B1DREVIEW

A BIDREVIEW DATA REPORT

2026

The public sector recruitment market on the island of Ireland

Winning patterns, lost opportunities and how AI is reshaping the landscape

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Contents

Executive summary	3
The state of procurement	4
The €1bn advertised pipeline	6
Participation and the compounding of wins	9
The recruitment market	11
The league table	14
What makes a winning tender	17
The Northern Ireland dimension	22
The policy horizon to 2030	24
The market behind the market	26
What a pre-submission audit catches	27
The AI inflection point	30
A bid strategy for the next twelve months	33
The bottom line	34

€1bn+

disclosed estimated value across 200 recruitment tender notices, 2023 – Aug 2026

€710M

combined ceiling of the three largest notices – all HSE temporary and agency staffing panels

69.5%

of vendors winning Irish public contracts have won exactly one

62%

of Republic of Ireland recruitment firms that have won, have won more than once

Executive summary

Between 2023 and August 2026, Irish public bodies published 200 recruitment-related tender notices through 114 distinct contracting authorities, with disclosed estimated values totalling just over €1 billion.

Against that demand, participation is remarkably thin: of roughly 260 recruitment firms active in the Republic of Ireland market (within an all-island register of some 350), only 94 are visible as competitors in public tender records over the past two and a half years – and only 29 have a published contract win. Northern Ireland, analysed separately below, tells a structurally different story.

This report analyses those outcomes alongside 7,873 procurement records across both jurisdictions, 20 recruitment competitions examined in depth, and the 2026 labour market evidence.

The findings challenge conventional bidding wisdom. Cost-competitive bids routinely lose to higher-priced rivals. A single specialised framework can outweigh the accumulated value of the market's most frequent winner. Across the wider procurement landscape, seven in ten vendors have won exactly one contract and never repeated the feat. And the timing matters: private-sector hiring has stalled at precisely the moment public bodies are scaling temporary staffing frameworks and funding a digital skills build-out – making public procurement the recruitment industry's clearest structural growth opportunity.

Meanwhile, artificial intelligence is beginning to reshape tender evaluation – not by replacing human judgment, but by exposing what evaluators actually value in recruitment proposals.

94

recruitment firms visible as competitors in public tender records

29

of them hold a published contract win

7,873

procurement records analysed across both jurisdictions

20

recruitment competitions examined in depth

The state of procurement

Before examining recruitment specifically, the shape of the broader procurement landscape matters.

Across 7,614 companies winning Irish public sector contracts in all sectors:

- **5,469 vendors** (69.5%) have won exactly **one public contract** – and never repeated it
- **Only 4%** of vendors have achieved five or more wins
- Within recruitment specifically: **63 published awards totalling €27.4M**, with the **top three vendors holding 57% of that value**

This is not a market where success is evenly distributed. It follows a power law: a small number of firms win repeatedly, and the vast majority win once or not at all.

The one-win market

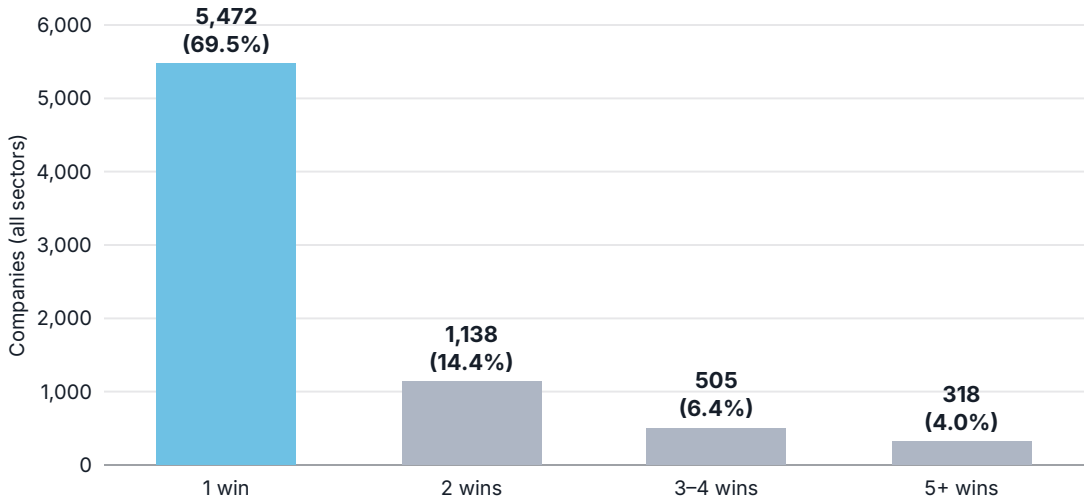


Figure 1. Winning vendors across Irish & NI public procurement, n = 7,877 companies with published awards. Source: BidReview award dataset.

A note on what this data captures

A necessary caveat before drawing conclusions.

This analysis is built on published contract award notices – the visible, competitive layer of public procurement. That layer understates the true market, and official data shows by how much.

The Office of Government Procurement's spend analysis (2019 being the most recent comparable full-year exercise) examined €4.9 billion of procurement expenditure – itself only 83% of the estimated €6 billion of addressable spend. Measured at invoice level, the sectoral picture also looks quite different from what award notices suggest: Health alone accounts for 53% of analysed public service spend, and the category containing recruitment services carried €131 million of spend in 2019 against just 48 published tender notices worth €27.7 million that year.

The gap between those two figures is instructive. The majority of recruitment expenditure flows through framework drawdowns, below-threshold engagements, and contract extensions – none of which generate a fresh award notice. Published awards are therefore a floor, not a measure, of the recruitment market. Sector weightings in notice data will also differ from actual spend weightings, since sectors vary in how much of their purchasing routes through open competition.

Two consequences for interpretation. First, the €27.4M figure is the contested tip of a considerably larger spend base – vendors holding framework positions are drawing down revenue this analysis cannot see. Second, and more usefully: the *competitive* patterns – who wins open competitions, on what criteria, by what margins – are robust, because they derive from the competitions themselves. It is the absolute market-size figures that are conservative by construction, not the behavioural findings.

The visible market vs the spend base

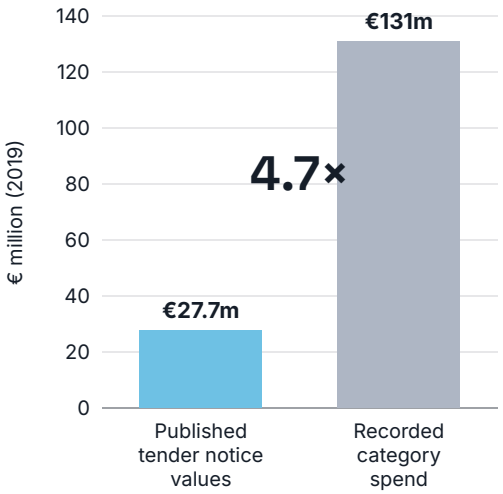


Figure 2. Recruitment-containing category, 2019. Source: OGP Public Service Spend and Tendering Analysis.

The €1bn advertised pipeline

If published awards understate the market, the forward pipeline shows just how much.

Between January 2023 and August 2026, Irish public bodies published 200 recruitment-related tender notices through eTenders – issued by 114 distinct contracting authorities, from the HSE and the Courts Service to universities, regulators, and commercial semi-states. Notice volume tripled from 2023 to 2024 and has held at that elevated level since.

Where estimated values were disclosed (139 of the 200 notices), they total just over €1 billion. That figure needs careful handling: it is dominated by framework and panel ceilings rather than guaranteed spend, and it is extraordinarily concentrated. The three largest notices – all HSE panels for temporary and agency staffing – carry a combined ceiling of €710 million, more than two-thirds of the total. Strip those out and the remaining 136 notices still advertise over €300 million, with a median estimated value of €600,000 – a figure to read carefully, since a notice's ceiling may be divided across several appointed suppliers rather than accruing to one.

Three structural features of this pipeline matter for vendors:

Health dominates, mirroring the spend data. The OGP's invoice-level analysis showed Health at 53% of public service spend; the tender pipeline tells the same story from the other direction. The HSE is the single most frequent issuer of recruitment notices and the source of the market's largest ceilings. For staffing firms, healthcare is not a vertical among many – it is the centre of gravity of the entire public recruitment market. And it is a centre of gravity under political pressure. The HSE spent €903.4 million on agency staff in 2025 – €832.4 million excluding voluntary hospitals, up 14% on 2024 – against a 2026 service-plan commitment to cut the bill towards €760 million, a target the Department of Health has noted it is yet to see evidence of. HSE estimates put agency staff at roughly 30% more expensive than directly employed personnel, with much of the differential going to supplying agencies. Most striking of all, when asked which recruitment firms received this money, the HSE responded that spending on recruitment services is not centrally collated nor separately identifiable in its finance ledgers – the most recent company-level

The advertised pipeline, 2023–2026

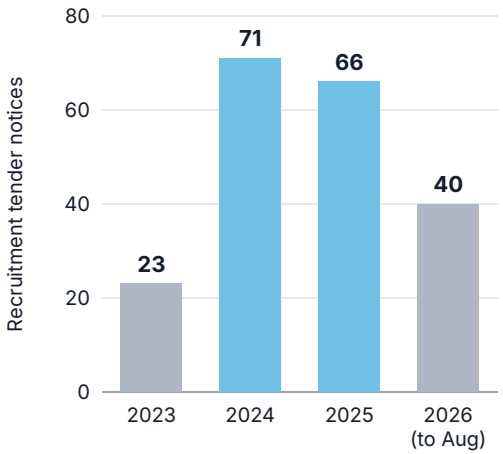


Figure 3. 200 notices, 114 contracting authorities. €1.02bn disclosed ceilings across 139 notices; €710M of it in three HSE temporary staffing panels. Source: eTenders search extract, Jan 2023 – Aug 2026.

The €1bn advertised pipeline... continued

figures date from 2022. The published award data analysed in this report is, in other words, one of the few public windows into who holds the supply arrangements behind a €900 million and politically contested annual spend.

That political pressure has now produced a concrete threat to the demand side. In June 2026 the Minister for Health – declaring herself "driven demented" by agency costs – announced the establishment of an internal HSE staff bank, explicitly modelled on the NHS approach, so that HSE staff seeking extra hours apply through the HSE rather than through external agencies. If delivered at scale, an internal bank attacks the highest-volume, lowest-differentiation segment of agency supply first: shift-filling for existing staff. It is less able to replace genuine external sourcing – hard-to-fill specialties, international recruitment, executive search – which is where specialised vendors already earn their premium. The strategic reading for recruitment firms is uncomfortable but clear: the commodity end of the health staffing market is now in structural decline by policy intent, and the value of a healthcare panel seat will migrate further towards the categories an internal bank cannot serve.

The buyer base is far wider than most vendors realise. 114 distinct authorities bought recruitment services through open competition in this period – and the large commitments are not confined to health. The Courts Service's Recruitment Agency Services framework – contractor supply for its transformation programme – was awarded in August 2026 as a five-year, single-supplier framework without reopening of competition, with a €20M maximum value and a 50/50 quality-cost split. Nine firms tendered. The winner was eir business – a large operator, not a traditional recruitment agency – and the award value itself was not published, only the framework ceiling. One notice, three of this report's themes in miniature: serious contested fields, non-traditional entrants taking recruitment-adjacent frameworks, and a published record that discloses who won but not what it is worth. Beyond the obvious names sit dozens of smaller buyers – regulators, cultural institutions, development agencies – running competitions valued between €100,000 and €2 million. These smaller competitions attract fewer bidders and suit firms building their first public sector references.

Single-supplier awards dominate the visible record – with a caveat. Within the eTenders award extract, 26 of 30 recruitment award records named a single winner and four named two. That likely understates multi-supplier arrangements, because panel appointments are often published per appointee rather than as one notice; a definitive split requires notice-level review, which the digital procurement roadmap's data reforms should eventually make routine. The notice titles point the same way: of the 200 notices, 58 identify themselves as frameworks or panels and 3 as dynamic purchasing systems, while 14 are explicitly single-party and the remaining 125 are ordinary contract notices carrying no multi-supplier language. The visible pattern is consistent: where recruitment competitions conclude with a published award, they mostly conclude with one name on it – but the multi-supplier minority contains most of the largest ceilings.

Frameworks and panels are the dominant vehicle. More than a quarter of the 200 notices are in "Established" status – live frameworks whose drawdowns will never generate a fresh award notice. This is where the gap between published awards (€27.4M in our sample) and advertised ceilings (€1bn+) will be filled: quietly, through mini-competitions and call-offs visible only to panel members. The strategic implication is blunt – a panel seat is an asset whose value is invisible in public data, and a vendor absent from the panels is absent from the market.

The renewal calendar is knowable in advance. Framework agreements run to a four-year

The €1bn advertised pipeline… continued

maximum under procurement rules, which makes the forward market computable from the notices already published. Of the arrangements established or awarded in our dataset, 11 reach the end of their maximum term in 2027 and a further 45 in 2028 – a renewal wave that includes ComReg's €35M multi-lot recruitment framework, SEAI's €12M recruitment agencies framework, Louth and Meath ETB's €8M single-party agreement, the Education Procurement Service's €2.6M multi-supplier framework and a series of smaller single-party arrangements across regulators, councils and cultural bodies. Many will re-tender earlier than the maximum-term date; none will re-tender later. A firm that wants a seat in 2028 starts building its evidence base now – which is rather the point of everything that follows.

The full calendar – all 56 arrangements reaching maximum term across 2027–2028, with buyers, ceilings and eTenders references – is published as a companion asset to this report.

Table 1: The 2027–2028 renewal wave (selected arrangements)

Renewal window	Buyer	Arrangement	Ceiling
2027	An Garda Síochána	Managed end-to-end recruitment service	€4.0M
2027	Atlantic Technological University	International student recruitment DPS (x2)	€15.0M
2027	Ombudsman for Children's Office	Recruitment services framework	€0.4M
2028	ComReg	Multi-lot recruitment framework	€35.0M
2028	SEAI	Recruitment agencies framework	€12.0M
2028	Office of the Govt CIO	Recruitment agency services	€10.0M
2028	Louth & Meath ETB	Single-party framework	€8.0M
2028	Irish Defence Forces	Recruitment services	€6.2M
2027–2028 total	**56 arrangements reach maximum term**		**€110.8M**

Estimated from publication date plus the four-year maximum framework term; actual terms may be shorter, bringing renewals forward.

Participation and the compounding of wins

The one-win pattern invites an easy misreading – that something stops firms winning twice.

The one-win phenomenon deserves more than a passing explanation, because it is the defining feature of this market. The more prosaic explanation, and the one the data better supports, comes down to four mechanisms.

Wins scale with participation. Firms that bid rarely, win rarely. Most one-win vendors are not firms that failed to repeat; they are firms that competed once or twice, won, and have not sustained a bidding pipeline since. The firms at the top of the win table are, before anything else, the firms that keep entering competitions. Treating tendering as an organisational capability – a maintained pipeline, retained evaluation feedback, evidence libraries, methodology documents that improve between competitions – rather than an occasional event is the single clearest behavioural difference between the multi-win firms and the rest. A one-off bid, however well-written, competes against accumulated institutional learning.

The maturation curve. Public sector evaluation rewards a specific grammar – weighted criteria, evidence thresholds, compliance discipline – that differs materially from private sector sales. Our data suggests a two-to-three-competition maturation period before firms internalise how their submissions are actually read. Firms that abandon tendering after one loss, or one lucky win, never complete the curve.

References compound – and so does methodology. Each delivered public contract generates the assets the next competition scores: named reference clients, verified performance data, case studies with public sector context. A firm bidding with two delivered frameworks behind it is not writing a better bid – it is evidencing a stronger one. Evaluation feedback across the 20 competitions consistently identifies methodology as the decisive differential, with 250–350 point gaps between successful and unsuccessful bids on 1,000-point scales. This is why the win

> *Before our first public award, we were answering 'describe your experience of comparable public sector contracts' with adjacent work and good intentions. We've now run the same State-sector account continuously since 2020, around 40 contractors at any one time, including managing a TUPE transfer into the contract. Every bid since has been able to point at that. The scoring didn't change; what we could evidence changed. That's why 61% of winners have won more than once. It isn't that the same firms get favoured, it's that the first contract is what lets you answer the questions properly.*
>
> — Barry Prost, Chair / Co-Founder, Rent a Recruiter

Participation and the compounding of wins… continued

distribution steepens at the top: the marginal cost of a credible bid falls with every contract delivered, while for the first-time bidder it has never been higher than it is on bid one. First-time winners who don't systematically harvest this evidence re-enter the market no stronger than they left it.

Price is a false comfort. Low-cost bids frequently lose despite winning the cost criterion outright. Firms that respond to a loss by cutting price further are optimising the wrong variable – and typically lose again, concluding wrongly that the market is closed to them.

None of these mechanisms is mysterious, and all of them are actionable. Participation is a pipeline decision; references are a harvesting discipline. The firms stuck at one win typically lack the second – they delivered the contract but never converted the delivery into reusable, scoreable evidence.

The participation funnel

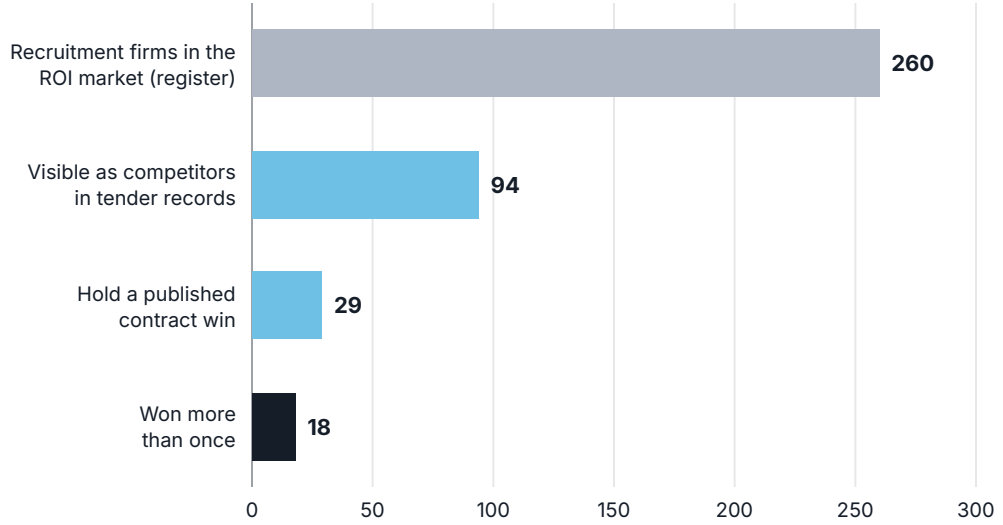


Figure 4. Visibility = winners, named unsuccessful bidders, and firms recorded as active on competitions. Republic of Ireland, 2023 – Aug 2026. Register post-ERF consolidation. Source: BidReview dataset.

The recruitment market

Over the past two and a half years, 94 recruitment companies are visible as competitors in public tender records.

The distribution of success across that group tells a more interesting story than any single firm's performance.

How the winners break down (data to 31 August 2026):

- **Two firms** lead: one with six framework wins, one – after a Mayo, Sligo and Leitrim ETB award in June 2026 – with five
- **Three firms** sit behind on four wins each – a mix of general staffing (including a firm that added a Mental Health Commission single-party framework in February 2026), recruitment process outsourcing, and executive search
- **Three firms** hold three wins apiece
- **Ten firms** have secured two wins – this tier contains the single largest contract in the sample (a €10M healthcare recruitment framework) and its newest entrant, which converted a second win via a multi-party temporary staffing framework for Fáilte Ireland in June 2026

How the 94 break down

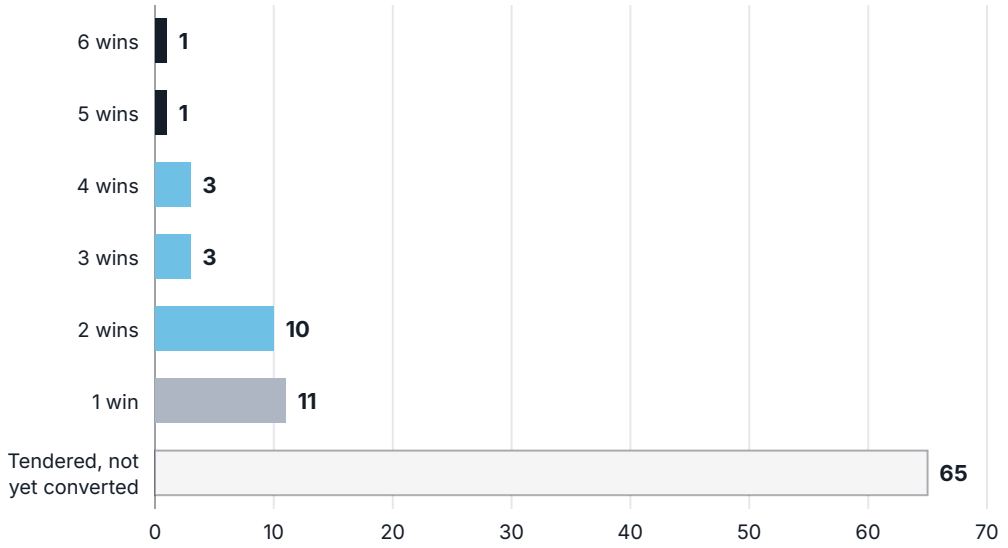


Figure 5. ROI recruitment firms visible in public tender records, 2023 – Aug 2026, by published wins.

The recruitment market... continued

- **Eleven firms** have converted one win and are at the critical inflection point between one-off success and repeatable capability

The remainder – the substantial majority of the 93 – have tendered actively without yet converting. That's not a failure statistic; it's the shape of a market where the learning curve is real and the entry cost is persistence.

How contested are these competitions once a firm enters? The disclosed evidence is partial but consistent: one framework competition in our evidence pack ranked eleven bidders; nationally, the Procurement Strategy's 2025 baseline shows 10,147 suppliers responding to competitions from which 2,262 emerged with a contract. Per-competition bidder counts are not systematically published, but where they surface, recruitment competitions attract fields large enough that mid-table is the default outcome – which is precisely why the scoring mechanics examined next decide who escapes it.

Two observations stand out from this distribution:

First, wins do not correlate neatly with value. The firm with the most wins (six) has accumulated roughly €1.3M in contract value, whilst a two-win specialist holds a single €10M healthcare framework – 36% of the entire market's published contract value. Frequency of winning and scale of winning are different games, played with different strategies.

Wins vs value – different games

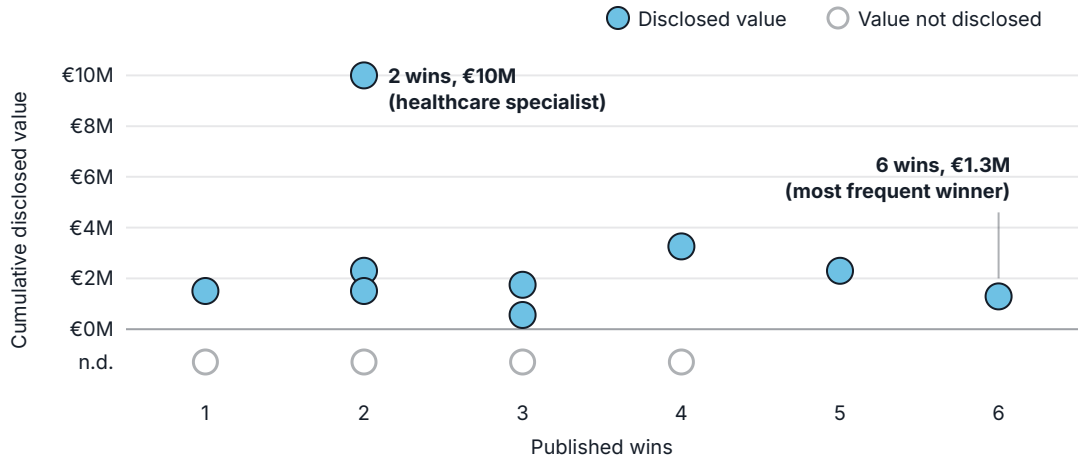


Figure 6. 29 ROI recruitment winners. Frequency of winning and scale of winning do not correlate.

Second, the specialisation premium is unmistakable. General recruitment frameworks typically award contracts valued at €1.5–3M. Specialised frameworks – healthcare, IT, executive search – award contracts valued at €7–15M. The vendors clustered at the top of the value table are overwhelmingly those who chose a vertical and built demonstrable depth within it.

The empty framework seat

A panel appointment is not revenue, and the gap between the two deserves more honesty than the market usually gives it.

Firms hold framework positions that have produced no call-offs at all – and the published record offers them no way to know whether that is normal or a warning sign.

From the evaluation side of the table, three things are worth knowing. First, it is common: multi-supplier panels routinely concentrate call-offs on one or two appointees, with the remainder held as capacity insurance and price tension – a buyer gains from your presence on the panel without ever using you. Second, ranking and rotation rules matter more than most bidders realise at tender stage: where a framework ranks suppliers, the firm in first position may take everything below the mini-competition threshold, and the terms that determine this are in the framework agreement, not the award notice. Third, dormant seats respond to account management, not patience: buyers using a panel narrowly are rarely dissatisfied with the unused suppliers – they are unaware of them. The post-award work of staying visible to the buyer is unglamorous, unmeasured in any dataset, and decisive.

The practical test before bidding for any multi-supplier framework: ask how call-offs will be allocated, what the reopening threshold is, and what the incumbent concentration looked like on the previous iteration. If the answers are unknowable, price the seat as an option, not as revenue.

> *A framework seat isn't a contract, it's permission to compete. We've held a position for 24 months that hasn't produced a single call-off. That's not a complaint about the buyer; demand moves and budgets move. But it changed how we qualify. Before we bid now we ask three things: what was actually drawn down under the previous arrangement, how many suppliers sit on the panel and how call-offs get allocated between them, and who inside the organisation actually raises the requisition. Where a buyer can answer those, you can plan resource around the award properly. Where nobody can, you're bidding on hope.*
>
> — Barry Prost, Chair / Co-Founder, Rent a Recruiter

The league table

Because contract award notices are public record, the most active winners can be named.

A necessary caveat comes first, and it is not a small one: these figures count published award notices in this recruitment extract only – a fraction of what these firms have actually won. Many of the arrangements listed are framework or panel appointments, and the call-offs and mini-competition wins that flow through them are never separately published; nor are direct awards, extensions, or awards outside this extract's scope. The market's most established supplier would count its true public sector wins in the tens, not the single digits shown here. Read the table as a record of visibility in open competition, not a tally of contracts held. Values are published award values where disclosed; "n.d." marks awards whose values were not published.

Republic of Ireland competitions – most active published winners: Cpl Solutions Limited leads on frequency with six published wins (€1.29M disclosed); Hartley People moved to five with a €2.2M Mayo, Sligo and Leitrim ETB award in June 2026. Perrett Laver, Osborne Recruitment (€3.26M – the largest disclosed general staffing value, including a €3M Mental Health Commission single-party framework) and

Republic of Ireland – most active published winners

Company	Published wins	Disclosed value
Cpl Solutions Limited	6	€1,290,000
Hartley People	5	€2,297,111
Osborne Recruitment	4	€3,260,000
Perrett Laver	4	n.d.
Conscia Talent (Belfast HQ)	4	n.d.
Morgan McKinley	3	€1,750,000
Odgers Berndtson	3	€552,000
Servisource Recruitment	3	n.d.
Cpl Healthcare	2	€10,000,000
Noel Recruitment	2	€2,300,000
Sigmar Recruitment	2	€1,500,000

The league table… continued

Belfast-headquartered Conscia Talent follow on four each – Perrett Laver's presence a marker of how strongly executive search performs in open competition. Morgan McKinley (three, €1.75M), Odgers Berndtson (three, €552K) and Servisource Recruitment (three, n.d.) make up the three-win tier. Conscia Talent's four Republic wins include both Health and Safety Authority frameworks – the island's clearest dual-jurisdiction operator. On disclosed value rather than frequency, Cpl Healthcare's €10M healthcare framework stands alone, followed by Osborne, Hartley People, followed by Noel Recruitment (two wins, €2.3M after a Fáilte Ireland temporary staffing framework in June 2026) and a cluster of firms – FRS Recruitment, PE Global, Sigmar – each holding €1.5M positions.

Northern Ireland competitions – most active published winners: Premiere Employment Group leads decisively with eleven awards, all through the Central Procurement Directorate. JDR Recruitment and D.F.P.F. Ltd follow on six each, with Stepping Stones NI and CPL Resources plc on four, and Clarendon Executive and SHL Group on three. One five-award winner appears in the public record only as "withheld for security reasons" – a reminder that even the published layer keeps some of its secrets.

Northern Ireland – most active published winners

Company	Published awards	Principal buyer
Premiere Employment Group	11	CPD
JDR Recruitment	6	CPD
D.F.P.F. Ltd	6	Armagh City, Banbridge & Craigavon
Name withheld for security reasons	5	CPD
Stepping Stones NI	4	Armagh City, Banbridge & Craigavon
CPL Resources plc	4	CPD
Clarendon Executive	3	NI Water

Table 2: Published award notices in this extract only – a fraction of contracts actually held. n.d. = value not disclosed. Data to 31 August 2026.

The two-win threshold

The win distribution itself makes the case for a threshold effect.

Of the 29 Republic of Ireland recruitment firms that have ever won, 18 – 62% – have won more than once. Set that against the wider register, where roughly one firm in ten has converted at all, and the pattern is clear: winning once is the hard part, and firms that get to two wins tend to keep winning. The mechanism is the evidence flywheel described earlier – each delivered framework generates the named references, performance data and buyer relationships that strengthen the next submission.

Implication: The hardest contract to win is the first. Vendors who systematically harvest evidence from early wins compound their advantage on every subsequent bid.

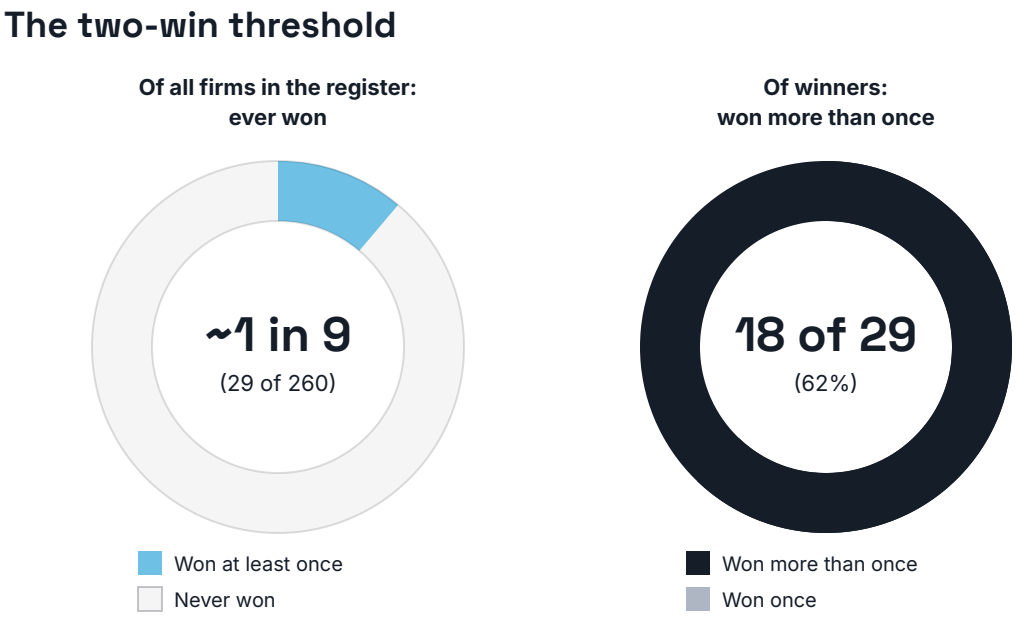


Figure 7. Repeat winning is the norm among winners and the exception among firms. ROI register.

What makes a winning tender

The evidence base, stated plainly.

This section draws on 20 recruitment procurement competitions from January to June 2026, and specifically on the subset where evaluators disclosed comparative scoring and written feedback – a small number of competitions, examined in depth, across buyers including ComReg, the Higher Education Authority, and the Health and Safety Authority. The patterns below are directional findings from that disclosed evidence, corroborated by a documented pre-submission audit – not statistical claims from a large sample. They are offered with that weight, no more and no less; readers can judge each against the disclosed numbers shown.

The methodology gap

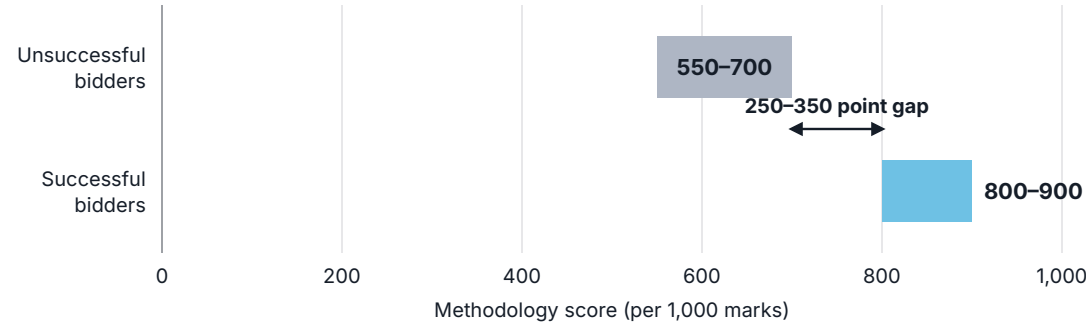


Figure 8. Typical bands across sampled competitions where scoring detail was disclosed.

20

competitions analysed

250–350

point methodology gaps in disclosed scoring

Both ways

cost-winning bidders losing, and cost-led winners beating better-quality bids – both documented

Pattern 1: Delivery methodology as risk mitigation

When procurement officers evaluate recruitment tenders, they're ultimately evaluating risk.

Will this vendor reliably fill roles? Can they scale? Do they understand our operational constraints?

Across the competitions in our sample where scoring detail was disclosed, the methodology differential is stark:

- **Unsuccessful bidders** typically score 550–700/1000
- **Successful bidders** typically score 800–900/1000

This 250–350 point gap is rarely about proposal length or presentation quality. Rather, it reflects the depth of operational thinking evident in the bid.

What successful bidders do differently:

Successful tenders move beyond process description to *operational specificity*. Instead of "our experienced team will manage recruitment cycles," they outline: named individuals with specific sector experience; defined escalation protocols for hard-to-fill roles; measurable turnaround time commitments; integration points with existing systems; weekly reporting structures.

This matters because procurement officers are often evaluating vendors against their own experience. A vague methodology reads as "this vendor hasn't thought this through" – implying risk. Specific methodology reads as "this vendor has done this before and understands our constraints."

The buyers say so in their own words. One evaluator's feedback to an unsuccessful bidder: "your response was acceptable but not tailored to [the buyer's] operational context – the successful tenderer demonstrated detailed understanding of our current process and proposed specific integration points." The word "acceptable" recurs across competitions, and it is not a criticism of quality; it is a statement that the response could have been submitted, unchanged, to any buyer in the sector. The same logic runs through team assessment: "while your team credentials are strong, the successful tenderer provided clearer accountability structures and performance metrics." Credentials were not the problem – strong CVs attached to unclear ownership lose to moderate CVs attached to named responsibilities, defined escalation routes and committed performance

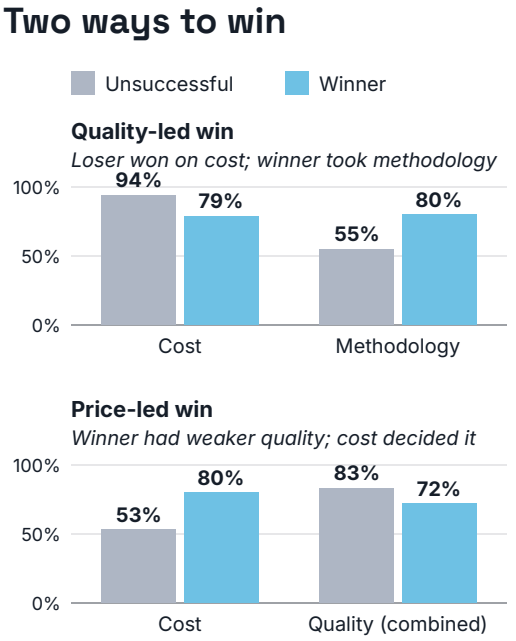


Figure 9. Disclosed scoring (% of available marks) from two competitions in the evidence pack. Same market, opposite strategies.

Pattern 1: Delivery methodology as risk mitigation... continued

metrics, because evaluators are pricing the risk of the engagement going wrong.

The cost paradox: Across the competitions where evaluators disclosed comparative scoring, a recurring pattern appears: the unsuccessful bidder held the stronger cost score and lost anyway. In one Health and Safety Authority procurement, the unsuccessful bidder took a cost score of 2,825 out of 3,000 under the Ultimate Cost formula – the stronger cost score – but lost to a vendor scoring 2,377. The evaluators noted the successful bidder demonstrated "detailed understanding of our operational context and proposed specific integration points" that justified the higher cost.

The wrong lesson from that example would be that price does not matter in this sector. It matters enormously – but not in one direction. Read across the disclosed scoring in our sample and cost behaves very differently from competition to competition. In one framework lot, two bidders received identical cost scores and the lot was decided entirely on quality. In another, an unsuccessful bidder in an eleven-firm field ranked ninth on Ultimate Costs – because these formulas score every bid relative to the lowest price received, aggressive pricing does not just save the buyer money, it manufactures scoring distance over the whole field. Cost scores do not converge; they disperse, and sometimes more widely than the quality scores. Where bidder counts are disclosed, recruitment competitions attract serious fields – eleven firms in that framework, nine in the Courts Service's 2026 award – which is worth holding in mind against the participation funnel: the competitions are contested, but by a narrow, recurring cast.

The result is that recruitment competitions are won at two different margins. The Health and Safety Authority case above is the quality-led win: the pricier bidder took the contract on methodology. But the same evidence pack contains the mirror image – a competition in which the winner carried a 1,093-point cost advantage (3,203 against 2,110, out of 4,000) whilst holding *weaker* quality scores than the bidder it beat, and won by a total margin of 409. That competition was bought on price, by a firm prepared to take the seat on a margin it would work out later. Anyone who has operated in this sector knows the pattern: win the framework thin, then recover through volume, temporary mark-ups, and rate movement across the framework's life – a dynamic with real consequences for buyers, given HSE estimates put agency staff at roughly 30% more expensive than directly employed personnel. The buyer's own feedback to losing bidders captures the quality-led half of the story – "you provided a more competitive cost proposal and were awarded higher marks under the cost criterion; however, the successful tenderer's overall value proposition was superior" – but the price-led half is just as real, and the scoring formulas actively enable it.

For a bidding firm, the practical discipline is diagnostic: before writing a word, read the weighting and the cost formula and work out which competition you are in. Where quality carries 70% and a minimum quality threshold applies, the contract will be won in the methodology section and priced sensibly. Where cost carries 30–40% under a lowest-price-relative formula against a thin field, an aggressive price can beat a better bid – and a sustainable price needs a methodology strong enough to survive the gap. Misdiagnosing the competition type is how firms end up optimising the wrong document.

Pattern 2: Vertical specialisation and market segmentation

The recruitment procurement market is stratifying by vertical.

General recruitment frameworks typically award contracts valued at €1.5–3M.

Specialised recruitment frameworks (healthcare, IT, executive, legal) award contracts valued at €7–15M.

The specialisation premium

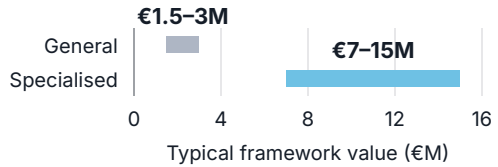


Figure 10. Typical advertised framework values from the 2023–2026 notice dataset. Specialised = healthcare, IT, executive, legal.

This five-fold value difference isn't random. When the Health and Safety Authority procured general and technical recruitment services, it awarded both frameworks to the same vendor – one that demonstrated tailored methodology for each. When it procured executive search separately, it selected a specialist executive search firm. Buyers are increasingly disaggregating categories because they recognise that sector specialisation drives better outcomes.

Why specialised vendors command premium contracts:

- **Credibility through depth**: A healthcare recruiter can speak to staffing models in NHS-equivalent settings. This credibility reduces perceived risk.
- **Reduced specification overhead**: Buyers don't need to educate a specialist on sector constraints; the specialist already understands them.
- **Measurable outcomes**: Specialists can cite sector-specific benchmarks (e.g., "average fill time for consultant nurse roles: 21 days"). Generalists cannot.
- **Pricing power**: Specialised vendors can charge 20–30% premium rates because their value is demonstrable.

The data shows this clearly: one healthcare recruitment vendor commanded a €10M contract representing 36% of published recruitment contract value across our sample. This single contract equalled the combined value of five mid-market general recruitment frameworks.

Legal recruitment illustrates where the next specialisation premium is forming. Buyers are already carving legal expertise out as its own lot – ComReg's recruitment framework included a dedicated Legal and Economics lot alongside general categories. On the demand side, market analysis from Sigmar's legal practice describes generalist legal roles declining in favour of niche expertise – data protection, fintech regulation, ESG compliance – with in-house legal teams expanding and retention pressure driving counter-offers. A recruitment firm that can credibly source regulatory and compliance specialists for public bodies is bidding into a lot most general staffing competitors cannot service.

For vendors currently positioned as "general," this signals a strategic shift: choosing one vertical and dominating it creates more sustainable revenue than competing across all categories.

Pattern 3: Multi-lot framework strategy

Procurement bodies increasingly structure tenders as multi-lot frameworks.

ComReg's 2024 recruitment tender, for example, included five distinct lots (Office Support, Professional Services, Legal/Economics, Technical, and Specialist). The Higher Education Authority similarly disaggregated temporary staffing needs across roles.

Our data shows that vendors bidding 2–3 lots with tailored methodologies demonstrate significantly higher selection rates than single-lot bidders. This isn't coincidental:

Multi-lot bidding signals:

- Operational capacity at scale
- Flexibility to shift resources between disciplines
- Understanding of cross-functional staffing challenges
- Ability to serve as primary vendor (reducing procurement overhead)

Yet most bidders target only a single lot, typically the largest by estimated value. This is strategically myopic. A vendor successfully winning two mid-sized lots typically generates more revenue and stability than winning one large lot – and the pathway to securing additional lots is clearer once you've proven delivery in multiple areas.

Procurement bodies reward this strategic approach. In one ComReg tender, the vendors appointed to multiple lots were those who demonstrated tailored methodology for each lot category, not generic "we can do anything" responses.

5 lots

in ComReg's 2024 recruitment tender: Office Support, Professional Services, Legal/Economics, Technical and Specialist

2–3 lots

bid with tailored methodologies – significantly higher selection rates than single-lot bidders

The Northern Ireland dimension

Extending the dataset across the border changes the picture in ways that matter for any firm operating on the island.

The register now covers 97 Northern Ireland recruitment firms alongside the Republic's, and the NI award records tell a structurally different story.

One buyer dominates. Where the Republic's 114 contracting authorities spread demand widely, Northern Ireland's public recruitment buying runs overwhelmingly through the Central Procurement Directorate (CPD), with NI Water, the NI Assembly, and district councils such as Armagh City, Banbridge and Craigavon making up much of the remainder. The NI data records 94 recruitment contract awards across 50 winning firms – and the most frequent winner alone holds 11 of them, all through CPD. For a vendor, this concentration cuts both ways: fewer relationships to build, but far fewer routes back in if a CPD framework cycle is missed.

Two procurement regimes, one island. Since 24 February 2025, Northern Ireland competitions run under the UK Procurement Act 2023 and its Most Advantageous Tender (MAT) test, whilst the Republic continues under the EU directives and MEAT. The tests are cousins, not twins: the UK regime gives buyers wider discretion on award criteria and introduces new exclusion and debarment machinery. A methodology section written for a MEAT evaluation will not automatically score under MAT, and vice versa. Firms already visible in both datasets – and several are, including large staffing groups and at least one Belfast-headquartered RPO specialist with wins on both sides of the border – hold a dual-regime capability most competitors lack. It is a genuine differentiator, and a scarce one: fewer than a handful of the roughly 350 firms in the combined register have converted wins in both jurisdictions.

The NI labour market is primed for agency demand – and it has followed the Republic's inflection with a lag. VANRATH's autumn 2025 market analysis described a candidate-driven market running hot: vacancies up 20% on the previous quarter and 44% above pre-pandemic levels, hiring intentions rising across four in five employment categories, and four in five employers reporting difficulty filling roles – with the NHS and private healthcare leading recruitment in digital care. By December, Hays'

94

NI recruitment contract awards across 50 winning firms

11

awards held by the most frequent NI winner – all through the Central Procurement Directorate

18,000+

people commute across the border to work

24 Feb 2025

UK Procurement Act 2023 and its MAT test in force in Northern Ireland

The Northern Ireland dimension… continued

Northern Ireland survey data recorded career confidence at its lowest measured level – 36% of NI professionals positive about their prospects, down from 45% a year earlier – with 61% intending to look for a new role within twelve months and 44% dissatisfied with pay. The sequence mirrors what the ERF monitor recorded in the Republic a few months later: a hot market cooling into hesitancy, with employee churn intention outlasting employer hiring confidence. NISRA's work quality statistics add the structural backdrop: job security is very high (97% of employees in secure employment) but training participation is the weakest of seventeen indicators at 21%. High intention to move plus low internal development is, from a staffing firm's perspective, a churn engine – and public bodies competing for the same talent will lean harder on agency supply and managed recruitment services to keep pace.

Cross-border labour flows make the all-island framing more than rhetoric. The Shared Island all-island labour market study puts a floor under the numbers: at least 18,000 people commute across the border to work, over 80% of them living or working in the border region, and the public sector looms unusually large in the flow – around 40% of Republic residents working in Northern Ireland work in health, education or public administration, while health professionals and teachers are among the largest occupational groups commuting in the other direction. The study also judges the recorded figures a significant underestimate. For recruitment firms, the implication is direct: the public sector talent pools on this island already overlap, and the firms structured to recruit across both jurisdictions are serving a labour market that workers themselves already treat as one.

Two markets, one island

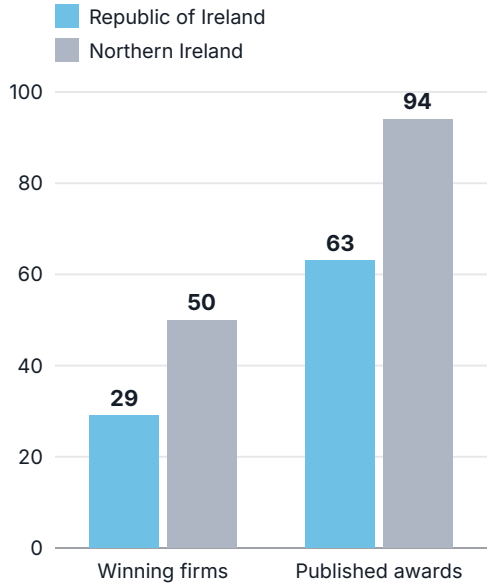


Figure 11. Published recruitment awards, 2023 – Aug 2026, both jurisdictions. ROI: 114 buyers, demand dispersed. NI: CPD-dominated, demand concentrated. Cross-border winners: a handful of ~350 firms. Source: eTenders / eTendersNI.

The policy horizon to 2030

What 2026–2030 has already decided.

The forward view does not require speculation. Between August 2025 and August 2026, the Irish Government published three documents that between them set the operating environment for public sector recruitment suppliers through 2030: the National Public Procurement Strategy 2026–2030, the Digital Ireland strategy, and the rollout of the Civil Service Capability Framework. Read together, they tell a bidding firm most of what it needs to know about the next four years.

The National Public Procurement Strategy puts numbers on the whole market. The Strategy's own 2025 baseline: contracts with an estimated award value of €29.5 billion were awarded across 8,004 advertised competitions; 10,147 suppliers responded to a tender, 8,826 of them SMEs; 2,262 individual suppliers won a contract; 88% of contracts went to SMEs; and 275 central arrangements were live with Central Purchasing Bodies. Two of those figures matter most here. First, the ratio of responders to winners – roughly 10,000 to 2,300 – confirms at national scale the conversion problem this analysis documents within recruitment. Second, the 275 live central arrangements confirm the direction of travel already visible in our tender data: frameworks and panels are the dominant vehicle, and the Strategy's Pillar 5 commits to managing that complexity rather than reversing it.

Pillar 1 is aimed at the long tail. The Strategy commits to easier participation for SMEs and microenterprises, with KPIs on the number and diversity of SMEs competing and winning. Entry barriers are being deliberately lowered; the evidence threshold inside the competition is not – which is where the gap between participating and winning will persist.

The OGP is scoping a central arrangement for AI itself. Buried in the Strategy's actions is a feasibility study for a central procurement arrangement capable of supporting the AI requirements of public bodies. The significance for recruitment firms is second-order but real: public bodies that adopt AI through central arrangements will restructure roles, generate new skills demand, and lean on external supply while internal capability catches up.

The Civil Service is changing how it assesses people – and will expect its suppliers to follow. The Civil Service Capability Framework, launched in 2024 and applied to large-volume competitions from late 2025, replaces the long-standing

€29.5bn

estimated award value of contracts across 8,004 advertised competitions – 2025 baseline

10,147

suppliers responded to a tender; 2,262 won a contract

88%

of contracts went to SMEs

275

central arrangements live with Central Purchasing Bodies

The policy horizon to 2030... continued

competency model: candidates are now scored on potential, values, and transferable skills alongside past performance. Recruitment vendors serving public bodies will increasingly be asked to source, screen, and assess against capability-based criteria rather than conventional competency checklists. Firms that build this into their tender methodologies early hold a genuine, demonstrable differentiator that most competitors cannot yet copy.

Government digital ambitions are creating a new class of public sector skills demand. The Digital Ireland strategy commits to digitalising 100% of key public services by 2030, backed by an AI Advisory Unit for the public service, a National AI Fellowship programme, and a nationwide skilling agenda. Every one of those commitments is, ultimately, a staffing problem. Employer surveys underline the gap: 96% of Irish employers report skills shortages, and just 5% believe they hold the skills to make best use of AI. Specialist technology recruiters positioned for public sector digital delivery are bidding into a structurally expanding category.

Taken together, the policy horizon rewards three vendor behaviours: building capability-framework-literate assessment into recruitment methodologies now; positioning for framework and panel seats rather than one-off contracts; and treating public sector digital and AI skills supply as a named growth vertical, not a subcategory of IT recruitment.

100%

of key public services to be digitalised by 2030 under the Digital Ireland strategy

96%

of Irish employers report skills shortages

5%

believe they hold the skills to make best use of AI

The market behind the market

Why public demand is rising as private hiring stalls.

The 2026 labour market explains the shape of the tender pipeline. The ERF's Q1 2026 Labour Market Monitor (600+ recruitment businesses) found recruiters reporting increased permanent vacancies fell from 52% in January to 28% by March, candidate availability rose, and unemployment ticked up to 4.7% – "not a jobs market in retreat… a jobs market on hold," in the ERF president's words. The same monitor recorded the counter-move: recruiters filling fifty or more temporary roles in a month rose from 9% to 13%. Employers preferring short-term commitments in uncertain conditions is precisely the demand that agency panels exist to serve – a stalling permanent market and €710 million of HSE temporary staffing ceilings are the same phenomenon viewed from opposite ends.

One further current bears directly on procurement demand:

The public – private pay dynamic is pulling talent conversations into procurement. Sustained commentary through 2026 has pressed the case that public sector pay must track private sector trends to deliver recruitment at all. Where direct recruitment struggles, agency supply fills the gap – which is exactly what the HSE panel ceilings quantify. Vendors able to speak credibly about candidate availability and pay benchmarking in their methodology sections are addressing the buyer's real anxiety.

Put the pieces together: private-market softness is increasing candidate availability at exactly the moment public bodies are scaling temporary frameworks, reforming their assessment models, and funding a digital skills build-out. For recruitment firms, the public sector in 2026 is not a counter-cyclical sideline – it is where the structural growth is.

52% → 28%

recruiters reporting increased permanent vacancies, January to March 2026

9% → 13%

recruiters filling fifty or more temporary roles in a month

4.7%

unemployment, Q1 2026

What a pre-submission audit catches

Every pattern described above – the tailoring deficit, the accountability gap, the generic ceiling – is visible in a bid before it goes in.

The difference between reading it in a result letter and reading it a week before the deadline is the difference between a lesson and a fix.

A recent BidReview audit makes the point concretely. A recruitment firm preparing a bid for a shortlisting services competition with a national public body ran its draft through an independent audit before submission. The firm wrote the bid; the audit scored it the way an evaluation board would. The predicted result: 435 out of 1,000 – 44%, squarely mid-band.

The audit's overall finding echoed, almost word for word, the evaluation feedback quoted earlier in this piece: the submission was "compliant and well-structured" but its content "transitions from being merely compliant to being generic" when calibrated against an experienced competitive field. Structure was not the problem. Evidence was. (One scope note: the firm's pricing schedule sat outside the review, so the cost criterion went unscored – the audit assessed the quality sections on which, as this analysis has shown, these competitions actually turn.)

Three specific catches show what an audit does that a read-through by the bid's own authors cannot:

"95% placement success rate" – a claim any competitor can make. The audit applied the same test an evaluator implicitly applies: success at what, measured how? Undefined percentages are the most common form of me-too claim in recruitment bids. The audit's recommendation was not better wording – it was different evidence: time-to-shortlist figures, defined satisfaction measures, verifiable context.

A capacity claim spanning a fivefold range – "100 to 500 applications per day" in the draft under review. A range that wide reads as an estimate, not a capability. The fix was operational, not editorial: state the sustained throughput the firm can evidence, and the surge ceiling separately, with the staffing model behind each – which is precisely what the firm's final

435 / 1,000

predicted score for the audited draft – 44%, squarely mid-band

62%

predicted methodology score – inside the 550–700 band occupied by unsuccessful bidders

3

specific catches a read-through by the bid's own authors would miss

What a pre-submission audit catches... continued

submission did, restating capacity as banded figures per assessor pair. That is the audit loop working as intended: a draft-stage weakness, caught and resolved before the evaluator saw it.

A CV line – "led the delivery of 450 technical roles" – with no context an evaluator can score. Which roles, for what client objective, over what period, against what difficulty? The audit flagged the line as a fact wearing the costume of an achievement. The firm held the underlying detail; it simply had not made it into the document.

Notice where the audit's predicted methodology score landed: 62%, inside the 550–700 band that the unsuccessful bidders in our twenty competitions occupied. The draft was heading, measurably, for the losing cluster – and the reasons were itemised, criterion by criterion, while there was still time for the firm to act on them.

One limitation should be stated as plainly as the findings. This example demonstrates that a weak bid can be identified and scored before submission – it does not, by itself, demonstrate that audited bids go on to win more. That evidence requires a cohort of audited submissions tracked against outcomes over time, and BidReview intends to publish exactly that as the data accumulates. What the example does establish is narrower and still valuable: the

Report extract 1: here is what an evaluator will actually give you

Pre-submission audit: predicted scoring summary (anonymised)

Criterion	Marks available	Predicted score	%
Methodology	300	185	62%
Team	200	125	63%
Contract management	200	125	63%
Cost	300	Not scored*	–
Overall	**1,000**	**435**	**44%**

*Pricing schedule outside review scope. Client and buyer anonymised. Source: BidReview audit report.

What a pre-submission audit catches... continued

losing patterns in this report are diagnosable a week before deadline rather than a month after it.

The broader point is the one this whole analysis keeps returning to. The 250–350 point methodology gap between winners and losers is not a writing gap. It is an evidence gap, and it is diagnosable in advance. The firms stuck at one win are not short of prose; they are short of an independent, evaluator-grade reading of their own submissions before the only reading that counts.

Report extract 2: cross-cutting recommendations

Pre-submission audit: cross-cutting recommendations (anonymised extract)

Finding	Why it costs marks	Fix before submission
“95% placement success rate”, undefined	Any competitor can claim it; evaluator cannot verify or score	Define the measure; evidence time-to-shortlist and satisfaction data
Capacity stated as a fivefold range in the draft	Reads as an estimate, not a capability	State evidenced sustained throughput and surge ceiling, with staffing model
CV line: “led delivery of 450 technical roles”, no context	A fact without scoreable achievement or relevance	Rewrite to challenge–solution–outcome with client objective and timeframe

Representative rows from the audit recommendations table. Source: BidReview audit report.

The AI inflection point

Artificial intelligence is entering procurement, but not in the way most commentary suggests.

A note on evidential weight before this section begins: parts of it are documented fact (recruiter-side adoption figures, the compliance tooling now in use, the OGP's AI procurement action) and parts are directional expectation about where evaluation practice goes next. The text flags which is which; read the forecasts as forecasts.

The narrative around "AI writing proposals" misses the more consequential shift: evaluation itself is changing, and the characteristics that made bids successful under purely human review are being re-weighted.

The recruitment industry itself is well ahead of most sectors on adoption. ERF data from 2026 indicates that 70% of Irish recruitment firms now use AI for content production, more than half use it for candidate sourcing, and 40% have stopped hiring internal staff as automation absorbs work. Meanwhile, employer survey data suggests AI is augmenting roles rather than replacing them – only 4% of employers report AI replacing full job roles. The industry supplying talent is, in other words, automating its own production faster than its clients are. That asymmetry has a direct bearing on tendering: a sector this fluent in generative AI will inevitably deploy it on bid documents – and procurement evaluation is evolving in ways that punish exactly that.

What is actually changing in evaluation

Three developments are worth understanding in depth.

Consistency pressure on subjective scoring. Methodology and delivery-confidence criteria have always been evaluated through individual judgment. Two evaluators reading the same submission can reasonably diverge by 100+ points on a 1,000-point scale,



The AI inflection point... continued

depending on which risks they weight. As procurement bodies adopt structured, tool-assisted evaluation, divergent scores increasingly require explicit justification. The practical effect for bidders: vague claims ("we excel at flexibility") become harder to score generously, because a generous score must now be defended. Specific, measurable claims ("we maintain 15% spare permanent capacity to absorb surge demand") survive scrutiny because they give evaluators something concrete to anchor a score against. The gap we observed between 550–700 methodology scores and 800–900 methodology scores is likely to widen, not narrow, under this regime.

Compliance parsing removes presentation advantage. Historically, a polished, well-designed submission earned an unspoken benefit of the doubt. Automated compliance checking – flagging missing appendices, cost models that don't reconcile with headcount, timelines inconsistent with stated resources – strips this away. A visually impressive bid with an internal inconsistency now gets flagged before a human forms a favourable impression. Vendors whose competitive edge has been proposal craft rather than operational substance are exposed by this; vendors with genuine operational depth benefit, because the playing field tilts toward verifiable content.

Outcome data is closing the loop. The most significant longer-term shift is the correlation of evaluation scores with actual contract performance. Did the vendors who scored highly on methodology deliver on time? Did their cost proposals hold, or did extensions and change requests inflate the final spend? As procurement bodies build this evidence base, evaluation weightings will drift toward criteria that demonstrably predict delivery – and away from those that merely predict good writing. Bidders should expect the definition of a "strong methodology response" to become progressively more operational and less rhetorical.

What this means for bidding strategy

The instinct to use generative AI to draft methodology sections gets the opportunity backwards. If evaluation is becoming better at detecting generic content, mass-producing generic content is a strategy with a shortening shelf life.

The higher-value applications sit upstream of the writing:

Pattern analysis, qualification, and evidence assembly. The raw material for understanding what wins – tender documents, award notices, evaluation feedback – is published in increasingly standardised formats, and analysing twenty competitions with AI assistance is an afternoon's work rather than a fortnight's. The same tooling monitors new notices against a firm's genuine strengths, extracts weightings, and – most valuably – says "don't bid" on poor fits, because opportunistic bidding on ill-matched competitions is where most losses originate. Inside the bid itself, AI's useful contribution is retrieval: assembling the named individuals, real turnaround metrics and case evidence most firms hold in fragments that never reach the bid team in usable form. Generation of plausible prose is the one application evaluation reform is steadily devaluing.

The emerging vulnerability

As evaluation becomes more resistant to rhetoric, the vendors most at risk are those whose win record was built on bid quality outrunning operational quality. Under human-only evaluation, a well-told story could carry a thin delivery model. That arbitrage is closing.

One practitioner response to this argument deserves quoting in full – not least because it proposes a mechanism simpler than anything in this section, sitting unused in most tender processes today:

The AI inflection point... continued

He is right, and the point is complementary rather than contradictory: detection tooling and presentation stages attack the same problem from opposite ends – one tests the document, the other tests the people behind it. Both reward the same firms.

The corollary is that operational honesty becomes a competitive strategy rather than merely a virtue. If a firm genuinely maintains surge capacity, genuinely achieves 21-day fill times, genuinely retains named specialists – those facts are becoming easier to score and harder to counterfeit. The firms that should welcome AI-assisted evaluation are precisely those whose delivery exceeds their proposal-writing polish. On our data, that describes a meaningful share of the eleven single-win firms: operationally credible businesses that have not yet mastered the tender format. Evaluation reform works in their favour.

> *The report's answer to AI-generated bids is better detection. There's a simpler one that's in most tenders but I have not seen used to date. Bring the delivery team in for an in-person presentation and ask them questions. Anyone can produce a polished methodology now; the cost of writing a professional bid has collapsed. What hasn't collapsed is the cost of being able to answer follow-up questions about it. Ask the named account manager how they'd handle a hard-to-fill role at grade, what their actual time-to-shortlist has been, what they'd do in week one. A firm that lived the answers responds differently to a firm that generated them, and every evaluator in the country can tell the difference inside ten minutes. If buyers are worried the written response no longer tells them who they're hiring, a short presentation stage costs an afternoon and settles it.*
>
> — Barry Prost, Chair / Co-Founder, Rent a Recruiter

WHAT TO DO NEXT

A bid strategy for the next twelve months

NEXT 30 DAYS

Immediate

1. **Know where quality marks are actually won.** When bidders resolve to "focus on quality," the disclosed scoring says where: the methodology criterion, and within it three things in order – demonstrated knowledge of the buyer's specific operating context, named individuals with defined accountability, and verifiable performance evidence. Presentation, boilerplate accreditations and generic process descriptions sit at the bottom of the scoring impact.
2. **Analyse your outcome data**: Consolidate feedback from every competition entered – won and lost – and categorise the patterns. Most firms hold this material but have never read it as a dataset.
3. **Map evaluation criteria to actual scoring**: Which criteria moved the needle in your recent competitions? On our data, it is usually methodology, rarely cost.
4. **Audit your standard templates**: If a competitor could submit your methodology section with their logo on it, it isn't a methodology – it's a brochure.
5. **Identify your specialisation**: Which sector, seniority level, or geography do you win in? The data argues strongly for concentrating there.

NEXT 90 DAYS

Medium-term

1. **Build a tender intelligence capability**: Systematically analyse published competitions for evaluation weighting patterns – this is where AI assistance genuinely earns its keep.
2. **Develop vertical-specific methodologies**: Tailored delivery approaches for healthcare, technology, or professional services, each grounded in real operational evidence.
3. **Assemble your evidence base**: Named individuals, verified fill-time metrics, referenceable outcomes – organised so bid teams can retrieve rather than reinvent.
4. **Qualify harder**: Decline competitions that don't fit your operational reality. A disciplined no-bid decision is a competitive weapon.

NEXT 12 MONTHS

Long-term

1. **Build internal analytical capability**: Train your team to use AI for procurement intelligence, not proposal drafting.
2. **Pursue multi-lot positions deliberately**: Two mid-sized framework positions beat one large win for revenue stability and future credibility.
3. **Establish sector authority**: Publish procurement insight in your chosen vertical. Evaluators read the market too.

B1DREVIEW

WHAT TO DO NEXT

The bottom line

Government recruitment procurement is entering a period where methodology outweighs cost, specialisation outperforms breadth, and evaluation is becoming steadily harder to charm.

The market will stratify further over the next 18 months: a small group of specialised vendors holding multiple framework positions and most of the contract value, a middle tier holding two or three frameworks each, and a long tail competing for the remainder. Movement between tiers is entirely possible – the eleven single-win firms in our sample prove that entry happens – but it requires treating tendering as a capability to be built, not a lottery to be entered.

The vendors who win consistently share five habits:

1. **They specialise** – choosing a vertical and building demonstrable depth within it
2. **They document rigorously** – process flows, KPIs, named ownership
3. **They customise substantively** – tailoring to the buyer's operational context, not find-and-replacing the buyer's name
4. **They iterate strategically** – treating every unsuccessful competition as evaluation intelligence
5. **They use AI upstream** – for market analysis and qualification, not for generating prose that evaluation tools are learning to discount

For vendors with one or two wins, the path is clear: invest in methodology quality, choose a specialisation, and compete on delivery confidence rather than price.

The recruitment procurement market of 2026–2027 will look fundamentally different from today's. The question is whether your organisation shapes that change or responds to it.

18 months

over which the market will stratify further

11

single-win firms in our sample – proof that entry happens

Find out what your bid will score before the evaluator does.

Run the free scorecard →

What BidReview is

This report is published by BidReview, and since the platform is new to the market, it should be introduced rather than assumed.

BidReview.ai is an AI platform that audits tender responses before they are submitted. A bid team uploads its draft response together with the buyer's tender documents; BidReview evaluates the draft the way an evaluation board will – against the buyer's own published criteria, weightings and scoring bands – and returns a predicted score, a compliance check, and specific, evidence-level recommendations while there is still time to act on them. The audit worked example earlier in this report is an anonymised BidReview output.

It does not write bids, and the distinction matters. Generative tools that produce bid text are feeding evaluation processes increasingly designed to discount generated prose. BidReview sits on the other side of the table: it reads, scores and challenges a firm's own submission, testing it against the losing patterns documented in this report before an evaluator ever sees it.

The platform launched as a self-serve product in April 2026. Within thirty days it was named IT Project of the Year (SME) at the Tech Excellence Awards and won the Newstalk Changemaker Business Awards 2026 for procurement process innovation.

April 2026

launched as a self-serve product

2 awards

within thirty days: IT Project of the Year (SME), Tech Excellence Awards; Newstalk Changemaker Business Awards 2026

About the author

Tony Corrigan, founder, BidReview.ai

Tony Corrigan is the founder of BidReview.ai and has spent three decades applying AI to procurement problems. He previously founded TenderScout (later Orbidal), which supported more than 3,000 tender competitions and trained over 500 Irish SMEs, and has advised on hundreds of public and private sector procurement engagements. He holds the CF APMP qualification and continues to sit as an evaluator on live public sector tender panels – reading bids from the same side of the table as the buyers this report analyses.

A regular commentator on the Irish procurement market, he has published in the Irish Independent and Business Post, spoken at Dublin Tech Summit, BPC Europe (Amsterdam) and APMP London, and delivers ongoing webinar series aimed at widening SME and micro-business participation in public procurement. He mentors on the InterTradeIreland panel and is a member of the SFA and Guaranteed Irish.



About the analysis

This analysis examined:

- **7,873 companies** across the Irish and Northern Irish public procurement markets, including a consolidated register of roughly 350 recruitment firms across both jurisdictions
- **200 recruitment tender notices** published January 2023 – August 2026 by 114 Republic of Ireland contracting authorities, with disclosed estimated values exceeding €1 billion
- **94 Northern Ireland recruitment contract awards** across 50 winning firms, dominated by the Central Procurement Directorate
- **20 major recruitment procurement competitions** (January – June 2026) in detail, plus a pre-submission audit case study
- **63 published Republic of Ireland recruitment contract awards** totalling €27.4M

Market and policy context draws on the National Public Procurement Strategy 2026–2030, the Office of Government Procurement's Public Service Spend and Tendering Analysis, the OECD's Procurement for Better Value case study of Ireland, the LEEF Shared Island all-island labour market study, the Employment and Recruitment Federation's Q1 2026 Irish Labour Market Monitor, FRS Recruitment's Employment Report 2023–2026, Hays' 2026 Salary & Recruiting Trends research (including its Northern Ireland sample), VANRATH's Northern Ireland market analysis, Sigmar's Irish legal market analysis, NISRA's Work Quality in Northern Ireland statistics, the Government's Digital Ireland strategy, analysis of the Civil Service Capability Framework transition, and contemporary parliamentary and press reporting of HSE agency expenditure (2024–2026).

The core dataset is built from published contract award notices (eTenders, eTendersNI and Tenders Electronic Daily) and captures the openly competed layer of the market; the fuller treatment of what that does and does not include is in "A Note on What This Data Captures" above. In short: published values are a floor, advertised ceilings a maximum, and the competitive findings are unaffected by either limitation.

Companies named in the league tables appear solely on the basis of published contract award notices, which are public record. All content derived from private evaluation correspondence and pre-submission audit material has been anonymised. The patterns and insights are based on actual tender outcomes, procurement body feedback, and evaluation criteria from public sector employers including ComReg, the Higher Education Authority, the Health and Safety Authority, and the Mental Health Commission.

3

notice sources: eTenders, eTendersNI and Tenders Electronic Daily

c. 350

recruitment firms in the consolidated two-jurisdiction register

31 Aug 2026

data cut-off for the award and notice datasets

Terms used in this report

Framework agreement / panel – an arrangement under which a buyer appoints one or more suppliers for a fixed period (typically up to four years; longer in some cases) and then buys from them as needs arise. Being appointed is not the same as being paid: revenue flows through the drawdowns.

Call-off / drawdown – an individual purchase made under a framework. Call-offs are rarely published separately, which is why a framework holder's visible win count understates its actual business.

Mini-competition – a contest run only among the suppliers already appointed to a framework, used to award a specific call-off where the framework allows reopening of competition.

Single-supplier framework without reopening – a framework awarded to one firm, under which the buyer draws down directly with no further contest for its full term – the strongest position a supplier can hold, and the hardest to displace.

Contract notice vs award notice – a contract notice advertises a competition; an award notice records its result. Award notices name winners but do not always disclose values, and many purchases never generate either.

MEAT / MAT – the award tests in the two jurisdictions. The EU's Most Economically Advantageous Tender (used in the Republic) and the UK's Most Advantageous Tender (in force in Northern Ireland since February 2025) both balance quality and cost, but the UK regime gives buyers wider discretion in setting criteria.

Ultimate Cost – a common Irish scoring method in which every bidder's price is scored relative to the lowest price received, so the cheapest compliant bid takes maximum cost marks and everyone else is scaled against it. This is the mechanism that lets aggressive pricing manufacture large scoring gaps.

Qualifying mark / minimum threshold – a floor score (often 60% on a quality criterion) below which a bid is eliminated regardless of its price.

CPV code – the EU's Common Procurement Vocabulary, the classification system attached to every notice. Imperfectly applied in practice: the Courts Service's recruitment framework, for instance, is classified under IT services.

Estimated value / ceiling – the maximum a framework may be worth over its life, published at notice stage. A ceiling is not committed spend; actual drawdowns may be far lower.

DPS (Dynamic Purchasing System) – a framework-like arrangement that stays open to new suppliers joining throughout its life, unlike a closed framework.

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2026

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