

1. Figure



# FLASH REPORT

HUNGARIAN PUBLIC PROCUREMENTS IN NUMBERS

H1 OF 2026

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## INTRODUCTION

The Public Procurement Authority celebrated its 30th anniversary in 2025. The National Assembly established the Authority's legal predecessor, the Public Procurement Council in 1995, simultaneously with the adoption of Act XL of 1995 on Public Procurement. For more than three decades now, the Authority has been working tirelessly to ensure that public procurements are conducted lawfully – to this end, it controls tens of thousands of notices every year, examines notifications for launching negotiated procedures without prior publication, supports practitioners by issuing expert opinions and guidelines, and monitors the performance and amendment of public contracts concluded.

The Authority has been collecting statistical data on public procurements for the whole year since 1996 and publishes data on domestic public procurement. The statistics are based on the one hand on contract award notices and on the other hand, on the results of the Authority's performance of its tasks, such as notice control, contract control and legal review procedures. During the monthly processing of the data received, the Public Procurement Authority performs the quality control, cleansing, correction, replacement and systematization of the data. As part of this activity, the Authority continuously documents and improves its data production process; furthermore, special emphasis is laid on the continuous IT development of data processing.

Pursuant to Act CLV of 2016 on Official Statistics, an entity may pursue official statistical activities if it publishes official statistical data as part of its public task and the organization and operation of which complies with the principles set out in the Practical Code of National Statistics. The Authority is the first entity that voluntarily joined the Official Statistical Service. The accreditation procedure conducted by the Central Statistical Office (KSH) was successfully completed in 2020, and then in 2025, the KSH again accredited the Authority's statistical activities. As the result, the Public Procurement Authority is the only organization that provides credible and reliable public procurement statistics in Hungary in accordance with a transparent, consistent methodology. The data and publications processing public procurement statistics are available on the Authority's website. In addition to its mandatory tasks set forth by the Public Procurement Act, the Public Procurement Authority actively contributes to providing comprehensive responses to statistical inquiries from various entities, thereby helping to inform the public, practitioners and decision-makers.

As of the first half of 2024, the Public Procurement Authority prepares the Flash Reports pursuant to a new statistical methodology, based on contract award notices related to the lots of the procedure effectively concluded with a contract. The legal requirement currently only affects procedures conducted above EU thresholds; however, the Authority publishes its statistics on a contractual basis also in terms of public procurement procedures conducted below EU thresholds.

## I. THE VOLUME OF HUNGARIAN PUBLIC PROCUREMENTS<sup>1</sup>

### 1. The number (pcs) and value (HUF bn) of effective public procurement procedures<sup>2</sup> and public contracts<sup>3</sup> in H1 of 2024, 2025 and 2026



In the first half of 2026 contracting authorities conducted in total 3739 effective public procurement procedures amounting to HUF 1866,5 billion. Pursuant to the contract-based calculation methodology this meant the conclusion of altogether 8288 public contracts, the total value of which was HUF 1877,8 billion.

In H1 of 2026 the number of effective public procurement procedures advanced by 8,5 percent, while the number of public contracts concluded also grew by 7,2 percent compared to the same period of the previous year. Thus, both indicators were close to the level measured in the first half of 2024. However, the value of procedures and contracts lowered by about one third compared to the same period of the previous year, still, they were 14-15 percent above the values in the first half of 2024.

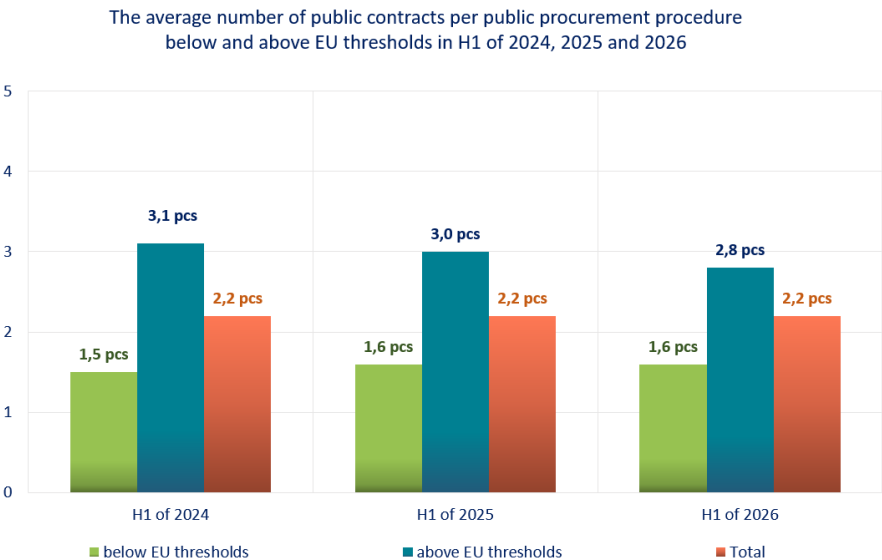
The total value of public contracts concluded exceeds the data of the value of effective public procurement procedures because at the end of the first half of 2026 there were 33 public procurement procedures divided into lots in progress, in the case of which the contract was already concluded concerning certain lots, but which had not yet been completed in terms of all lots. The total value of the contracts concluded concerning the already completed lots amounted to HUF 11,3 billion, while the data on the value of lots still in progress will be available later, after the publication of contract award notices.

<sup>1</sup> The statistics is prepared based on contract award notices related to certain lots effectively concluded with contract. In line with the statistical practice of the EU, contracts concluded as the result of procedures aimed at the conclusion of framework agreements (framework agreements) are not included, only the data of contracts based on effective framework agreements.

<sup>2</sup> Procedure/public procurement procedure shall mean effective, complete public procurement procedure (even having several lots), not aimed at the conclusion of framework agreements.

<sup>3</sup> Contract shall mean contracts related to effective procedural parts not aimed at the conclusion of framework agreements.

2. The average number (pcs) of public contracts per public procurement procedure above and below EU thresholds in H1 of 2024, 2025 and 2026

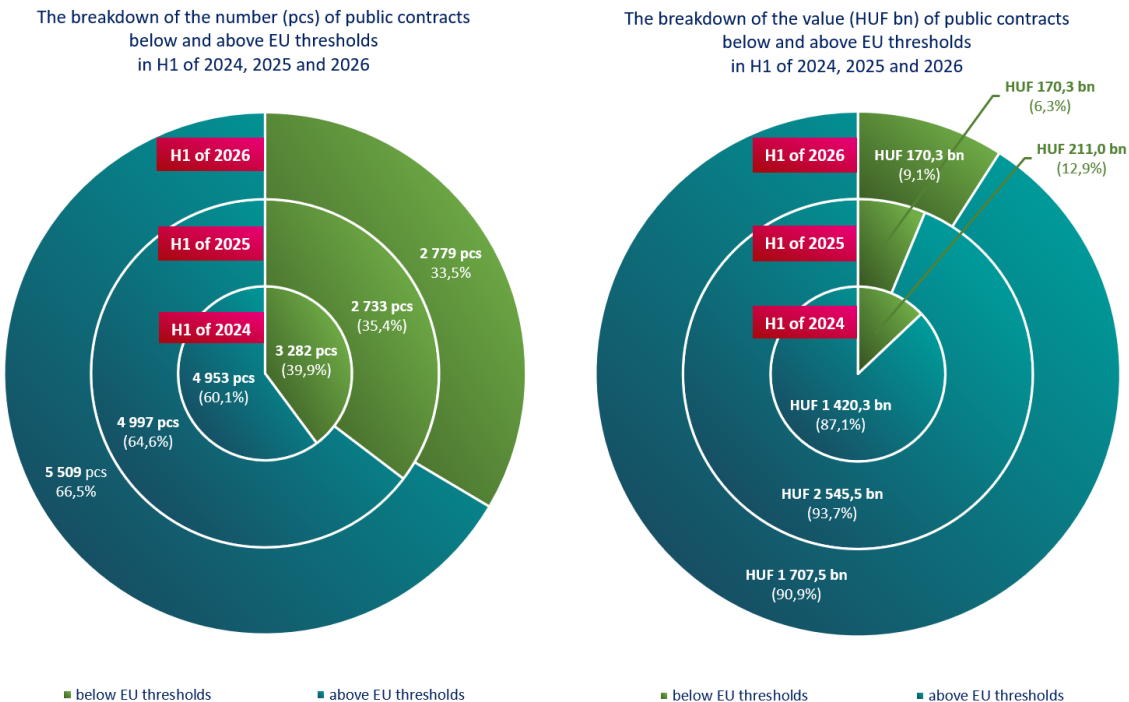


In H1 of 2026 the average number of public contracts concluded per public procurement procedure was 2,2, similarly to the level measured in the same periods of the past two years.

Based on the average of the first halves in 2024–2026 the average number of public contract concluded per public procurement procedure above EU thresholds was 3, although this indicator slightly decreased year by year from 3,1 to 2,8. Below EU thresholds the average number of public contract per public procurement procedure in the three semesters in question remained nearly at the same level, amounting to an average of 1,6, which equals the value calculated in the first half of 2026.

Based on the data it can be concluded that contracting authorities apply the division into lots twice more frequently in higher value public procurements above EU thresholds than below EU thresholds, which practice promotes the stimulation of competition.

3. The breakdown of the number (pcs) and value (HUF bn) of public contracts above and below EU thresholds in H1 of 2024, 2025 and 2026

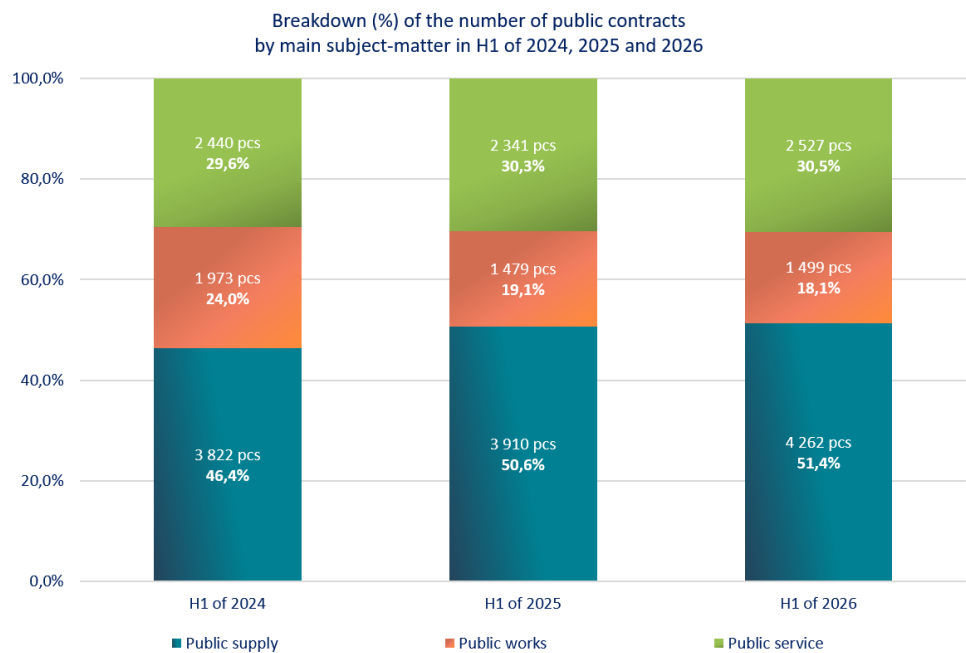


In H1 of 2026 about one third of the public contracts was concluded below EU thresholds, while roughly two thirds above EU thresholds. This breakdown followed the trend detected in the same periods of the previous years, the ratio of the number of contracts related to public procurements conducted above EU thresholds still dominates and gradually intensified in the reporting period.

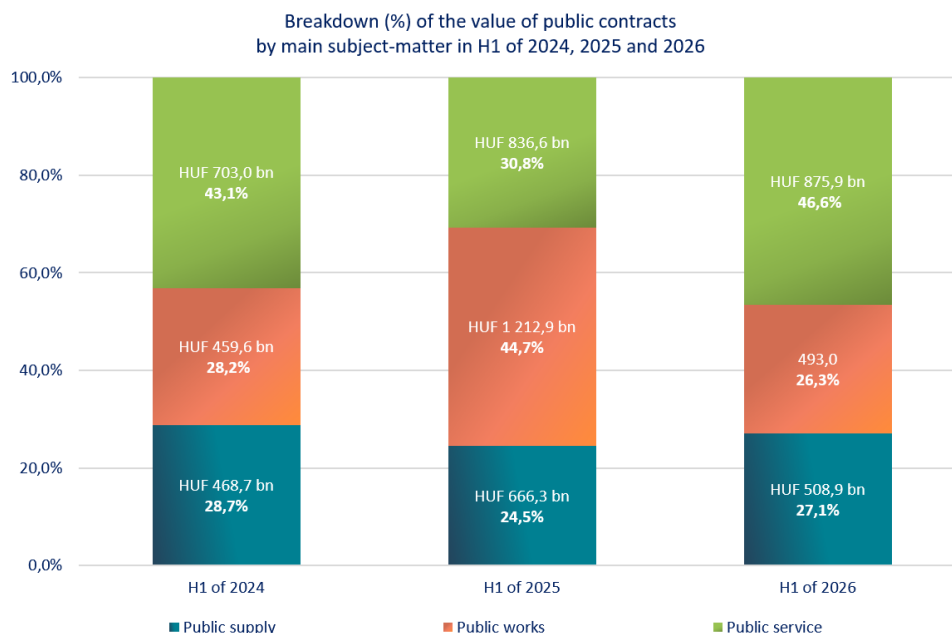
Upon looking at the breakdown of public contracts by value in the first half of this year, similarly to the first semester of the past year, the vast majority of the contracts, over 90 percent was related to procedures conducted above EU thresholds.

More specifically, based on the data of the Public Procurement Authority in the first half of 2026 in Hungary, like in the same periods of the previous years, contracting authorities conducted the substantial majority of public procurements above EU thresholds, considering both the number and value of public contracts.

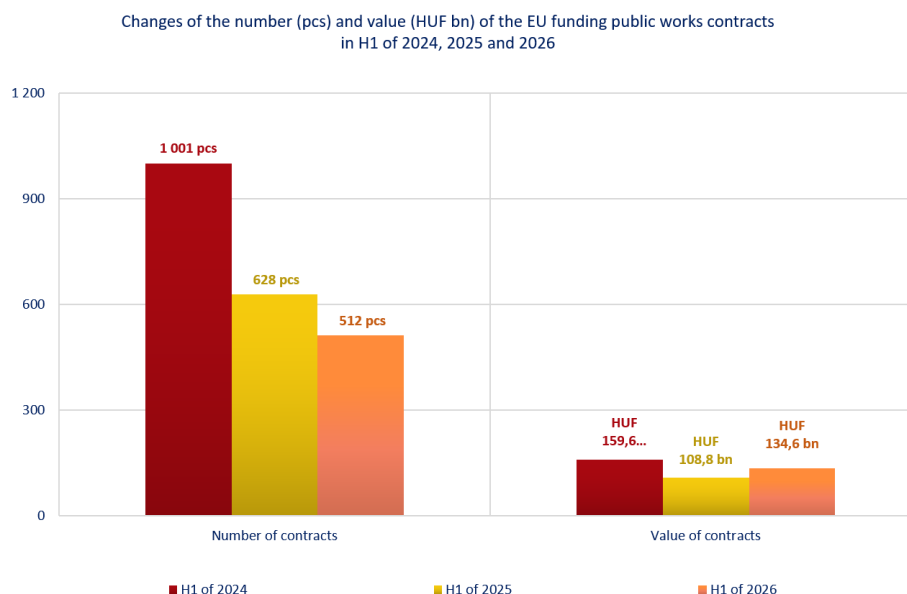
4. The breakdown of the number (pcs) and value (HUF bn) of public contracts by subject-matter in H1 of 2024, 2025 and 2026



Upon looking at the number of public contracts, in H1 of 2026 public supply accounted for the highest share, over half of the contracts was related to this subject-matter. The ratio of public services was little over 30 percent, while public works represented less than one fifth of the public procurements, only 18,1 percent. Therefore, the trend since the same period of 2024 has been continued: the ratio of public supply slightly expanded, that of public works weakened a bit, while the level of public service did not change substantially.



It can be concluded based on the breakdown of public contracts by value that in H1 of 2026 the value of spending related to public services was the highest, almost half of the total value, about 46,6percent was related to this subject-matter. Public supply accounted for 27,1 percent of the total value, while the ratio of public works was the lowest also in terms of value, a bit more than one fourth of the total value, 26,3 percent represented this subject-matter. Overall, the breakdown of the value in H1 of 2026 resembles the structure seen in the first half of 2024. Compared to the data in the first semester of 2025, the value ratio of public service and public works actually switched, while the ratio of the cost of public supply stayed at similar level in all three periods in question.



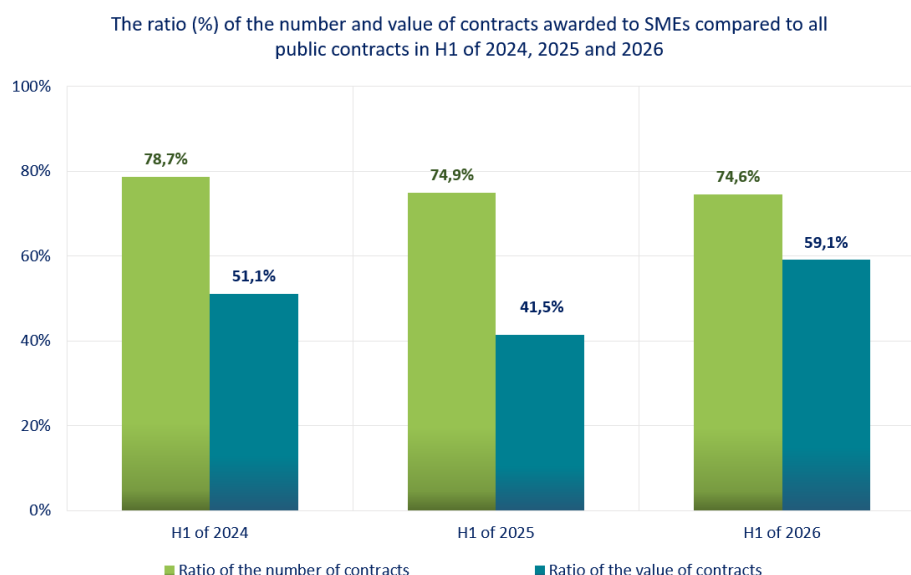
In H1 of 2026 contracting authorities concluded 1499 public works contracts, which indicates 1,4 percent advance compared to the value in H1 of 2025. Nevertheless, the number of contracts still lags behind the level in H1 of 2024, it just reached three quarter of the level measured that time.

In the first semester of 2026 the value of public works contracts exceeded the level measured in the same period of 2024 by 7,3 percent. At the same time, there was a considerable downturn compared to the peak value seen in 2025: this year’s data reached only 40 percent of the data that time.

In the first semester of 2024, the value per one contract in terms of public works reached HUF 232,9 million, while it increased to HUF 328,9 million in the first half of 2026, which constitutes a 41,2 percent growth.

## II. THE ROLE OF THE SME SECTOR

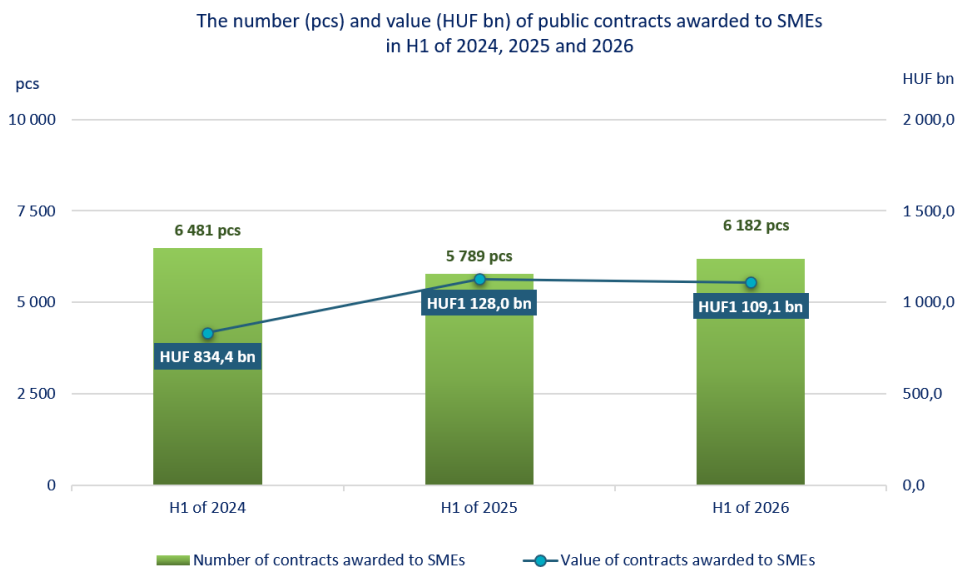
### 1. The ratio of public contracts awarded to SMEs in H1 of 2024, 2025 and 2026



In H1 of 2026, almost three quarters of public contracts, furthermore, nearly 60 percent of the total value was awarded to SMEs, meaning that 75 out of 100 public contracts and 59 out of each 100 forints spent were awarded to SMEs.

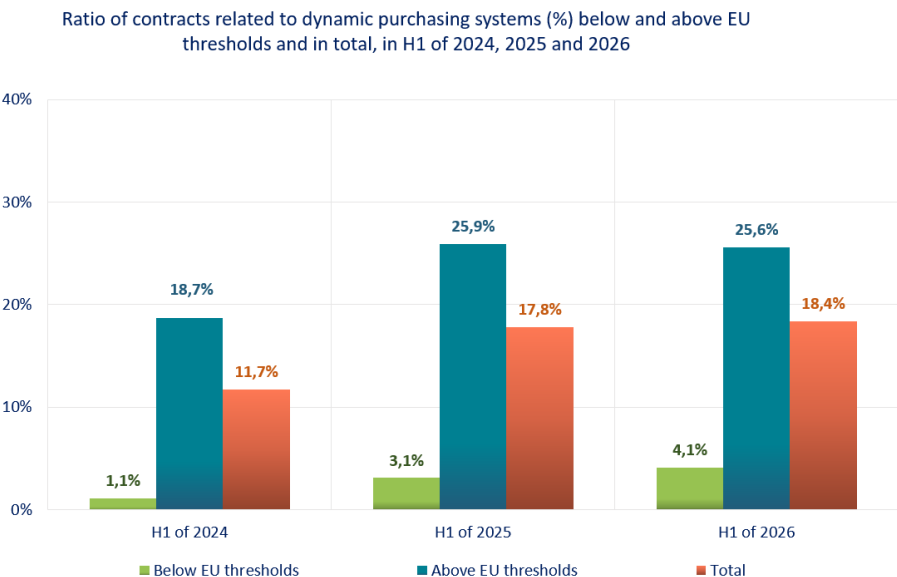
The ratio of the number of public contracts awarded to SMEs in H1 of 2026 remained at the level of the same period of the previous year. Nevertheless, a significant, over 17,6 percentage points increase can be seen in terms of the value ratio of the contracts. The reason for this is that the value of public contracts awarded to SMEs decreased by just 1,7 percent over the past year, while the value of all contracts shrunk considerably, by nearly one third.

2. The number (pcs) and value (HUF bn) of public contracts awarded to SMEs in H1 of 2024, 2025 and 2026



In H1 of 2026 in total 6182 public contracts were awarded to SMEs, amounting to nearly HUF 1110 billion. The number of contracts awarded to SMEs intensified by 6,8 percent compared to the same period of the previous year, the related total value stayed at the level measured in H1 of 2025. This showcases that the SME sector continues to play a crucial role in the public procurement market.

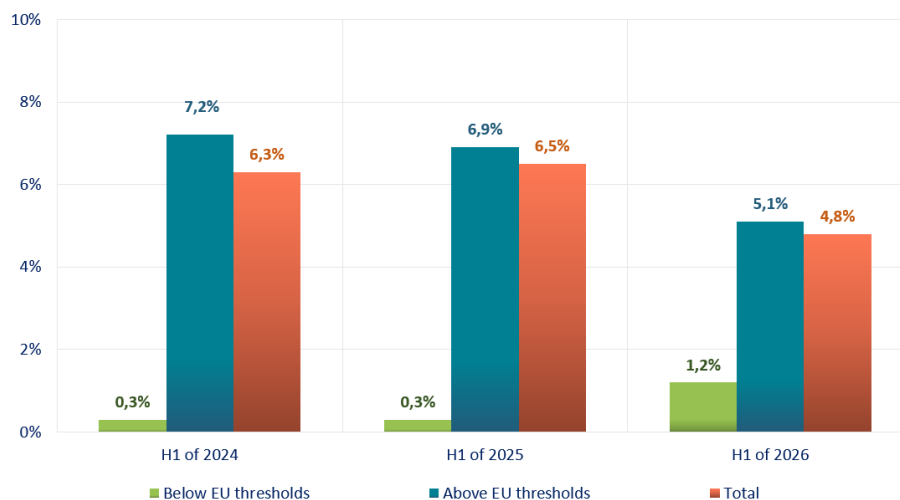
3. The ratio of the number and value of public contracts<sup>4</sup> related to dynamic purchasing systems in H1 of 2024, 2025 and 2026



The dynamic purchasing system (DPS) is a flexible purchasing method in the field of public procurements, which in contrast to framework agreements is open to new suppliers during its entire period and which is used by contracting authorities mainly for their routine, repeated procurements. Contracting authorities have been applying DPS more and more often since 2023, especially above EU thresholds. In Q1 of 2024, over 10 percent (11,7%) of all public contracts were concluded in DPS, while in H1 of 2026 this ratio exceeded 18 percent. Above EU thresholds contracting authorities conducted every forth of their procurements in DPS in the first half of 2026, similarly to the same period of the past year. Below EU thresholds the ratio of the number of contracts concluded in DPS is under 5 percent, however, there was a clearly increasing trend in the reporting period.

<sup>4</sup> In terms of dynamic purchasing systems, it has to be considered that as the result of the procedures framework agreements may also be concluded, which are although included in the statistical data as DPS based contracts, but due to their special features they do not always entail real fulfilment or the value of the implemented calls may be less than the framework amount laid down in the contract.

Ratio of the value of contracts related to dynamic purchasing systems (%) below and above EU thresholds and in total, in H1 of 2024, 2025 and 2026



The value ratio of contracts related to dynamic purchasing systems lowered in total in the reporting period. This may be due to that the vast majority of these procurements, 90-95 percent are although conducted above EU thresholds, they still represent a lower value. Below EU thresholds an adverse, slight change took place, the value ratio grew by 0,9 percentage points. In H1 of 2024-2026 the value ratio of contracts related to DPS was 5,9 percent on average compared to all contracts.

### III. COMPETITION IN THE PUBLIC PROCUREMENT MARKET

The Public Procurement Authority continuously monitors several indicators routinely in its reports to measure the intensity of competition in the public procurement market.

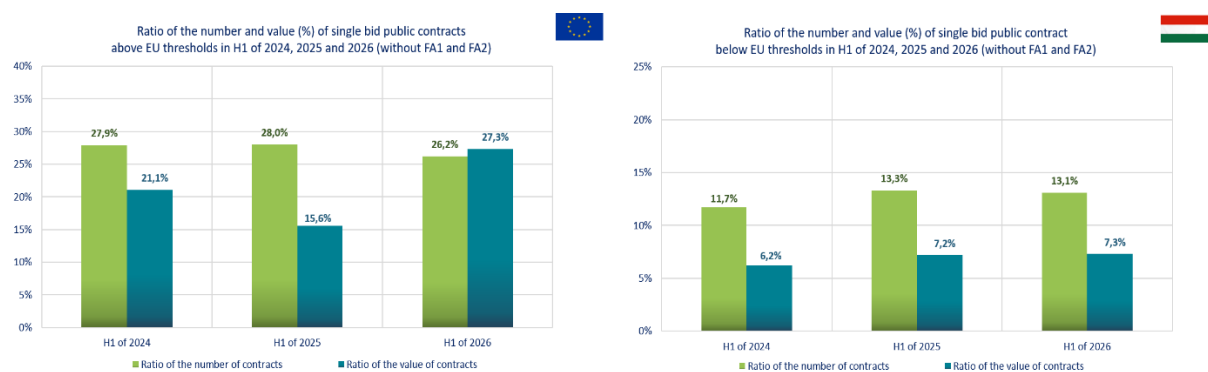
Out of these, the tendency of **single bid public procurement** is one of the most crucial indicators, which is the most sensitive, yet twofold index of the intensity of competition. If just one bid is submitted in a procedure, this may suggest the lack of market competition, the narrowing of the market or even the existence of structural problems. However, on the other hand, the higher value of the indicator may also imply that due to the special features of the activity, the possibilities of competition are a priori restricted in the given market, and the low number of competitors is a natural market characteristic – for example in narrow, highly specialised sectors.

The other key indicator monitored is the **ratio of negotiated procedures without prior publication**, which is also a critical index of the intensity of competition and the openness of public procurement procedures. Based on long-term tendency investigations, it can be stated that as the result of legislative and control interventions, the number of such procedures significantly decreased in the past years.

To evaluate the situation of market competition, as a **third key indicator** the flash report also monitors the **number of bids per contract**. This indicator also illustrates the openness of the public procurement market and the actual intensity of the competition. The changes of the indicator well demonstrate how active tenderers are and to what extent they consider the public procurement market to be an attractive, accessible opportunity.

Altogether the aggregated analysis of the above three indicators enables the comprehensive evaluation of public procurement competition and the long term, well-founded investigation of the impacts of legislative and market trends.

1. Data<sup>5</sup> of the number and value of single bid public contracts in H1 of 2024, 2025 and 2026



In H1 of 2026 the ratio of the number of single bid contracts concluded above EU thresholds, lowered compared to the same period of the previous year, from the earlier 28,0 percent to 26,2 percent. In contrast, the ratio of their value significantly expanded by 11,7 percentage points, thus rising from 15,6 percent in the first half of 2025 to 27,3 percent.

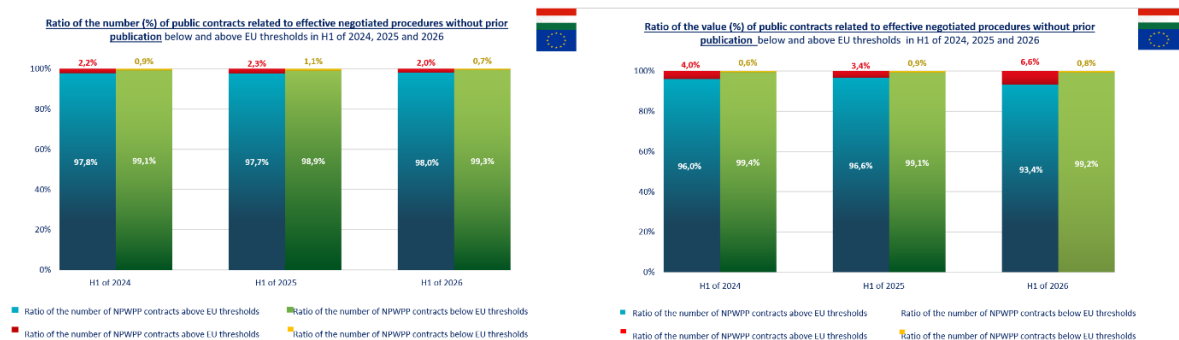
Below EU thresholds the proportion of single bid contracts remained stable compared to the first six months of the previous year: the quantitative ratio minimally shifted from 13,3 percent to 13,1 percent, while the value ratio reached 7,3 percent compared to the earlier 7,2 percent.

So the latest data suggests the standstill of the quantitative ratio of single bid public contracts, nevertheless, currently there is not yet enough time series information available to decide whether this is a constant switch of tendency or just an interim phenomenon.

<sup>5</sup> The statistics on single bid public contracts prepared by the European Commission includes neither the data of contracts aimed at the conclusion of framework agreements (framework agreements: FA), nor the data of contracts related to the lots under effective framework agreements.

In terms of public contracts concluded above EU thresholds, as of 25 October 2023 contract award notices enable the exact identification of public contracts related to the partial performance of framework agreements, thus these are not displayed in the chart in line with the methodology of the European Commission. Below EU thresholds the charts of single bid contracts display the estimated data without contracts related to the partial performance of framework agreements.

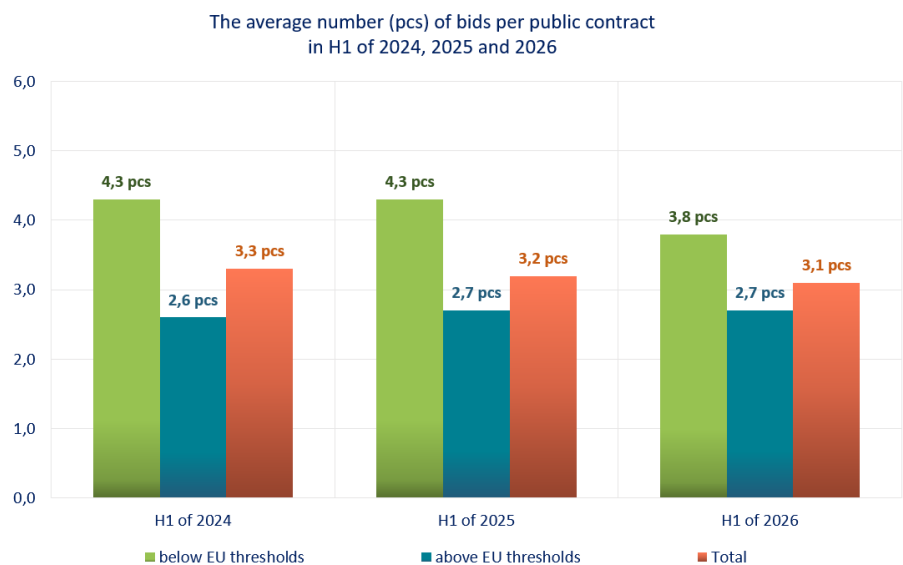
2. The key indicators of public contracts related to negotiated procedures without prior publication completed, in H1 of 2024, 2025 and 2026



The other key indicator of competition in the public procurement market is the tendency of public contracts related to negotiated procedures without prior publication effectively completed.

In H1 of 2026 I the ratio of the number and value of public contracts related to negotiated procedures without prior publication below EU thresholds remained at low level compared to all public contracts. The quantitative ratio changed to 0,7 percent, while the value ratio to 0,8 percent, thus neither of the indicators reached 1 percent. The significance of contracts related to negotiated procedures without prior publication concluded above EU thresholds moved in the opposite direction compared to the same period of the previous year. The ratio of their number slightly weakened from 2,3 percent to 2,0 percent; the ratio of their value intensified from 3,4 percent in the first half of 2025 to 6,6 percent. By now, the value of the indicators stabilised around the equilibrium influenced by the market and the control activity.

3. The average number of bids per public contract in H1 of 2024, 2025 and 2026



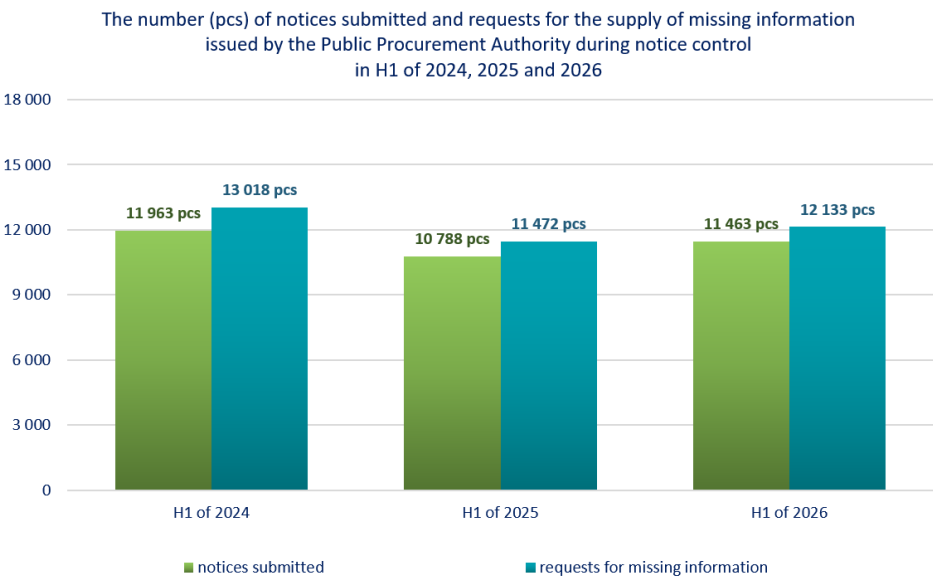
The intensity of public procurement competition is well indicated by the average number of bids submitted per one public contract.

In H1 of 2026 the willingness of participation by tenderers remained unchanged above EU thresholds, as the number of bids per contract equalled the average of 2,7 measured in the same period of the previous year. Conversely, there was a slight drop below EU thresholds, from the level of 4,3 seen in the past two years to 3,8.

In terms of all public contracts above and below EU thresholds, the average number of bids was 3,1 in the first half of 2026. This figure confirms that competition continues to be balanced and contracting authorities can typically select the most suitable tender out of an average of three bids.

IV. CONTROL ACTIVITY

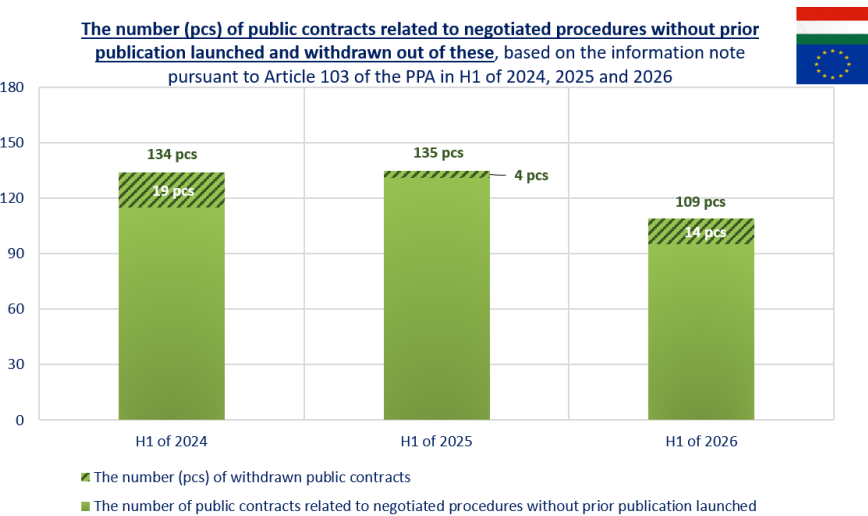
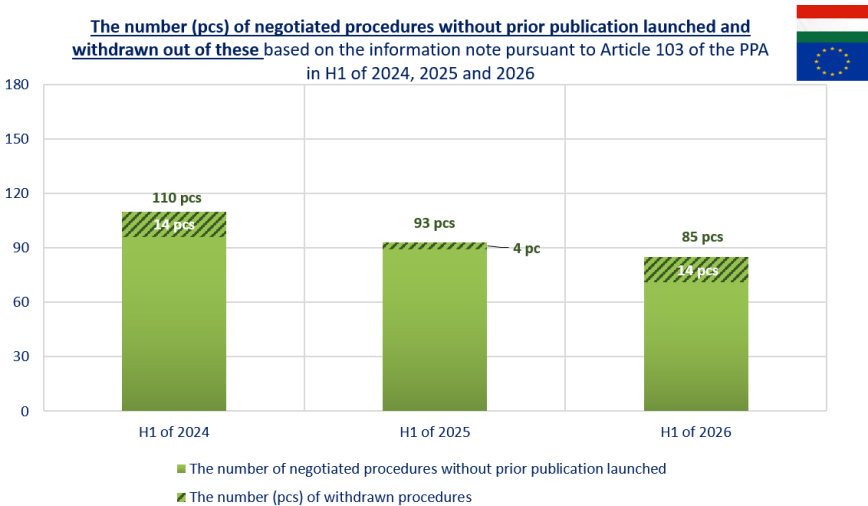
1. Data on the number of notices related to public procurement procedures in H1 of 2024, 2025 and 2026



In H1 of 2026 the amount of the notices received by the Public Procurement Authority was in total 11463, which is a slight increase compared to the same period of the previous year, but lags behind the level two years ago. The Public Procurement Authority continues to pay special attention to the control processes, which ensure that notices are published in compliance with the provisions of public procurement legislation and that their content is in a coherent and clear format.

The number of requests for the supply of missing information issued during the control advanced to 12133 in the first half of 2026 compared to the past year. The volume this year again exceeded the total number of notices, which demonstrates the continuously strict and consistent control practice.

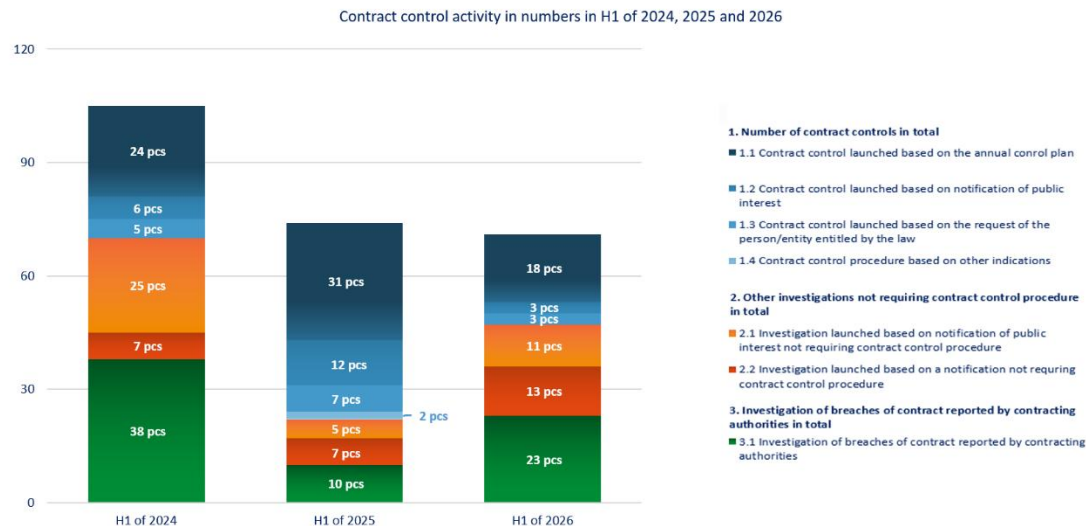
2. The number of negotiated procedures without prior publication launched and withdrawn out of these and the number<sup>6</sup> (pcs) of public contracts related to negotiated procedures without prior publication in H1 of 2024, 2025 and 2026



Overall, the number of negotiated procedures without prior publication launched remained at a very low level, upon considering the same periods of the three years in question. In H1 of 2026 in total 85 negotiated procedures without prior publication were launched, which significantly lags behind the level of 110 two years ago. In the first half of 2026, owing to the strict compliance control, contracting authorities withdrew 14 invitations to tender launching negotiated procedures without prior publication. Simultaneously, the number of public contracts related to the procedures launched reached 109, which is almost 20 percent lower than the135 calculated in the first semester of the previous year.

<sup>6</sup> Statistical data collection is based on the information notes submitted to the Public Procurement Authority by contracting authorities pursuant to Article 103 of the PPA.

### 3. Data on the contract control activity in H1 of 2024, 2025 and 2026<sup>7</sup>



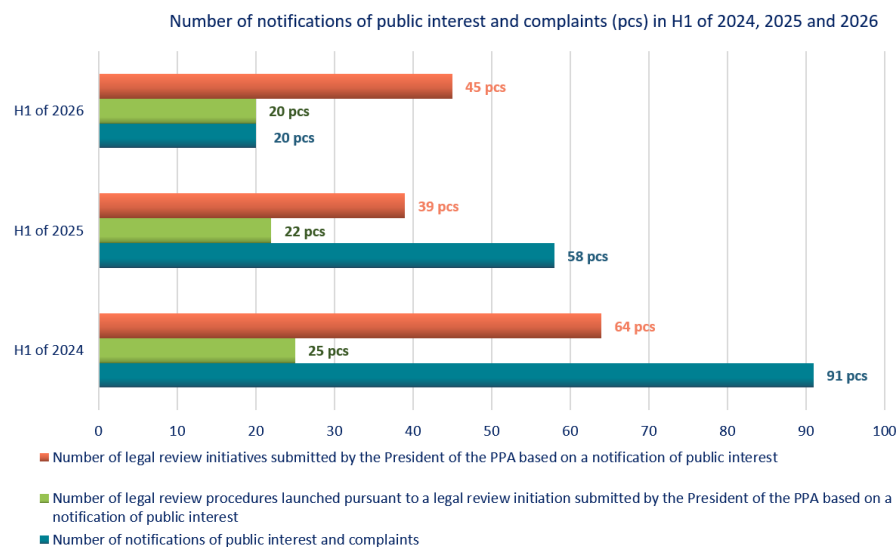
The direct aim of the contract control activity is to reveal public procurement infringements and to support the application of the related legal consequences. The control covers three main case types: contract control procedure, other investigation not requiring contract control procedure and investigation of breaches of contracts reported by contracting authorities. In its Flash Report 2025, the Public Procurement Authority modified the category system of contract controls launched, as a result, a subcategory titled “Contract control procedure based on other indications” (1.4 category) was introduced. The data for 2025 are displayed based on this modified category system; consequently, values of certain data categories may deviate from the values published earlier.<sup>8</sup>

The number of contract control procedures launched lowered from 52 in the first half of 2025 to 24 in the first half of 2026, so the ratio of this case type dropped from 70,3 percent to 33,8 percent within the contract control activity. Nevertheless, after the downturn in 2025 (12 pieces), the number of other investigations not requiring contract control procedure doubled in the first half 2026 and reached 24. So, this case type accounted for 33,8 percent of all contract control activity, in equal ratio as contract controls launched. The number of breaches of contracts reported by contracting authorities increased from 10 in the first half of 2025 to 23 in the first semester of 2026. Consequently, this case type represented nearly one third (32,4%) of the entire half year’s contract control activity.

<sup>7</sup> Data refer to cases launched in the reporting period and exclude cases in progress, potentially carried over from the previous years.

<sup>8</sup> The Public Procurement Authority introduced the subcategory “Contract control procedure based on other indications” (1.4 category) in its Flash Report 2025. The new category was retrospectively introduced back to the start of the year in terms of data in 2025, so data in the categories 1.1, 1.2 and 1.3 for 2025 may deviate from the values published earlier. There is no data available for the year 2024 in this category. The goal of the new category is to describe the control activity more transparently and more precisely.

4. Data<sup>9</sup> on notifications of public interest and complaints in H1 of 2024, 2025 and 2026



The investigation of notifications of public interest and complaints is a key tool for the Public Procurement Authority to ensure transparency and reveal corruption risks. To this end, the Authority pays special attention to the substantial investigation of the notifications received, furthermore, to take the necessary measures in justified cases based on such notifications.

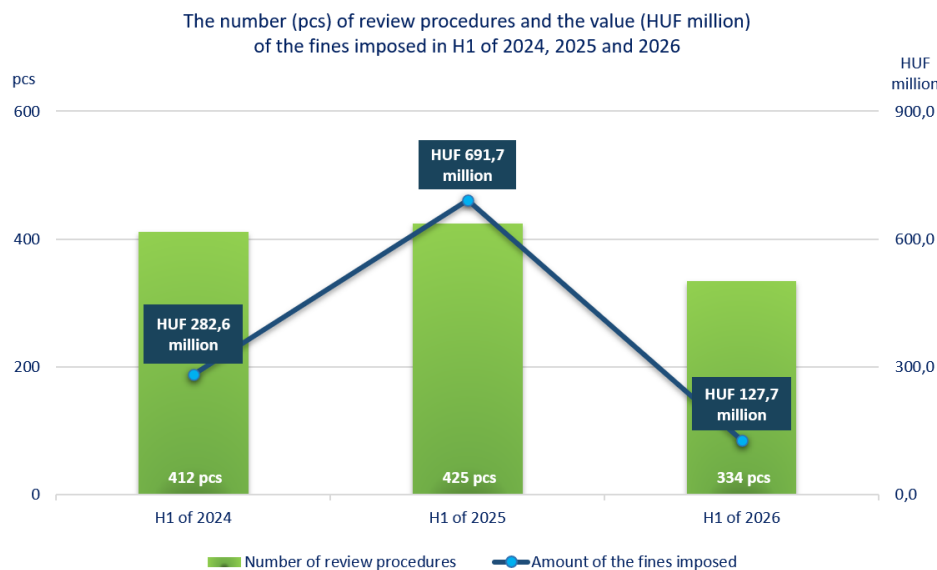
In H1 of 2026 in total 45 notifications of public interest were submitted to the Authority, which means 15,4 percent growth compared to the 39 pieces calculated in the same period of the previous year, however, this data still lags behind the 64 pieces in the first semester of 2024. Upon the substantial investigation of notifications of public interest, the President of the Authority submitted 20 initiations for legal review, which is close to the level in the first half of 2025 (22 pieces). 20 legal review procedures were launched based on the initiations in the first semester of 2026, which value is lower than in the same periods of the past two years.

The Authority publishes the key information related to the notifications of public interest following the closure of the related investigation, by providing for the anonymity of the whistle-blower, if necessary.

<sup>9</sup> Information on the methodology for calculating data on notifications of public interest:  
*Notifications of public interest:* based on the date of receipt of the notifications by the Authority (date of receipt), regardless of whether a given notification concerned one or more public procurement procedures or public contract.  
*Legal review procedures launched pursuant to a legal review initiation submitted by the President of the Public Procurement Authority based on a notification of public interest:* based on the date of the submission of the ex officio legal review initiative by the President of the Authority to the Public Procurement Arbitration Board, regardless of the date of receipt of the public interest notification by the Authority.  
*Legal review initiations submitted by the President of the Public Procurement Authority based on a notification of public interest:* based on the date of submitting the ex officio initiation of the legal review to the Public Procurement Arbitration Board by the President of the Authority, regardless of when the public interest notification was received by the Authority.

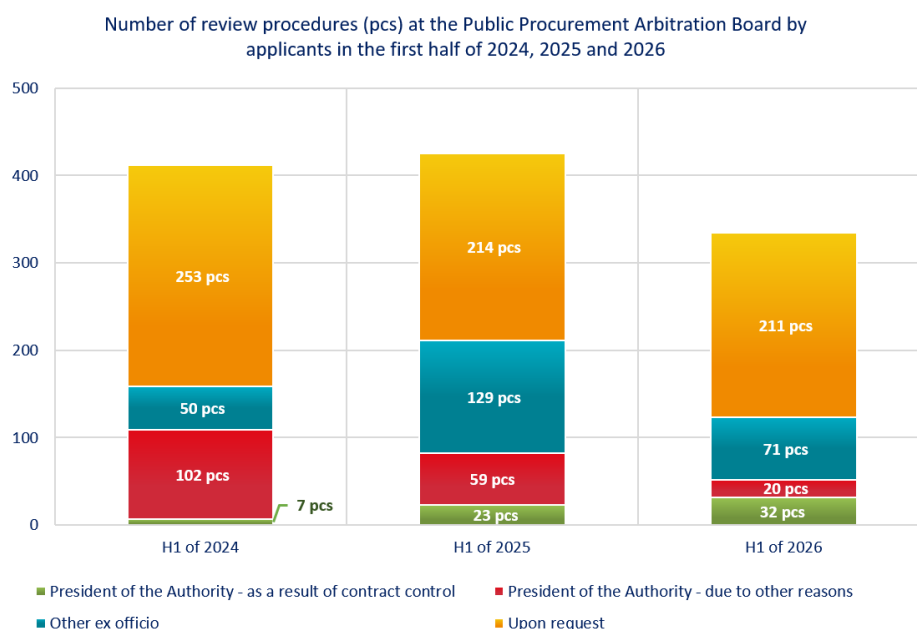
## V. LEGAL REVIEWS

*The number (pcs) of the legal reviews and value (HUF million) of the fines imposed in H1 of 2024, 2025 and 2026*



From 425 pieces measured in the first half of 2025, in H1 of 2026 the number of legal reviews dropped by more 20% to 334. Simultaneously, the value of fines imposed considerably lowered after the outstanding value of HUF 691,7 million in H1 of 2025, and lagging behind the value two years ago in the first semester of 2024, it decreased to HUF 127,7 million.

All in all, in H1 of 2026 higher value fines can be seen by less legal review cases, however, the total value of the fines is still significantly lower than in the same periods of the past two years.



Upon looking at the breakdown of legal review cases submitted to the Public Procurement Arbitration Board by applicants, it can be concluded that procedures launched upon request still account for the majority of the cases (211 pieces), although their volume has a lowering trend compared to the past years.

In terms of legal titles for initiation, the most significant shift can be seen at procedures launched by the President of the Authority due to contract control: the number stepped up from 7 in H1 of 2024 to 32 in H1 of 2026, which more than a four-fold growth in two years.

In contrast, the number of other procedures launched ex-officio shrunk from the outstanding level of 129 pieces last year to 71, which was one of the major factors behind the entire downturn.

## **VI. SUSTAINABILITY ASPECTS IN HUNGARIAN PUBLIC PROCUREMENTS**

The Public Procurement Authority has been collecting data on procedures with environmental (green) and social aspects since 2012, in this respect, its primary goal is to provide more comprehensive and more reliable picture by its statistics covering this field both above and below EU thresholds.

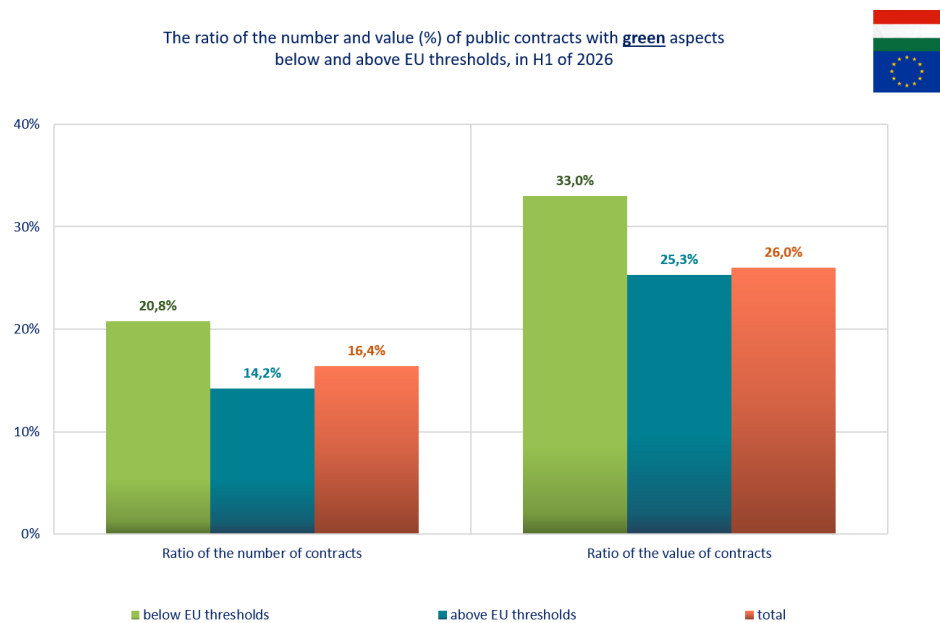
Considering that data provision on sustainability aspects is mandatory only in terms of national standard forms, statistical data collection was restricted to procedures below EU thresholds, nevertheless, there has been significant improvement in this field thanks to the methodological developments and the enhancement of practitioners' awareness. More and more data fields related to sustainability aspects are filled in at eForms applied above EU thresholds, as the Authority made considerably efforts to encourage data provisors and to enhance administrative discipline. Nevertheless, it has to be underlined that it still not mandatory for contracting authorities to mark strategic aspects in the EU notices – except for EU obligations related to clean and energy-efficient road transport vehicles. Consequently, such fields are often left empty, which makes the definition of statistical data difficult.

Due to the above technical features, data provision requires constant fine-tuning, nevertheless, statistics already show a more comprehensive picture about the “greening” of the Hungarian public procurement market.

Government Decree No. 235/2024 (of 8 August) on environmental criteria applicable in public procurements (hereinafter: Gov. Decree) entered into force on 1 January 2025, which sets forth the mandatory application of environmental criteria in terms of certain subject-matters. The material scope of the Gov. Decree affects a number of procedures currently still in progress; hence the actual impact of the obligation cannot be fully evaluated in this time period. Data currently available nevertheless suggest an increasing tendency of environmental aspects.

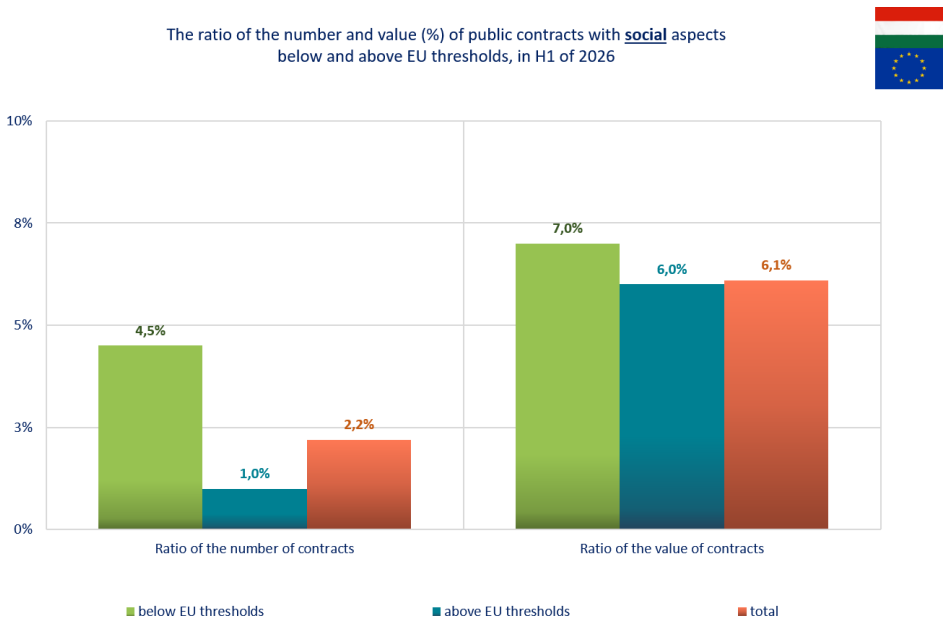
The Public Procurement Authority monitors the implementation of sustainability aspects not just from environmental, but also from the social side, considering that social public procurement supports the implementation of social responsibility, especially in the field of employment, equal chances, social inclusion and accessibility.

1. Data on public contracts with environmental aspects above and below EU thresholds in H1 of 2026



In H1 of 2026 green public procurements accounted for a considerable proportion both above and below EU thresholds. The ratio of their number was higher below EU thresholds: more than one fifth of the contracts, that is 20,8 percent applied environmental criterion, while above EU thresholds this proportion was 14,2 percent, in total above and below EU thresholds the ratio of green public procurements was 16,4 percent of the contracts. Spending on procurements with green aspects below EU thresholds accounted for one third (33,0%) of the total value of the contracts, above EU thresholds they represented about one forth (25,3%), while in total the value ratio reached 26,0 percent. To sum it up, contracts below EU thresholds with environmental aspects were more significant both in terms of their quantitative and value ratio.

2. Data on public contracts with social aspects above and below EU thresholds in H1 of 2026



In H1 of 2026 upon looking at the quantitative ratio of public contracts with social aspects, below EU contracts considerably outweighed the 1,0 percent share of contracts above EU thresholds. The ratio of the number in total above and below EU thresholds was 2,2 percent, while the difference is less in terms of the value ratio, below EU threshold contracts having just 1 percentage point higher share (7,0% against 6,0%), which means 6,1 percent as the total value ratio. All in all, social aspects are applied more frequently below EU thresholds, but such contracts have much higher value above EU thresholds.

