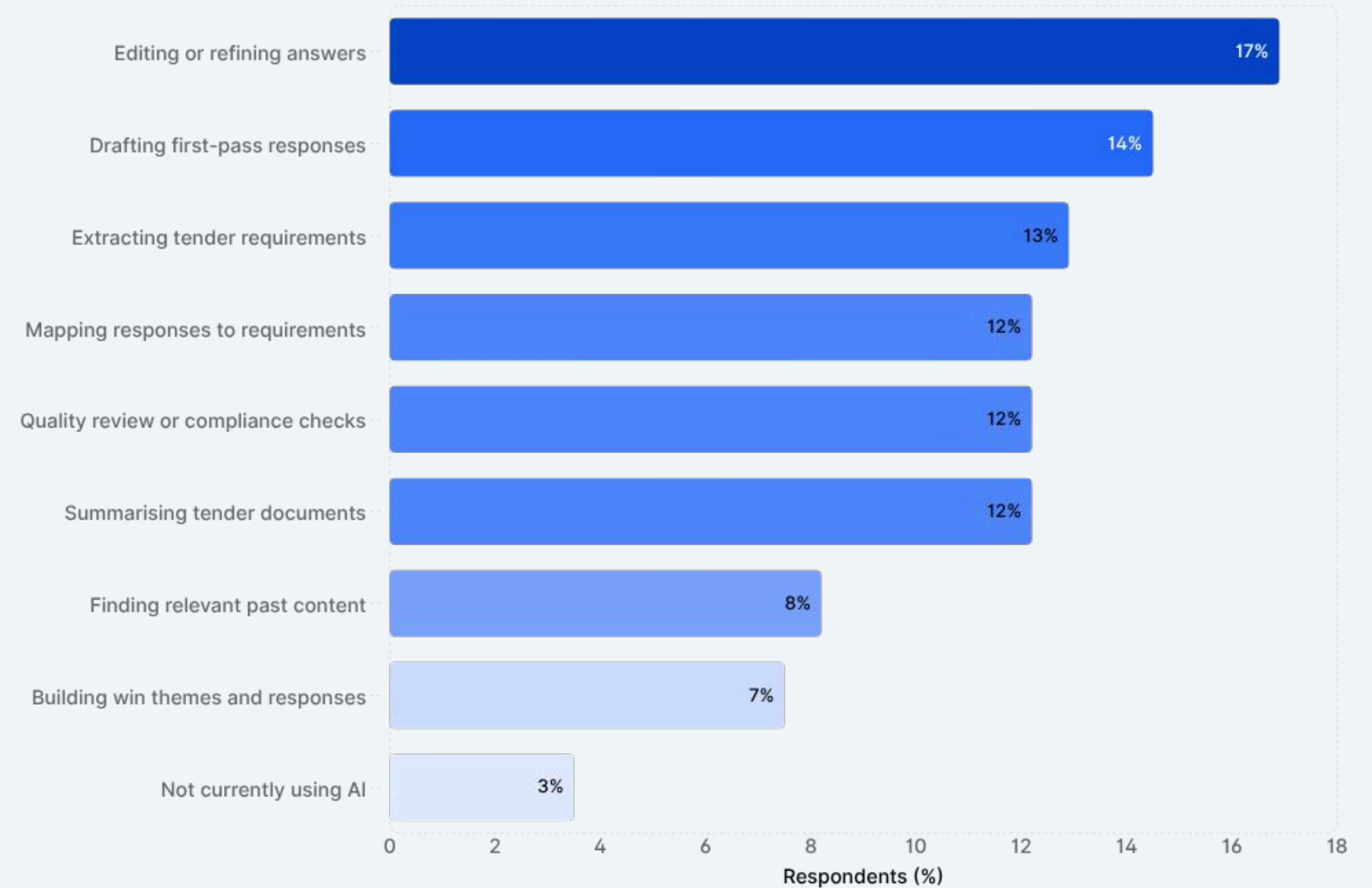


Source: Stotles' UK Public Sector Supplier Benchmark 2026

# AI is useful, but still tactical

- AI speeds production, not judgement
- Most use it tactically today
- Next gains come from an improved strategy

## How is your team currently using AI in public sector bid workflows?



Source: Stotles' UK Public Sector Supplier Benchmark 2026

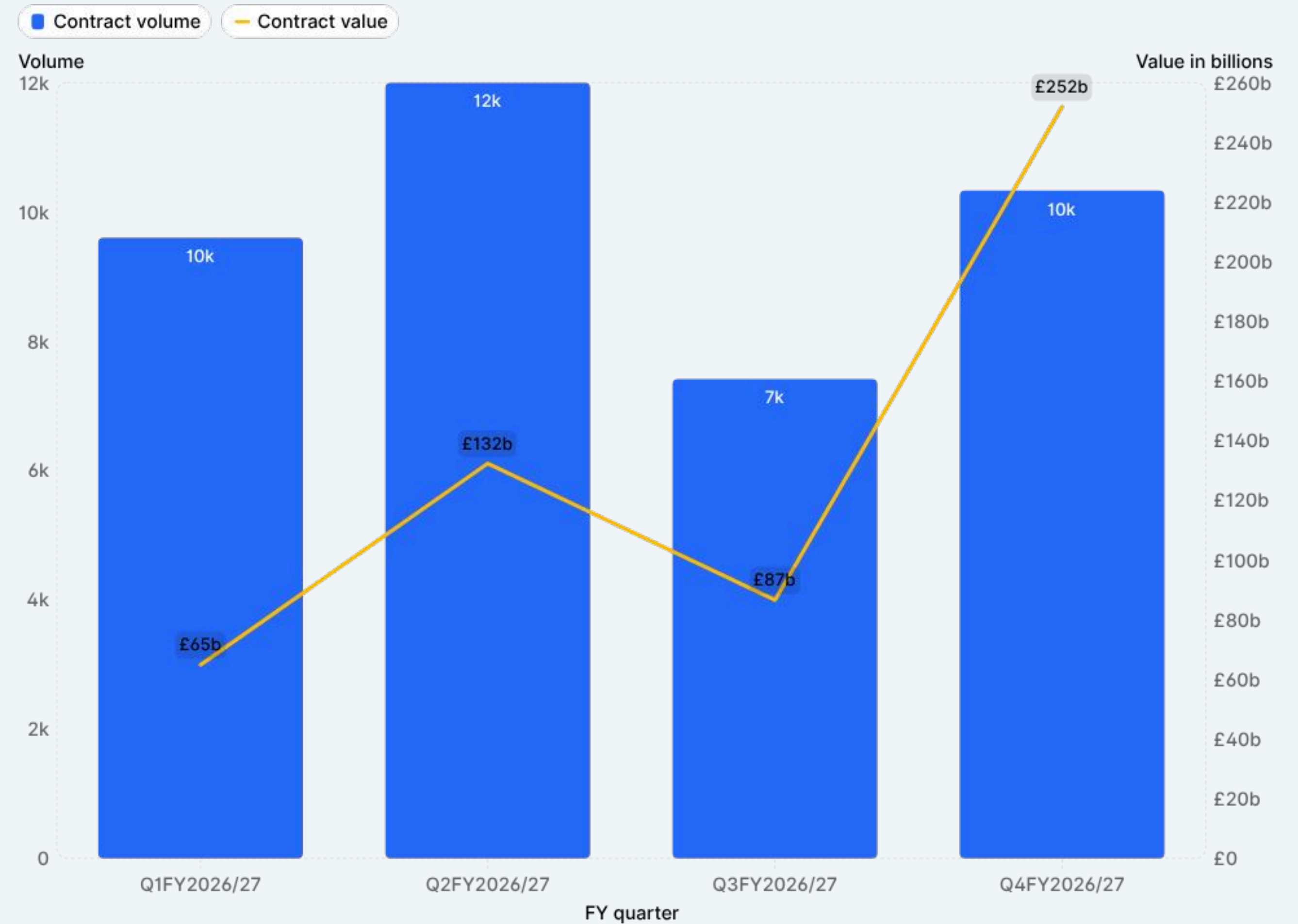
# 04.

## The 2027 playbook

# The next advantage is earlier intelligence

- Expiries show future competition windows
- Earlier signals improve commercial judgement

## Contracts expiring across the public sector in 2026/27



Source: Stotles' public sector procurement data insights

# The 2027 qualification model

- Test buyer, opportunity, route and winnability
- Look for timing, access and evidence
- Move from volume to winnability

## 01

### Buyer fit

- What is the buyer trying to change?
- Why does it matter now?
- Is there confirmed budget or only interest?
- Is the buyer open to a new supplier?
- Has the buyer switched suppliers before?

## 02

### Opportunity fit

- Is the problem urgent enough to fund?
- Can we prove measurable value?
- Can we show savings, productivity, risk reduction or service impact?
- Do we have evidence that fits this buyer's context?
- What is the cost of losing?

## 03

### Route fit

- Which route to market is likely?
- Are we on that route?
- Do we need a partner?
- Is the route open, framework-led, direct or incumbent-heavy?
- When does the current contract expire?

## 04

### Winnability

- Who is the incumbent?
- How strong is their position?
- Can we be price competitive without damaging margin?
- Have we engaged early enough to shape the requirement?
- What would need to be true for us to win?

# What you can do differently

- Stop chasing every relevant tender
- Start tracking buyer signals earlier
- Measure pipeline by credible winnability

## STOP

Chasing every relevant tender

Waiting for notices

Treating incumbency as a post-loss excuse

Using AI only to draft faster

Measuring pipeline by volume

## START

Prioritising opportunities where access, route and timing line up

Tracking expiries and buyer signals 6 to 18 months ahead

Measuring incumbent strength before pursuit

Using AI to improve qualification, evidence reuse and win strategy

Measuring pipeline by winnability and timing

# 05.

Q&A

## Three takeaways:

1. Policy is moving in your favour
2. Access is still the hardest part
3. The winners will target buyers, timings and routes to market more precisely

## 2026 supplier benchmark:

- We're releasing the 2026 UK Supplier Benchmark today.
- Look out for an email from us to read the full research and download the insights.

# The UK Public Sector Supplier Benchmark 2026

The market is moving.  
Access is not.

A supplier-led view of the UK  
public sector market in 2026