



**MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT**  
HĪKINA WHAKATUTUKI



# **New Zealand Government Procurement Business Survey 2019**



Published July 2019

## New Zealand Government

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# Introduction

## New Zealand Government Procurement Business Survey

New Zealand Government Procurement (NZGP), a branch within the Ministry of Business, Innovation and Employment, runs an annual business survey to understand businesses' experiences of government procurement. The survey identifies businesses' perceptions of the quality of government procurement and their experiences when doing business with government. These results (along with other data) help us to track the impacts of government's efforts to improve procurement practice.

In April 2019, the sixth edition of this survey was run. An invitation to participate in the survey was sent to everyone who had subscribed to a tender on the Government Electronic Tenders Service (GETS). A link to the survey was also advertised on GETS, and was made available on the NZGP website. The survey was open from 8 April to 14 May 2019 and received a total of 2,095 responses. This compares to 2,534 responses in 2018, 2,095 responses in 2017, 1,983 in 2016, 277 in 2015 and 666 in 2014.

Previous surveys have identified areas where government could improve its procurement practice to better partner with businesses and more effectively procure goods and services. Some developments that have taken place over the last couple of years as a result of the areas identified in the survey include:

- implementing the online Procurement Capability Index (PCI) tool in August 2018, for agencies to assess their capability and steer improvements;
- developing a Social Services Procurement Training Strategy which will, over the next 3 years, provide training in contract management for staff engaging with social service providers;
- delivering contract management training to over 150 government officials from ten government agencies;
- holding monthly procurement breakfast sessions for procurement professionals on a wide range of topical issues to raise awareness and capability among agencies.
- continued incentivising of government agencies in the use of standardised templates (where appropriate) to reduce duplication, improve consistency and increase clarity in tender documents and contracts via the ready provision of updated templates;
- creating the Significant Services Contracts Framework to provide guidance to managers of high risk and/or high value contracts that are critical to agencies' business objectives; and
- establishing the *2017 Social Services Procurement Capability Baseline Results* to be able to track progress towards growing government procurement capability in the social sector.

## Structure of the report

The report is structured around five key areas: initial engagement, tender activity, contract management, supplier relationships, and the complaints process. Each section summarises how businesses reported their experiences in these areas. Where possible, questions have been compared over all five years. However some questions have been added or altered between years to improve the survey and in response to feedback from respondents. Where changes to questions have been made, it is not always possible to compare over all five years of the survey. The 2019 survey aims to build on the 2018 baseline data and thus replicates the 2018 survey questions. Where

questions were newly added in 2018 that did not exist in comparable form prior, baseline comparison will only extend from 2019 to 2018.

## Key Findings 2019

### Significant improvements:

- Overall, the 2019 survey results are similar to the 2018 results, though they tend to fall just short of many of the 2018 milestone achievements, yet compare favourably to most 2017 and earlier results.
- One significant 2019 milestone improvement is in the clear increase of suppliers finding utility in their contract review meetings, with 66% of respondents finding these meetings to be 'often' or 'always' helpful, compared with 57% in 2018 and 55% in 2017.

### There are some interesting findings:

- Where businesses have their main offices located in New Zealand, there has been a slight shift in 2019 compared to 2018 from the Auckland hub to the regions, in particular the Waikato and Taranaki. Approximately 38% of businesses in 2018 cited Auckland as the location for their main office, compared to approximately 35% in 2019.
- There were more small to medium-sized businesses (businesses with 6-49 full time employees) responding to the survey in 2019 as compared to 2018. There was also a decrease in the number of businesses relying on government contracts as a main source of annual turnover. This is counter to the trend prior to 2019, whereby government was becoming a more important customer across most businesses.
- The trend identified in 2018 of smaller businesses being more reliant on government business than larger ones but feeling less able to bid effectively for tenders compared to larger businesses was also mirrored in the 2019 findings.

### Areas of concern:

- Since 2017, all six key competencies of contract managers received a less favourable rating from businesses as compared to the prior year, particularly in the areas of professionalism and communication.
- There is an ongoing trend in a lack of follow-up debriefs being offered by agencies to suppliers after a bid process. A large proportion of 2019 respondents (39%) stated they were 'rarely' or 'never' offered a follow-up debrief, similar to 2018 when 40% of respondents stated the same.
- While the overall quality of procurement activity on the whole showed similar results in 2019 as to 2018 and compared favourably to previous years, there has been an increase of 'poor' and 'very poor' ratings from businesses, up 4% in total from 2018. This represents an area of concern that will need monitoring in future surveys. Further analysis of the result showed that the ICT sector in particular provided a large number of negative ratings in regards to overall quality of government procurement activity. Interestingly, the ICT sector also showed some of the least confidence in being able to effectively bid for government contracts.

- There has been a slight decrease in how businesses rated the sufficiency and clarity of tender documents provided by government agencies. In particular the sufficiency of tender documents was seen critically, with a 3% drop in positive ratings in this regard from 2018 to 2019.

## Definitions and Interpretation of Results

**Business size:** To understand how business size might affect the results, businesses were asked to indicate how many Full Time Employees (FTEs) they had. These groups are categorised as:

- Micro (0-5 FTEs)
- Small (6-19 FTEs)
- Medium (20-49 FTEs)
- Large (50+ FTEs)

**Score:** for some questions businesses were asked to rate aspects of government procurement on a five point scale from very poor – very good, or never – always. Scores of 1 or 2 were considered to be negative, a score of 3 was neutral, and scores of 4 or 5 were positive.

**Unspecified / blank responses:** Responses to questions that chose ‘not applicable’ have been removed from the report. This is due to the fact that in previous years, ‘not applicable’ has not been an option. In order to accurately compare between years this response has been omitted throughout the survey.

### Limitations

Questions that asked businesses to rate aspects of procurement from very poor – very good are difficult to compare with similar questions from previous years where a different scale (poor, fair, average, good, excellent) was used previously.

While some tentative comparisons have been made comparing negative scores (1 and 2) and positive scores (4 and 5) it is with the caveat that direct comparisons cannot be made.

The decision to change to a more commonly understood scale was made to give more accurate results that can be more effectively compared in the future.

In some questions pertaining to the regional location of the business, there were less than 20 responses to a particular chosen option. Where this has occurred, the location name has an asterisk next to it.

For these reasons, the results should be considered as indicative.

### Methodology

The 2019 Government Procurement Business Survey is designed to build on and further develop the baseline data of the 2018 survey. As such, the 2019 survey questions replicate the 2018 questions and the only difference lies in the depth of analysis regarding how different industry sectors rated the overall quality of government procurement activity.

# 1. Business Profile

## Where businesses are based

Similar to 2018, most of the businesses that responded to the survey in 2019 are based in New Zealand (87%). As in 2018, Australia-based businesses made up ca. 6% of the respondents, North America 3%, Europe 2% and Asia just under 1%.

**Figure 1. Where is your organisation's ownership based?**

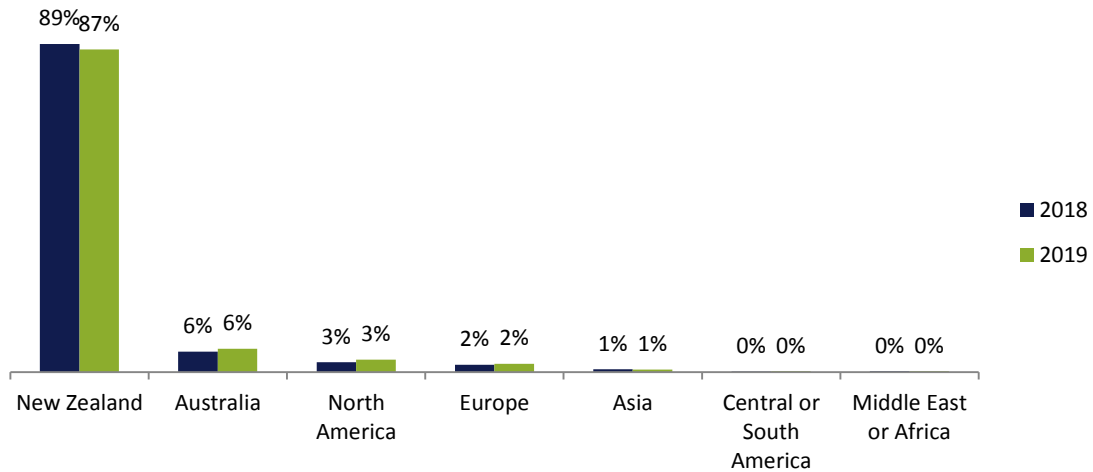
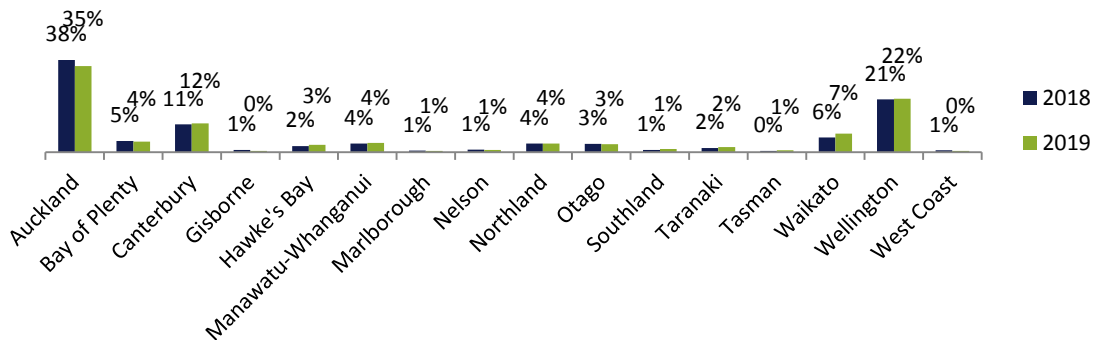


Figure 2 shows where in New Zealand’s regions responding businesses are based, compared to 2018. Auckland, Wellington and Canterbury were identified as the regions where most businesses are based, with a slight decrease in 2019 respondents from Auckland in favour of regions such as Waikato and Canterbury.

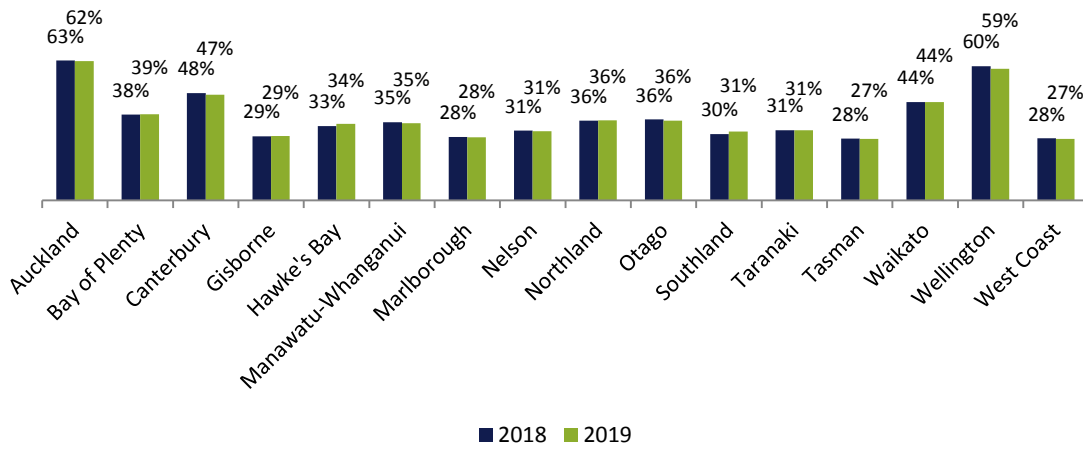
**Figure 2. In which region is your main office in New Zealand based?**



In terms of regions in which businesses supply to government, the results are almost identical to 2018, with Auckland and Wellington as the most popular regions. Note that many businesses supply to government in multiple regions.



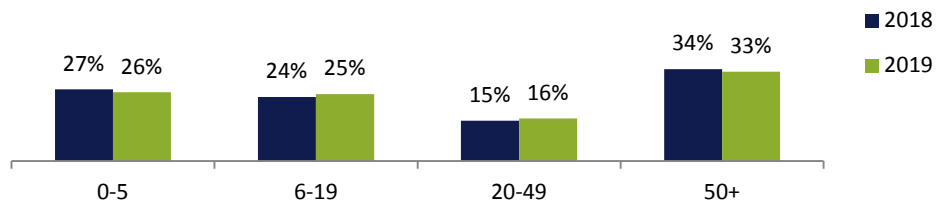
**Figure 3. In what region(s) do you supply to government agencies?  
(Select all that apply)**



## Business size

Businesses with 50 or more full time employees remain the single largest group of respondents to the survey. Businesses employing less than 20 again made up ca. 51% of respondents.

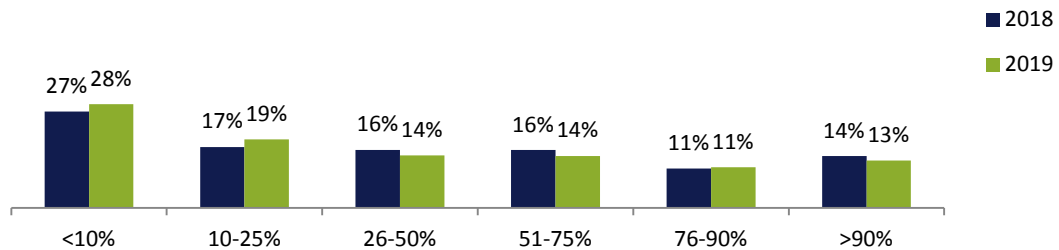
**Figure 4. In full time equivalents, how many people work in your organisation?**



## Annual turnover

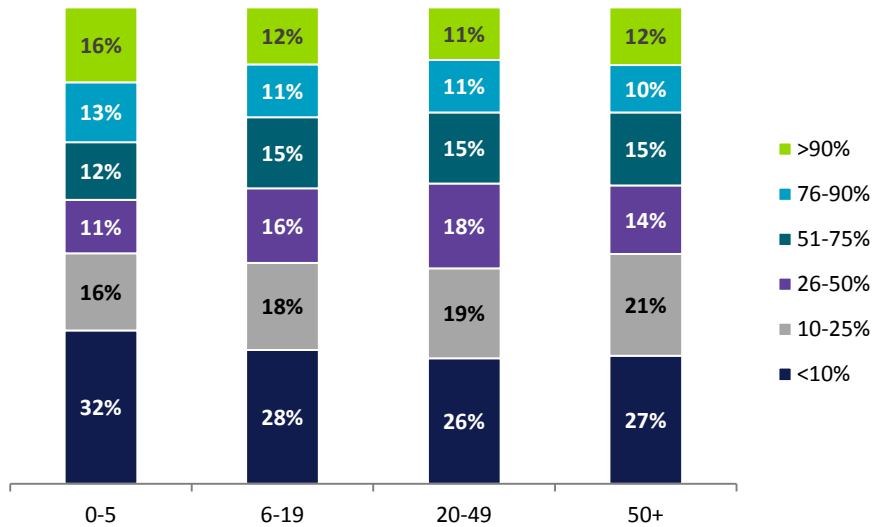
Businesses were asked approximately how much of their annual turnover comes from supplying government. Figure 5 reveals similar figures between 2018 and 2019 in this regard. Overall in 2019 for over a third (38%) of businesses more than half their turnover comes from government. This compares to 41% in 2018.

**Figure 5. Approximately how much of this annual turnover comes from supplying New Zealand government agencies?**



Building on last year’s finding that the size of the business contributes to the proportion of annual turnover coming from supplying government agencies, 16% of very small businesses (less than 5 FTEs) replied that 90% or more of their turnover comes from supplying to government compared to 11%-12% for larger businesses (50 or more FTEs).

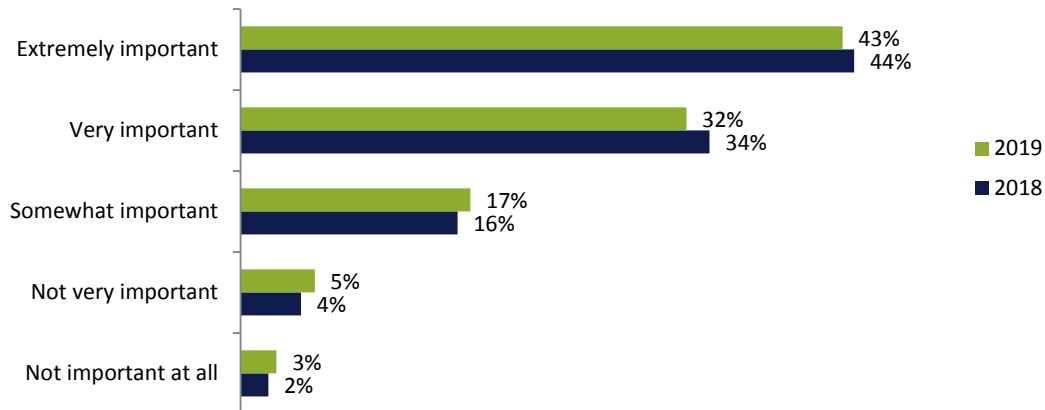
**Figure 6. Annual turnover from supplying government agencies, cross-cut by business size**



### Government as a customer

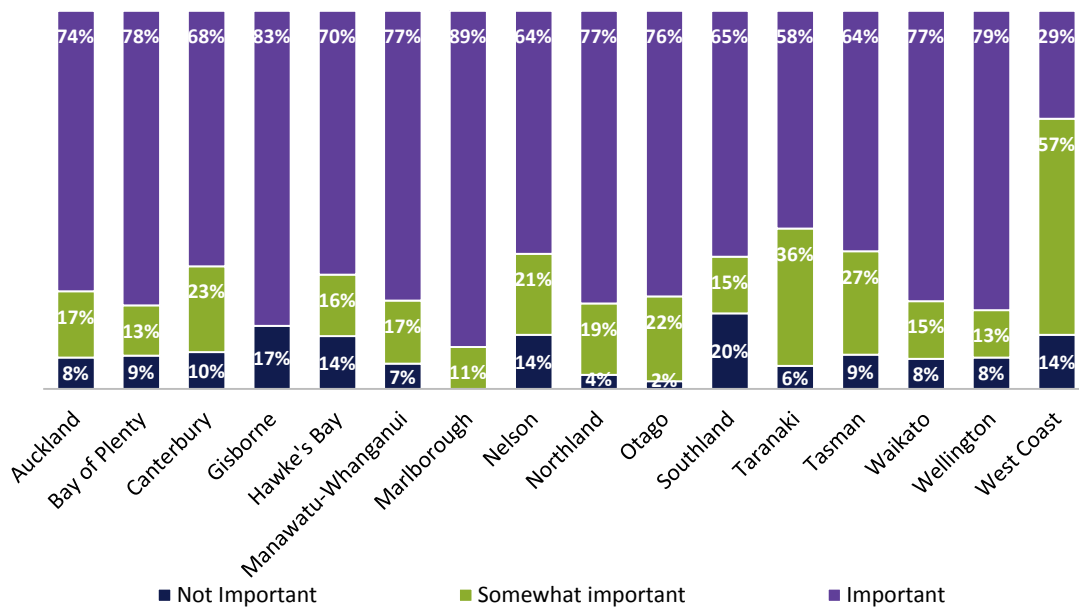
Respondents to the survey continue to confirm that the government is an important customer, with 43% of respondents in 2019 stating that government business is extremely important to them. This compares to 29% in 2016.

**Figure 7. How important is government business to your organisation?**



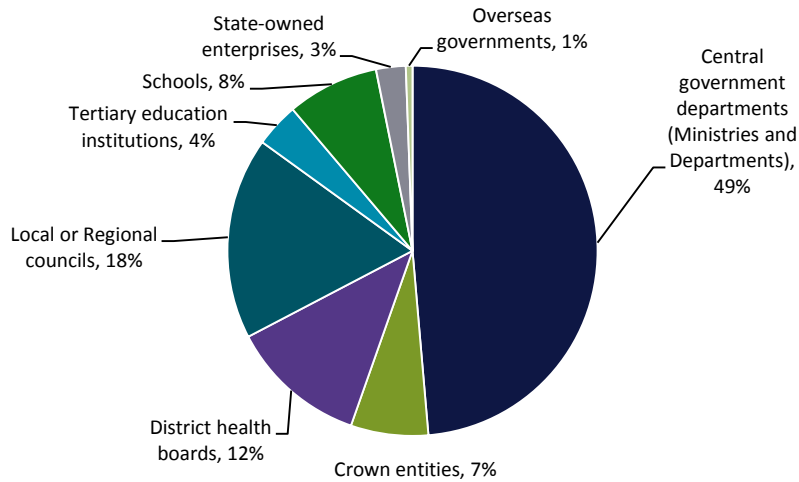
As in 2018, the location of the business as a factor influencing the importance of government as a customer was investigated. Figure 8 shows how business from the various regions responded to how important government business is to them, with Marlborough, Hawke’s Bay and Gisborne leading responses that state government is important to their business. The West Coast, Taranaki and Canterbury had the least number of responses stating government is important to the respondent’s business. The West Coast, Tasman, Nelson, Marlborough and Gisborne responses each constitute sample sizes of less than 20 responses.

**Figure 8. How important government is as a customer to business, by location (2019)**



Businesses were also asked about the types of agencies they supply and were able to select as many options as might apply. As in 2018, central government departments were identified as the main agency type supplied by businesses with 49%, followed by local or regional councils (18%), and then district health boards (12%).

**Figure 9. Of the agencies you supply, which is your primary customer?**

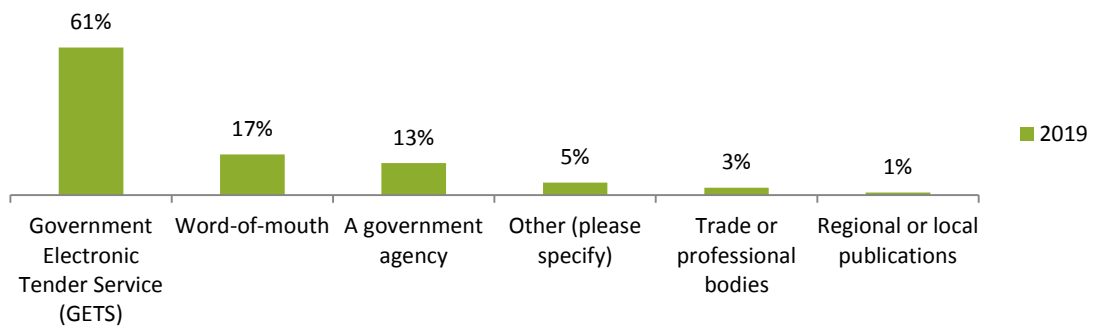


## 2. Initial Engagement with Government

### Hearing about opportunities to participate in government contracts

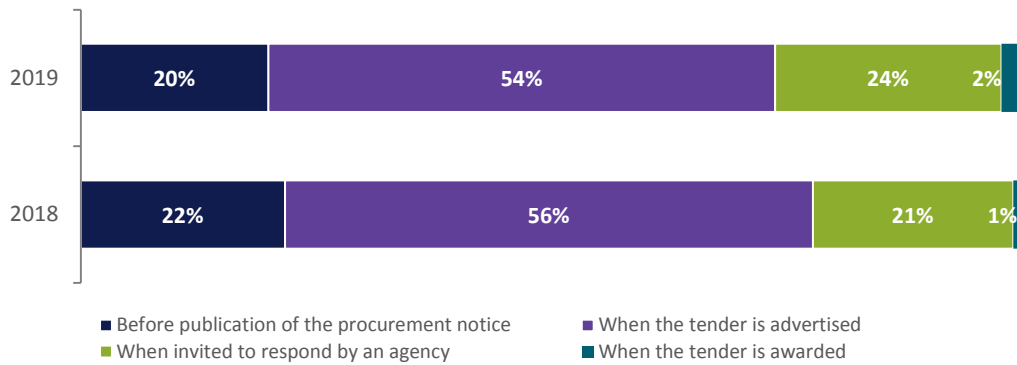
Asked about the main source of information in regards to government contracts, businesses continue to rely on the Government Electronic Tenders Service (GETS), with 61% of respondents citing the service as their main source of information. This compares to 66% in 2018 and 64% in 2017.

**Figure 10. What is your main source of information about government contracts?**



In 2019, as in 2018, most businesses (54% in 2019) first heard about a contract opportunity when it was advertised. There were slightly more instances of businesses first hearing about an opportunity when being invited to respond by an agency in 2019, an increase of 3% from 2018.

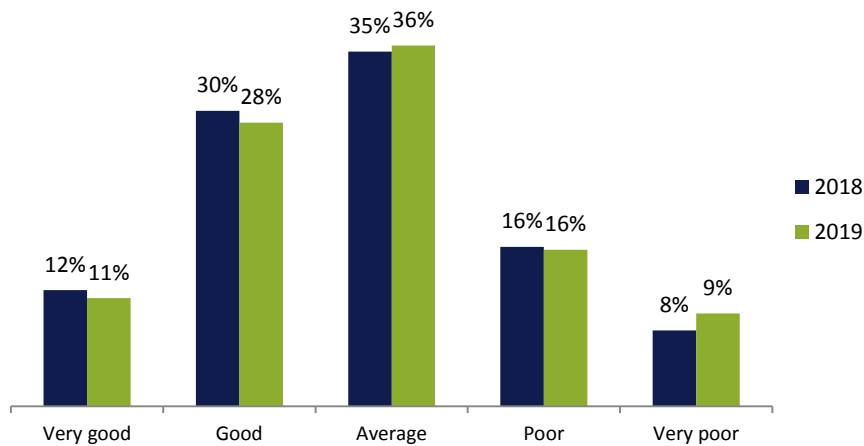
**Figure 11. When businesses hear about contract opportunities**



## Initial Engagement

Businesses were asked to rate government’s initial engagement on a scale from ‘very poor’ to ‘very good’. There has been no significant change in the rating from 2018, with 11% now describing government’s initial engagement as ‘very good’, and 9% providing a ‘very poor’ rating.

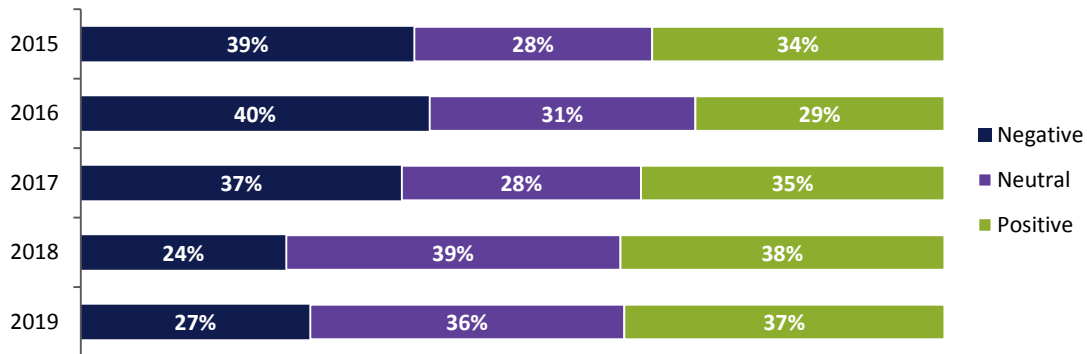
**Figure 12. How businesses rate government's initial engagement**



## Government openness to discuss contract opportunities

Businesses were asked to rate how openly government officials discussed their requirements with businesses when asked for more information about a contract opportunity, using a scale from never to always. Due to a change in rating scales, answers have been grouped here into three broad categories, negative, neutral, and positive. Figure 13 shows that the 2019 figures closely resemble the 2018 statistics overall, with negative ratings at 27%, and positive ratings at 37%.

Figure 13. How openly officials discussed contract opportunities



### 3. Tender Activity

#### Time to respond to a tender

Asked whether businesses had enough time to respond to a tender during the procurement process, responses in 2019 almost mirrored responses in 2018. In 2019, 15% answered that they ‘always’ have enough time to respond to a tender, compared to 14% in 2018, while 35% answered they ‘often’ have enough time, compared to 36% in 2018. The rating scales varied slightly in 2017, but comparisons are still possible; 17% of respondents replied they had ‘plenty of time’ to respond to tenders in 2017, while 28% replied with ‘sometimes’.

Figure 14. Do you have enough time to respond during the procurement process (2017)

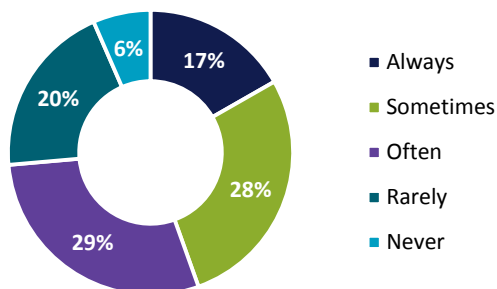
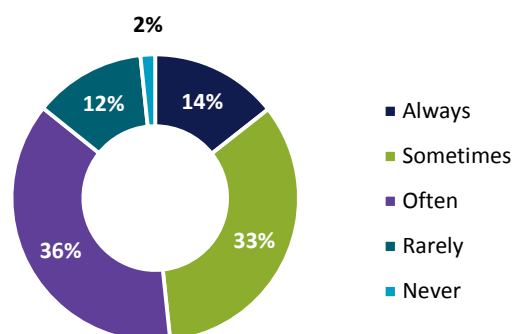
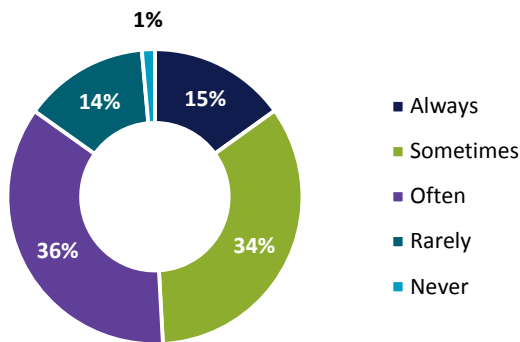


Figure 15. Do you have enough time to respond during the procurement process (2018)

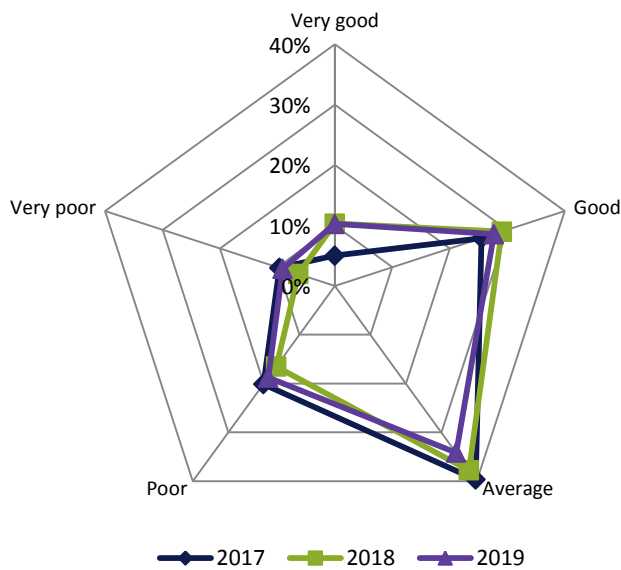


**Figure 16. Do you have enough time to respond during the procurement process (2019)**



Businesses were also asked to rate the overall quality of government’s tender activity. Again, results were very similar to 2018, with most (34%) providing an ‘average’ rating and only 10% of respondents in 2019 describing the quality of the tender activity as ‘very good’.

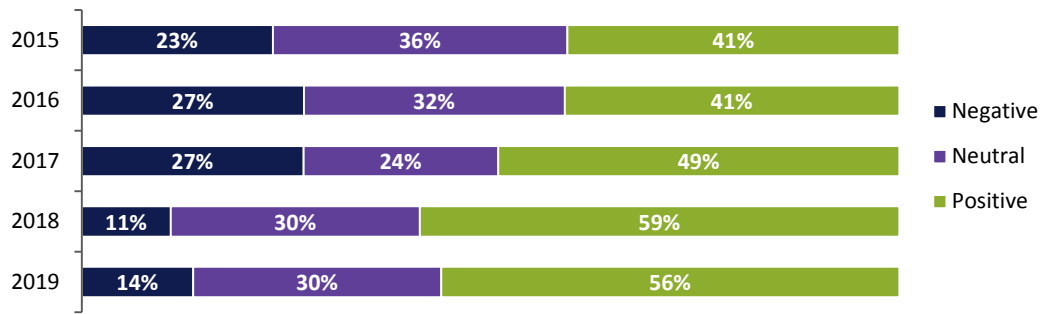
**Figure 17. How businesses rate the quality of tender activity**



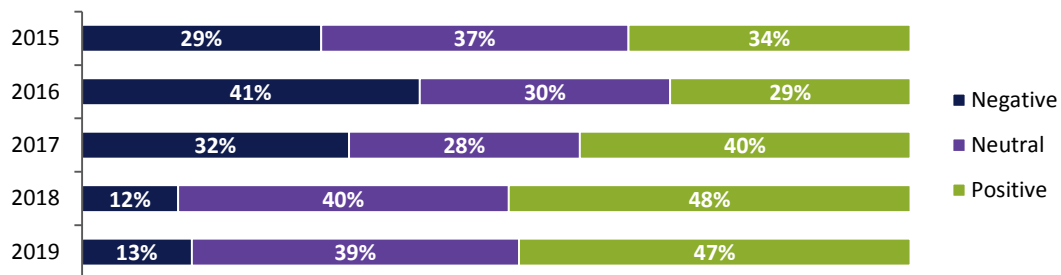
## Tender documentation

While there has been a substantial improvement in how businesses perceive the quality of tender documents between 2015 to 2019, particularly between 2017 and 2018, respondents in 2019 have been a little less positive than in the previous year, as Figure 18 shows. Overall, both 2019 and 2018 compare favourably to previous years, with 56% of respondents in 2019 ascribing a positive rating to the sufficiency of tender documents, as compared with 59% in 2018, 49% in 2017 and 41% in 2015 and 2016. Similarly the clarity of tender documents received a positive rating by 47% of respondents in 2019, compared with 48% in 2018, 40% in 2017, 29% in 2016 and 34% in 2015.

**Figure 18. Sufficiency of tender documents**



**Figure 19. Clarity of tender documents**

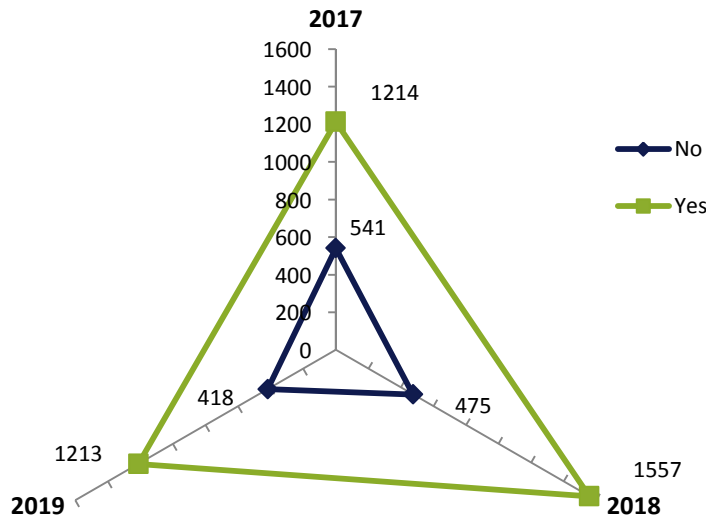


## Factors relevant to success in tendering

In 2019, 1213 businesses stated they felt they could effectively bid for governments contracts, while 418 businesses replied with a ‘no’ in this regard. This is a smaller sample size than in 2018, when 1557 responded that they feel they can effectively bid for government contracts and 475 businesses replied with ‘no’. This represents a slight decrease of 3% in confidence between 2018 to 2019, from 77% of 2018 respondents feeling they are able to effectively bid for government contracts to 74% in 2019.

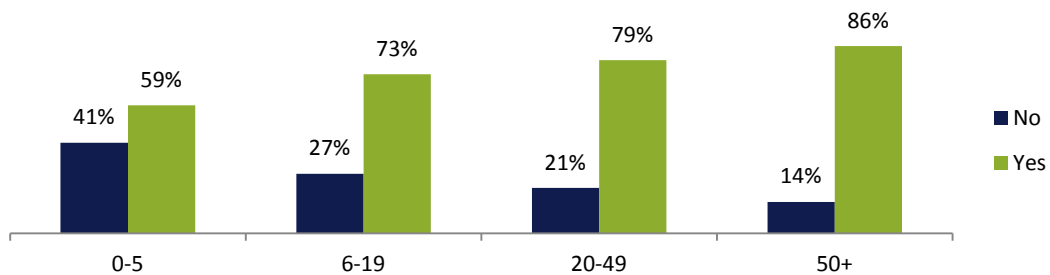


**Figure 20. Do you feel you can effectively bid for government contracts?**



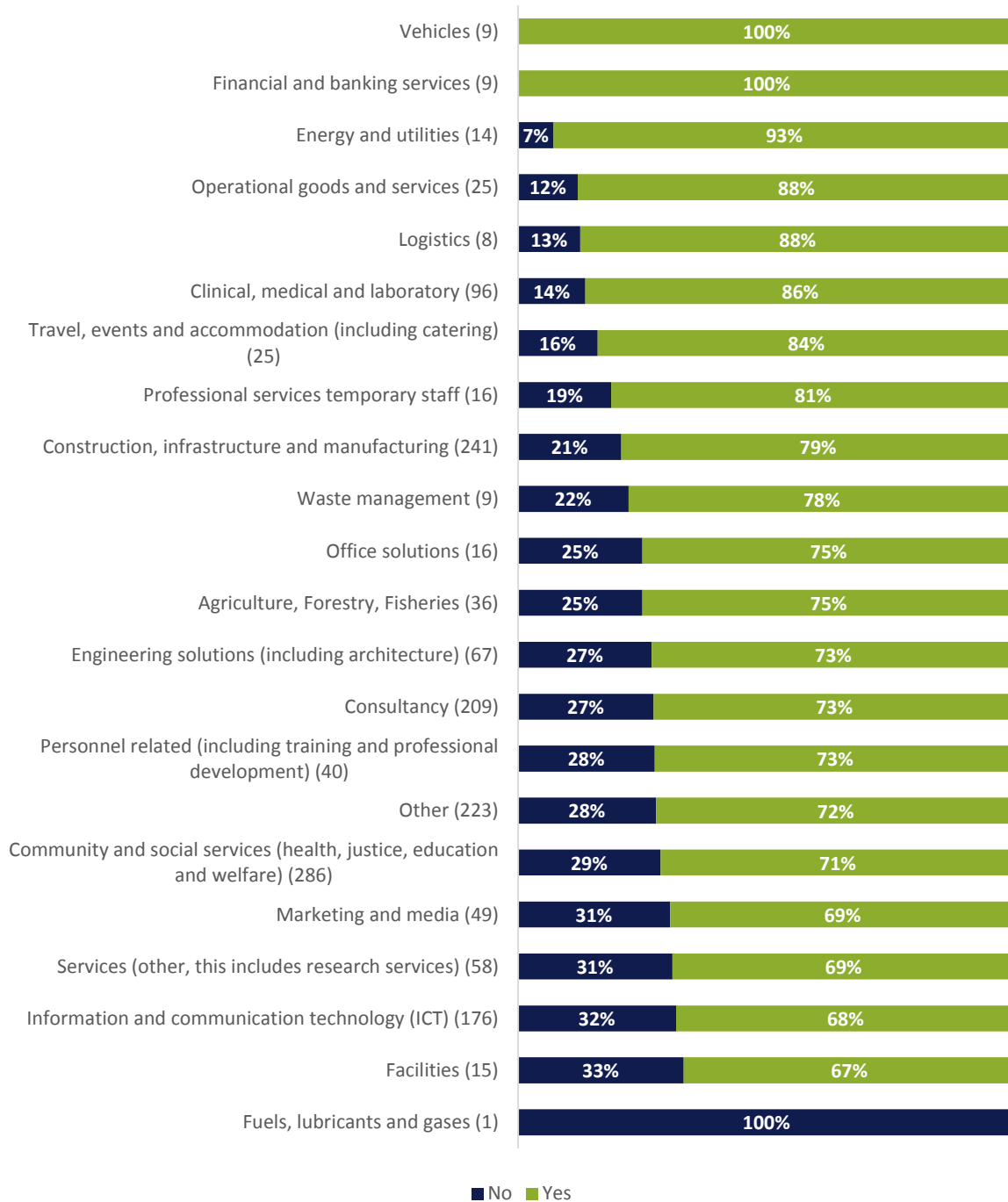
As in 2018, these results have been further examined in terms of business size and the nature of the business (main field of business). Figure 21 displays responses to whether businesses feel they can effectively bid for government contracts by business size (number of full time employees). In 2019, ca. 86% of larger businesses (50 or more employees) responded positively to feeling able to effectively bid for government contracts, followed by ca. 79% for business with 20-49 full time employees, ca. 73% for the 6-19 category, and finally ca. 59% of smaller businesses with up to 5 full time employees. This is the same trend as in 2018.

**Figure 21. Do you feel you can effectively bid for government contracts? Cross cut by full time employees**



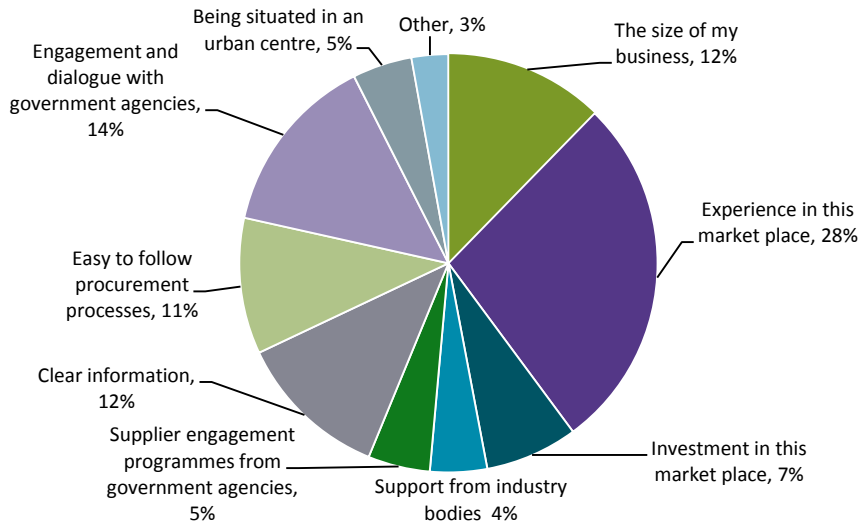
How businesses identified themselves in terms of their main field of business was also used to analyse how confident businesses felt in their ability to effectively bid for government contracts. Among industries with sufficient responses (above 20), the ICT sector, marketing & media sector and community and social services sectors were less confident in feeling able to bid effectively for government contracts (Fig. 22).

**Figure 22. Do you feel you can effectively bid for government contracts? Bid confidence by main field of business**



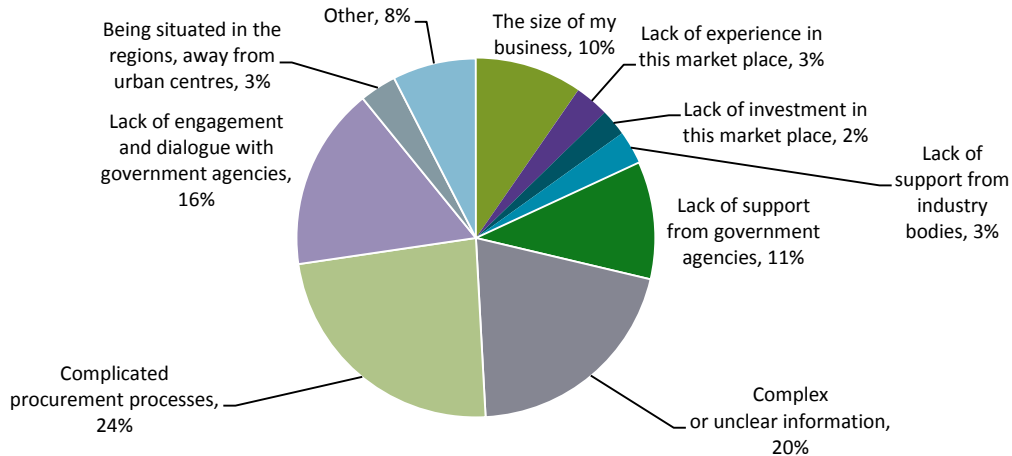
Following on from how businesses view whether they can effectively bid for government contracts, businesses were also asked about the factors that increased or decreased their success in bidding for tenders. The primary factor was their experience in the marketplace (28%), followed by the engagement and dialogue with government agencies (14%), clear information (12%) and easy-to-follow procurement processes (11%).

**Figure 23. What are the main factors that help you to effectively bid for government contracts? (Select all that apply)**



In terms of factors that decreased businesses' bid effectiveness, the main factors were complicated procurement processes (24%), complex or unclear information (20%), and lack of engagement or dialogue with government officials (16%). Given that engagement and dialogue with government agencies, clear information and easy-to-follow processes were also some of the main success factors quoted by business, this would suggest an ongoing trend of disparity between how different agencies manage these areas.

**Figure 24. What are the main factors that make it difficult for you to effectively bid for government contracts? (Select all that apply)**

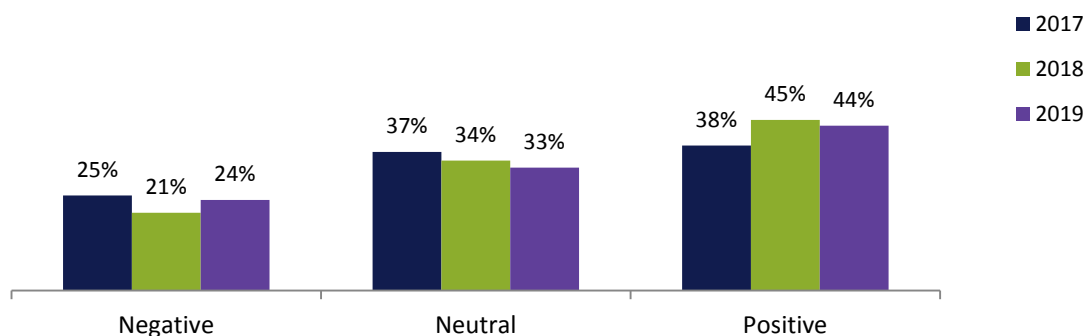


## 4. Contract Management

Businesses were asked to rate the overall quality of contract management across government. 2019 figures once again closely resembled 2018 figures, with 13% of respondents providing a 'very good' rating, 30% a 'good' rating, 34% an 'average' rating, 15% a 'poor' rating and 9% a 'very poor' rating. Figure 25 provides an overview of responses going back to 2017. With well over a third of

respondents providing an 'average' or worse rating in this field, this continues to be an area requiring improvement, as was highlighted in the 2018 report.

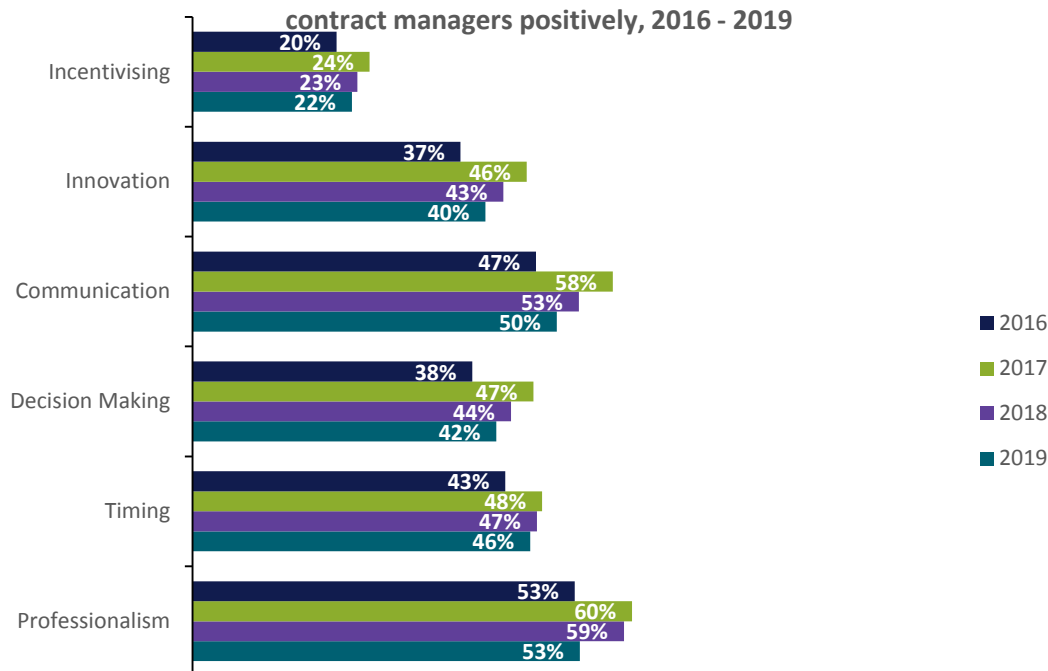
**Figure 25. How businesses rate the quality of government's contract management**



## Competencies of contract managers

Businesses were asked to rate the performance of their contract manager across six key competencies – incentivising performance, openness to innovation or new ideas, clear communication, the quality of decision making, timing of transactions and the level of professionalism and knowledge. While 2019 provided similar figures as compared to years prior to 2018, there is a discernible decrease of 6% in the 'professionalism' rating from 2018 to 2019, as Figure 26 shows.

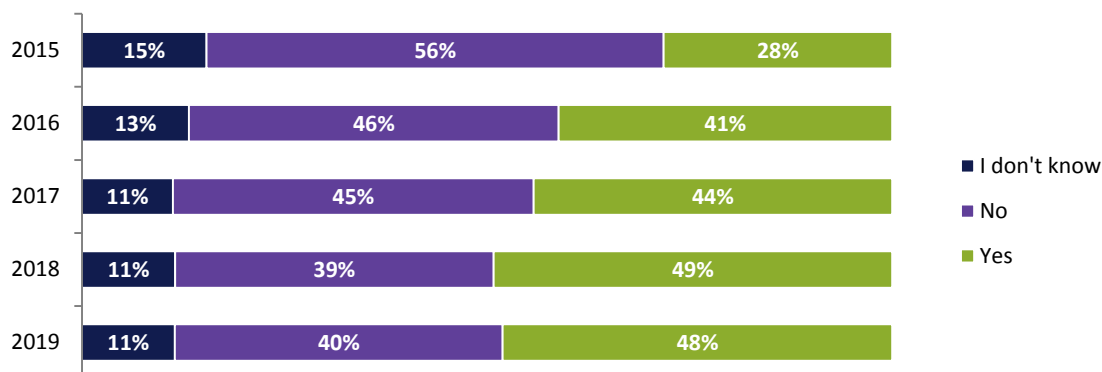
**Figure 26. Percentage of businesses that rated competencies of their contract managers positively, 2016 - 2019**



## Contract review meetings

Businesses were asked whether agencies they supply hold regular contract review meetings. Responses in 2019 almost mirror 2018 responses in this regard, with 48% of respondents replying with 'yes' and 40% 'no'.

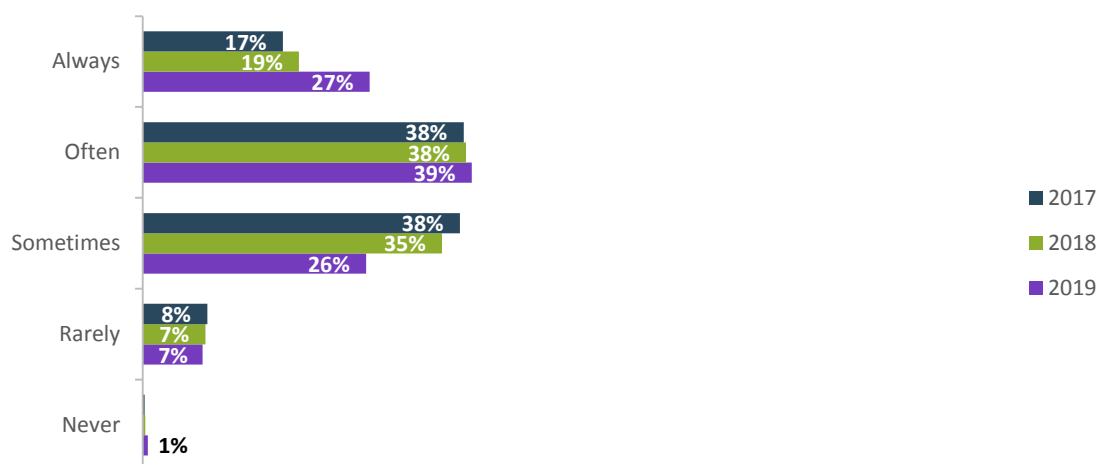
**Figure 27. Do the agencies you supply hold regular contract review meetings?**



In terms of how often businesses found these contract review meetings to be helpful, there was a surge in positive responses in 2019, with 27% of respondents stating they 'always' found these meetings to be helpful, compared to 19% in 2018 and 17% in 2017.

In other words, while 40% of respondents replied that agencies did not hold regular review meetings, a majority of respondents felt these meetings to be useful when they were held, and increasingly so in comparison to previous years.

**Figure 28. Are these contract review meetings helpful?**



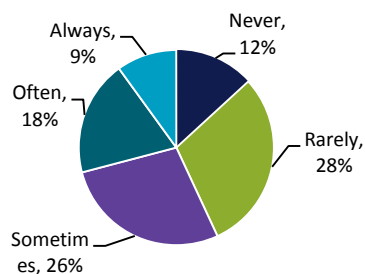
## 5. Supplier Relationships

### Debriefing suppliers

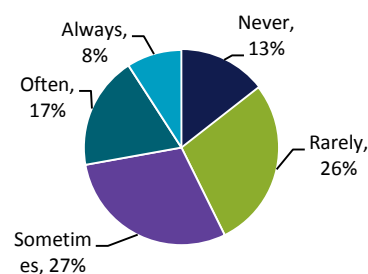
Businesses were asked how frequently they had a follow-up debrief after bidding for a tender and how helpful it was. In the years prior to 2018, these questions were asked as a single comprehensive question, making direct comparison difficult.

There has been no change since 2018, with only 25% of respondents in 2019 stating that they were 'always' or 'often' offered a follow-up briefing. A large proportion (39%) are rarely or never offered a follow-up briefing. This continues to be an area of ongoing concern.

**Figure 29. Frequency of follow-ups offered (2018)**

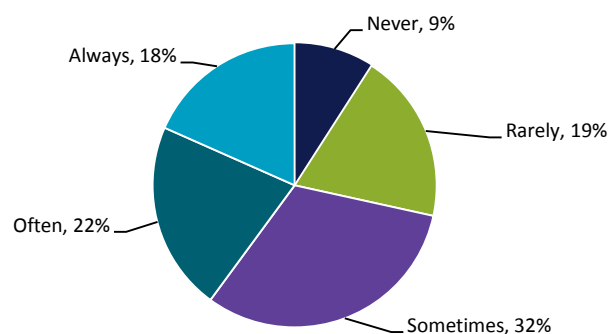


**Figure 30. Frequency of follow-ups offered (2019)**



In regards to how helpful these follow-up meetings were, businesses were quite positive, with 40% stating 'always' or 'often', and 32% stating 'sometimes'.

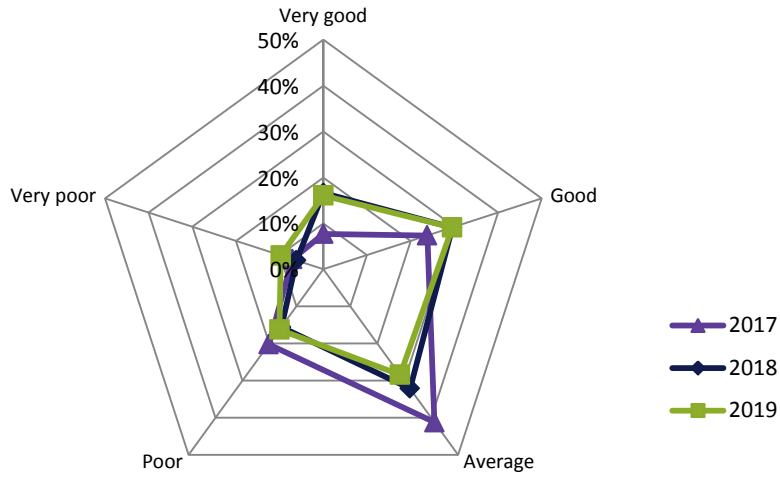
**Figure 31. When you were provided with a follow-up from a government agency, was it helpful?**



### Overall quality of supplier relationships

In rating the overall quality of government's supplier relationships, 16% of respondents found their relationships with agencies to be 'very good', 30% replied with 'good', 28% with 'average', 16% with 'poor' and 10% found them to be 'very poor'. While this roughly tracks with last year's results, there was a decrease in respondents describing the relationship as 'average' (32% in 2018) and an increase in respondents describing the relationship as 'very poor', denoting an area for improvement.

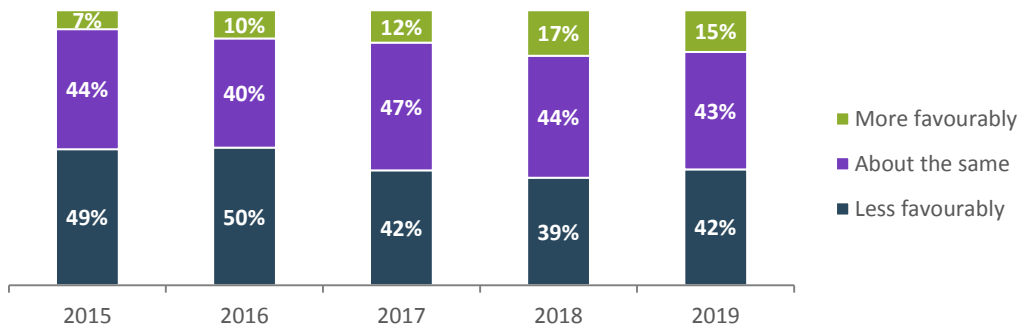
**Figure 32. How would you rate the quality of the following government procurement activities?**



### Comparing government to other customers

As in previous years, businesses in 2019 were asked how doing business with a New Zealand government agency compares to doing business with other customers. 15% of respondents stated doing business with government compared more favourably and 43% stated it was about the same. The total percentage of respondents who replied with 'more favourably' or 'about the same' (58%) compares to 61% in 2018, 59% in 2017, 50% in 2016 and 51% in 2015. See Figure 33.

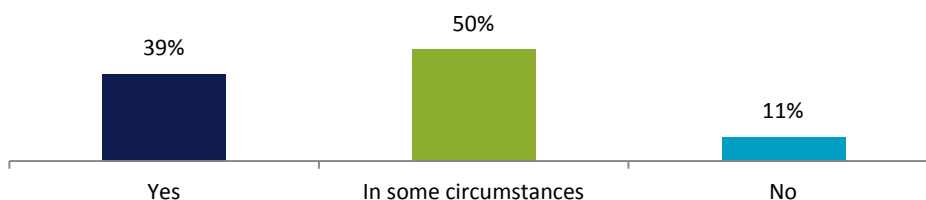
**Figure 33. Comparing government with other customers**



### Recommending government as a customer

Businesses were asked whether they would recommend government as a customer to other businesses. To capture nuance and a wide variety of reasonings, this question was open-ended, in keeping with previous years.

**Figure 34. Would you recommend government as a customer to other businesses?**



**39% of businesses said they would recommend government as a customer:**

“They are usually good size projects and they happen”, “Government is good at paying their bills on time”, “Reliable work, once established as a supplier”

**50% of businesses said they would recommend government ‘in some circumstances’:**

“As a customer, government varies greatly from agency to agency” ... “Yes, generally, however procurement cycles can be lengthy and expensive” ... “Long upfront process, which for a small organisation has a large opportunity cost consideration”

**11% of businesses replied that they would not recommend government as a customer:**

“Submitting a tender is a lengthy process, there can only be one winner and all the other submitters have wasted time and money with no return”... “much harder to work with and time consuming (esp. decision-making processes) than the private sector”... “structure is very rigid – one size does not fit all for what government tenders for”

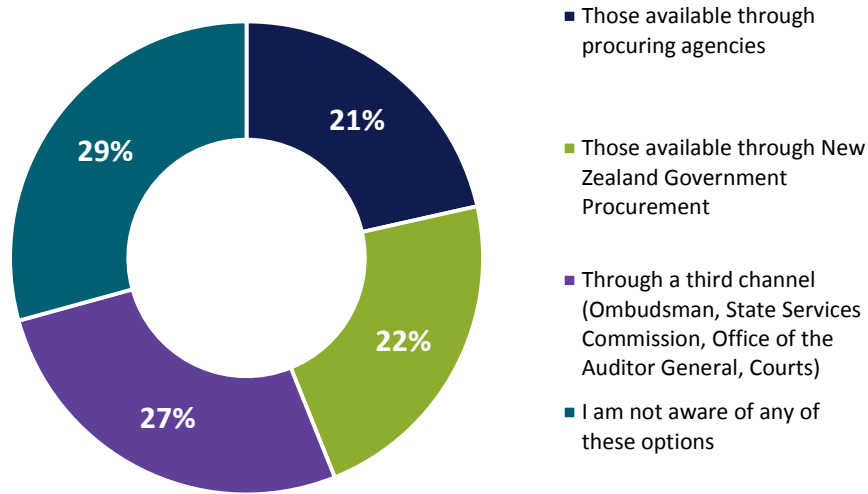
## 6. The Complaints Process

Businesses were asked about their awareness about the availability of specific complaints processes, what actions, if any, businesses took when they had a complaint, and finally why a business did not take any action when they had a complaint. Prior to 2018, only a single question was asked about complaints processes which revealed that many businesses were unaware of the avenues and options to lay a complaint.

As shown in Figure 35, 29% of businesses were not aware of any complaints options, similar to 2018, but still comparing favourably to 2017, when 61% of respondents stated they had no knowledge of complaints avenues. 21% of businesses stated that they were aware of avenues provided by New Zealand Government Procurement, 22% of businesses stated they were aware of complaints processes with the procuring agencies, while 27% claimed knowledge of 3<sup>rd</sup> party avenues such as the Ombudsman, State Services Commission, Office of the Auditor General or the Courts.

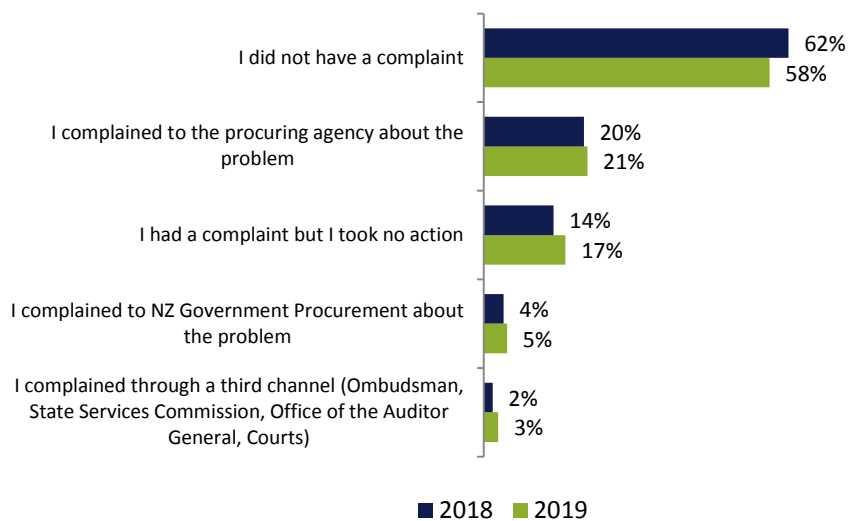


**Figure 35. Are you aware of any of the following complaint/dispute resolution processes available? (Select all that apply)**



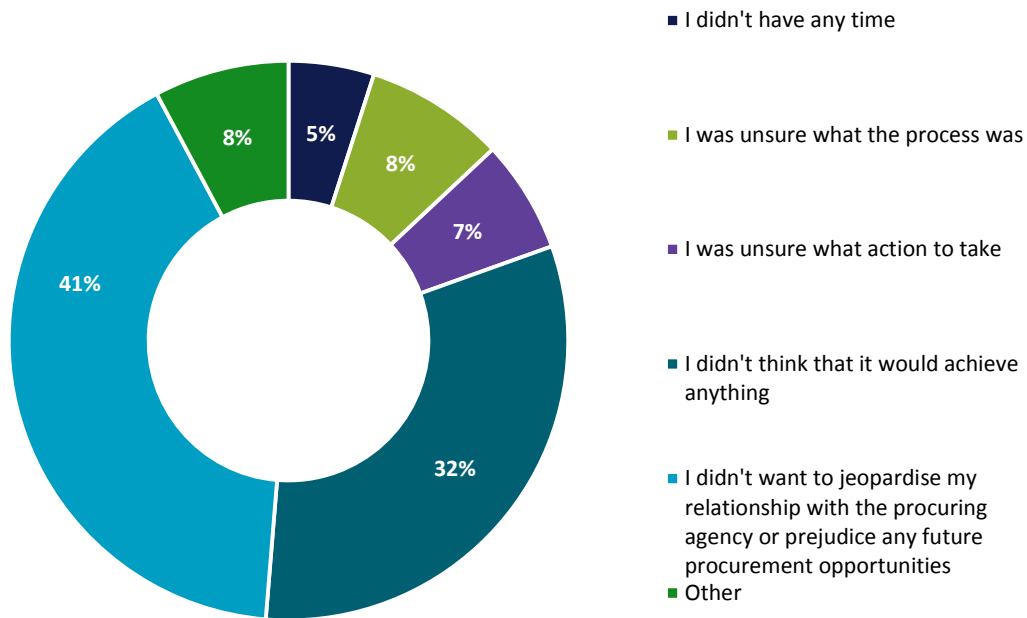
When asked about actions taken when there was a complaint, approximately 58% of businesses replied that they did not have a complaint. 17% of respondents stated they had a complaint but took no action, 21% complained to the procuring agency about the problem, 5% complained to New Zealand Government Procurement and Property about the problem, while 3% complained via a third channel. Compared to 2018, this represents an increase of businesses with a complaint (from approximately 38% in 2018 to 42% in 2019) and which took various actions in regards to the complaint, though the increase of respondents with a complaint but who did not take action from 14% to 17% should be monitored in future surveys.

**Figure 36. If you had a complaint, which of the following did you do? (Select all that apply)**

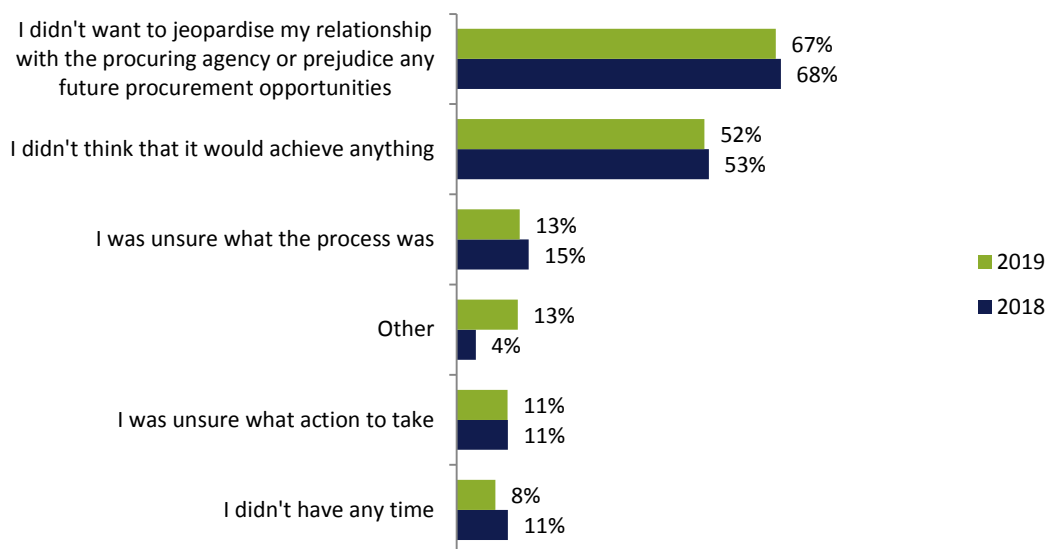


In regards to why businesses did not take action when they had a complaint, a majority (41%) cited that they did not wish to jeopardise the relationship with the procuring agency or prejudice any future procurement opportunities. This is similar to 2018.

**Figure 37. Why didn't you take any action on your problem? (Select all that apply)**



**Figure 38. Why didn't you take any action on your problem? (Select all that apply)**

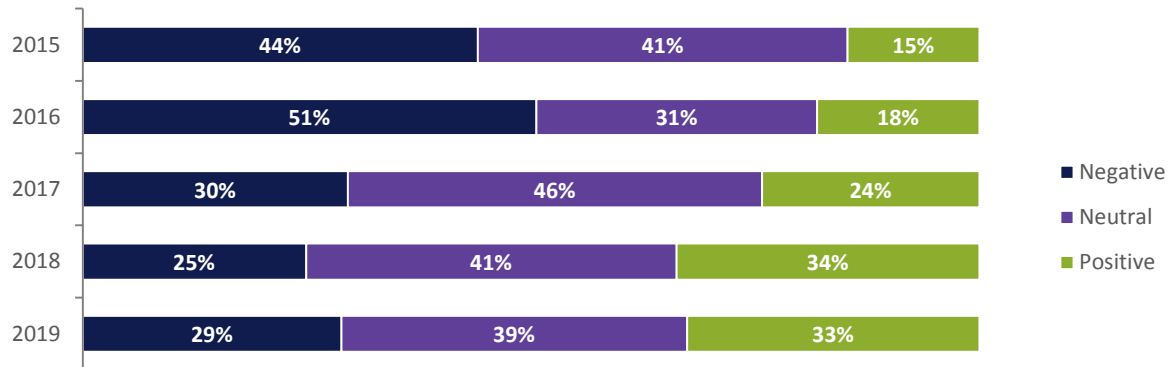


## 7. Overall Quality of Procurement

Overall, government procurement activity in New Zealand in 2019 compares favourably to the years prior to 2018, but does not, for the most part, exceed new milestones set in 2018. Figure 39 shows

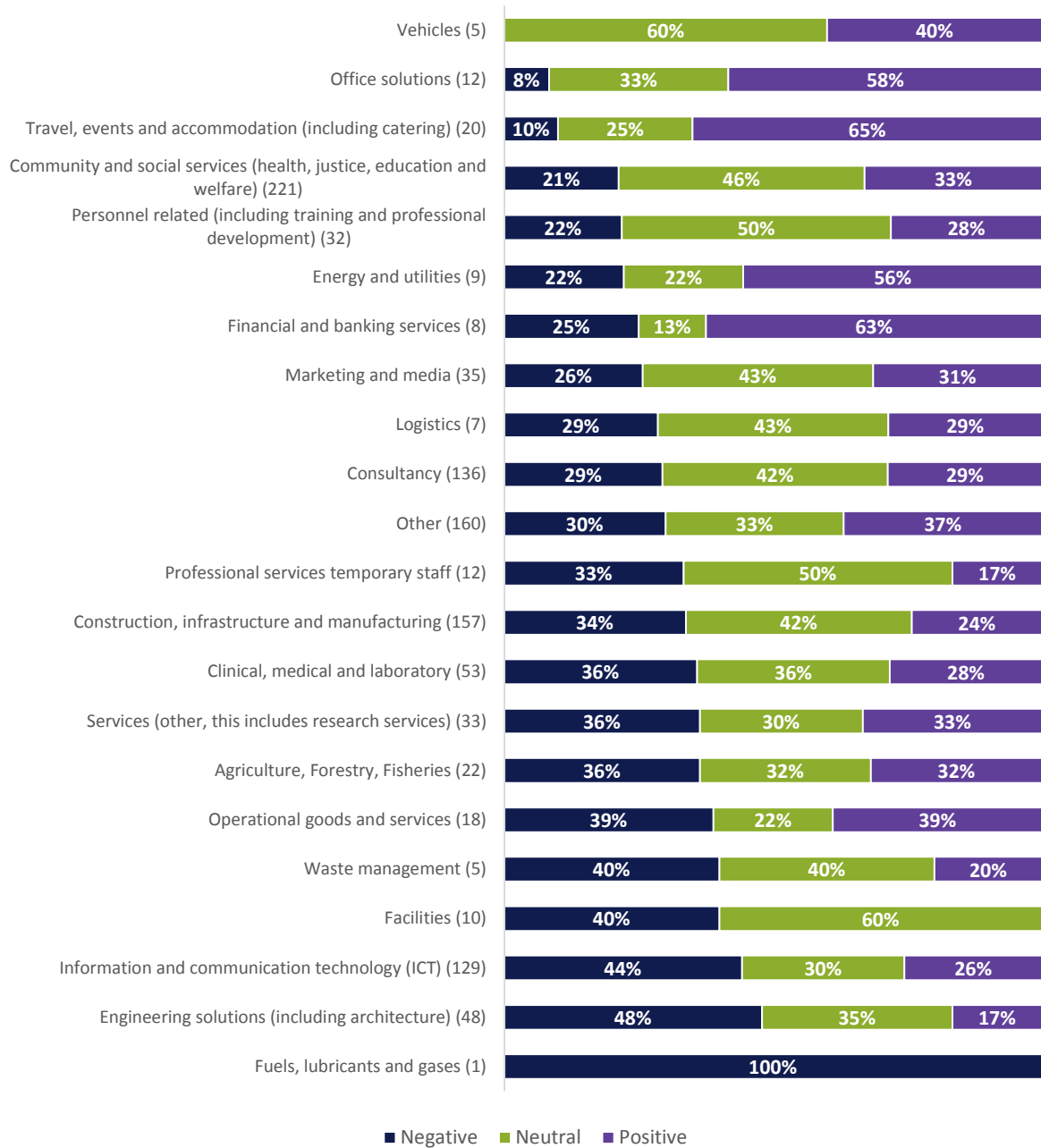
the rating businesses gave for government procurement activity overall for the years 2015 – 2019. The 2019 results are similar to the 2018 results in that 33% of respondents provided either a ‘good’ or ‘very good’ rating compared to 34% in 2018. However, there has also been an increase in respondents providing a ‘poor’ or ‘very poor’ rating (up by 4% from 2018) and a corresponding decrease in ‘average’ ratings from 2018 to 2019. The increase of ‘poor’ and ‘very poor’ ratings represents a concerning development that will need to be monitored closely in future surveys.

**Figure 39. Overall, how would you rate the quality of government procurement activity (including initial engagement, tender activity, contract management and supplier relationships)?**



To gain a clearer picture of where concerns lie, the responses for overall quality of government procurement activity in 2019 were traced back to industry sectors as to how respondents identified themselves in terms of their main field of business. Figure 40 provides an overview of the ratings different industry sectors provided in regards to overall quality of government procurement activity, together with response sample sizes by industry sector.

**Figure 40. Overall quality of government procurement activity 2019 by main field of business**



Engineering solutions (including architecture), the ICT, and the waste management sectors provided the most negative ratings, with 48%, 44% and 40% respectively. Travel, events and accommodation (including catering) as a sector provided the most positive responses with 65% of respondents issuing a positive rating for overall government procurement activity, followed by financial and banking services (63%) and office solutions (58%). Of these sectors, waste management and financial and banking services yielded sample sizes of less than 10.

