

EU Open Digital Ecosystems Consultation Analysis

Domain: procurement - Complete Analysis

Documented Insights Analysis System

February 2026

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EU Open Digital Ecosystems Consultation

Public Procurement

Analysis date 07 February 2026

Domain scope Public sector procurement practices, barriers, and reform proposals

Commission context EU procurement directives, transparency requirements, SME access

Executive Summary

This domain received substantial engagement across the consultation, with 429 responses (25.9% of corpus) addressing related themes. Respondents from 37 countries and 9 stakeholder types contributed, indicating broad interest across the EU.

Market Sentiment Overview

Coverage and Engagement

Metric	Value
Matching responses	429
Coverage of corpus	25.9%
Countries represented	37
Stakeholder types	9

Metric	Value
Organisations	185
Responses with attachments	102

Stakeholder Positions

The consultation response was dominated by EU Citizens (52.9%), followed by Companies (25.4%). This distribution suggests strong grassroots interest rather than primarily industry-driven advocacy.

Stakeholder Type	Responses	Countries	Percentage
EU Citizen	227	25	52.9%
Company	109	20	25.4%
NGO	35	12	8.2%
Non EU Citizen	15	10	3.5%
Business Association	14	6	3.3%
Academic Research Institution	13	7	3.0%
Public Authority	8	5	1.9%
Other	7	7	1.6%
Environmental Organisation	1	1	0.2%

Geographic Distribution

Geographic engagement shows concentration in Germany (22.4%), with notable participation from Netherlands and Italy. The distribution across 37 countries indicates EU-wide relevance rather than localised concern.

Country	Responses	Percentage
Germany	96	22.4%
Netherlands	52	12.1%
Italy	44	10.3%
France	40	9.3%
Belgium	31	7.2%
Austria	23	5.4%
Spain	21	4.9%
Poland	18	4.2%
Portugal	13	3.0%
United States	12	2.8%
United Kingdom	11	2.6%
Sweden	8	1.9%
Romania	7	1.6%
Finland	7	1.6%
GRC	6	1.4%

Term Usage Patterns

Analysis of term concentration reveals how strongly specific concepts feature in responses compared to the broader consultation corpus. A strength score above 1.5 indicates the term appears more frequently in this domain than in general discussion.

bidding (strength: 3.9) Highly concentrated in this domain (appears 3x+ more than in general corpus)

Positive framing – Used with: enable, enabled, opportunity

Critical framing – Discussed alongside: difficult

contract (strength: 3.2) Highly concentrated in this domain (appears 3x+ more than in general corpus)

Positive framing – Used with: support, benefits, improve

Critical framing – Discussed alongside: fail, barriers, insufficient

supplier (strength: 2.8) Moderately concentrated in this domain

Positive framing – Used with: advantage, enables, support

Critical framing – Discussed alongside: barrier, black, barriers

procurement (strength: 2.2) Moderately concentrated in this domain

Positive framing – Used with: support, supporting, strengthen

Critical framing – Discussed alongside: barriers, lack, limited

tender (strength: 2.1) Moderately concentrated in this domain

Positive framing – Used with: support, advantages, supports

Critical framing – Discussed alongside: barriers, lack, barrier

Sentiment and Advocacy Patterns

Language analysis reveals the tone and advocacy intensity of responses addressing this domain.

Language Pattern	Percentage of Responses
Action-oriented language	46.6%
Problem-focused language	41.0%
Solution-focused language	52.2%

Strong advocacy for specific actions – Advocacy level: High

Related Themes and Context

Terms that frequently co-occur with domain concepts reveal the broader context in which respondents frame this policy area.

Co-occurring Term	Occurrences	Documents	Document %
open	394	394	91.8%
source	353	353	82.3%
software	325	325	75.8%
public	315	315	73.4%
digital	294	294	68.5%
european	282	282	65.7%
vendor	271	271	63.2%
sovereignty	261	261	60.8%

Co-occurring Term	Occurrences	Documents	Document %
support	257	257	59.9%
infrastructure	240	240	55.9%
security	231	231	53.8%
lock-in	231	231	53.8%
open-source	220	220	51.3%
procurement	213	213	49.7%
solutions	212	212	49.4%
projects	204	204	47.6%
data	200	200	46.6%
funding	197	197	45.9%
critical	194	194	45.2%
maintenance	189	189	44.1%

Sub-theme Distribution

Responses addressing this domain cluster around distinct sub-themes, revealing specific areas of concern or opportunity. Note that responses may address multiple sub-themes.

Sub-theme	Responses	Percentage
Barriers	291	67.8%
Transparency	207	48.3%
Reform	49	11.4%
Process	29	6.8%
Sme Access	26	6.1%

Policy Considerations

Market Structure Signals

- Strong grassroots engagement suggests public concern extends beyond industry advocacy

Advocacy Intensity

- High action-oriented language indicates stakeholders expect policy intervention

Geographic Considerations

- Broad geographic engagement suggests EU-level relevance

Methodology

This analysis examines consultation responses through domain-specific keyword and keyphrase matching. Coverage statistics indicate the proportion of responses addressing the domain. Term usage strength compares domain-specific frequency to corpus-wide frequency. Sentiment analysis identifies language patterns without attributing positions to individual respondents.

Search parameters 31 terms (8 keywords, 23 keyphrases)

Analysis date 07 February 2026

LLM Position Analysis - Procurement

Generated: Sat Feb 7 21:22:39 2026

Stakeholder Positions

LLM Processing Status: 1129 responses analysed across all domains (68.1% complete, 481 remaining). **This domain:** 151 responses. Results are partial and will update as processing continues.

Analysis of positions extracted through LLM analysis of consultation responses. Extracted 396 positions across 18 categories.

Position Overview

Position Category	Support	Oppose	Neutral/Mixed	Total
Procurement Preference	181	10	0	191
Public Funding	126	9	1	136
Digital Services Tax	34	7	0	41
State Aid	6	2	0	8
Tax Incentive	0	3	1	4
Vat Exemption	3	1	0	4
Corporate Influence	0	1	0	1
Market Integration	1	0	0	1
Non Eu Monopoly	0	1	0	1
Abuse Of Power	0	1	0	1
Vendor Lockin	0	1	0	1
Maintenance	1	0	0	1
Help With Certification	1	0	0	1
Responsible Disclosure	1	0	0	1
Extended Right To Repair	1	0	0	1
Market Structures	0	0	1	1
Funding	1	0	0	1
Copyleft License	1	0	0	1

Detailed Position Analysis

Procurement Preference

Total responses 191 positions extracted across 2 distinct responses

Support position 181 responses (94.8%), 59.1% express strong advocacy

Primary stakeholders (support) EU Citizens (106), Companies (37), NGOs (14)

Core arguments (support) The Public Product Organization model directly addresses many of the barriers identified by the Commission, providing a sustainable framework for public organizations and their vendors to collaboratively develop, maintain, and govern shared open-source solutions.; EU can play a crucial role in enabling municipalities to rely on interoperable, secure, and sustainable digital public infrastructure by creating an EU-wide procurement framework that favors open source.

Opposition position 10 responses (5.2%), 10.0% express strong opposition

Core arguments (oppose) Open source is crucial for control over technology, proprietary vendors work above the law.; American companies have control of the market of legacy software, which allows them to flood the market with additional products without fearing competition from European vendors.

Specific proposals mentioned Use public procurement as a tool (2 mentions); All public money should result in public code. (1 mentions); Cap passthrough fees (1 mentions)

Evidence cited attached PDF (2); FSFE submission (2); France's SILL already provides a national model of recommended open-source software for public administration. (1); the chinese have HarmonyOS... (1); <https://openssf.org/blog/2025/09/23/open-infrastructure-is-not-free-a-joint-statement-on-sustainable-stewardship/> (1)

Public Funding

Total responses 136 positions extracted across 3 distinct responses

Support position 126 responses (92.6%), 26.2% express strong advocacy

Primary stakeholders (support) EU Citizens (72), Companies (30), NON_EU_CITIZEN (7)

Core arguments (support) EU can play a crucial role in enabling municipalities to rely on interoperable, secure, and sustainable digital public infrastructure by establishing long-term, structural EU funding for open digital infrastructure.; Well designed financial support through grants, public procurement, and long term maintenance funding would allow European FOSS solutions to grow and become viable alternatives.

Opposition position 9 responses (6.6%), 0.0% express strong opposition

Core arguments (oppose) The use of proprietary software creates vendor lock-in, limiting the state's ability to migrate data or change providers without significant costs.; The financial allocation for ZenDiS is a joke compared to the annual license fees paid to non-EU companies.

Specific proposals mentioned Contracts with outside experts or contributors funded and designed based on regular pay for time worked at a rate appropriate to the software industry. (1 mentions); Direct funding for the maintenance and security of core open protocols like Matrix. (1 mentions); ecosystem diversity funding: support 35 platforms per use case to avoid winnertakesall (1 mentions)

Evidence cited see the GNOME project (2); EU-backed, open healthcare AI ecosystems could deliver immense public value by ensuring compliance with European law and supporting local data processing. (1); coreboot.org (1); France's SILL already provides a national model of recommended open-source software for public administration. (1); <https://responsibility-by-design.anvil.app> (1)

Digital Services Tax

Total responses 41 positions extracted across 2 distinct responses

Support position 34 responses (82.9%), 2.9% express strong advocacy

Primary stakeholders (support) EU Citizens (17), Companies (6), ACADEMIC_RESEARCH_INSTITUTIONS (3)

Core arguments (support) Crucial for reaching these goals is coordination and legislation to enforce generic compatibility and interchangeability and to ban tool and vendor lock-in.; DIGITAL SME supports the boost of made-in-Europe solutions in AI, digital public infrastructure and all the critical tech layers that are key to attain tech sovereignty.

Opposition position 7 responses (17.1%), 0.0% express strong opposition

Core arguments (oppose) Taxing proprietary vendors is not a solution to data protection concerns.; Major commercial digital business players may use tactics like delayed support for OSS platforms to maintain market position.

Evidence cited US hostility towards EU (1); total cost of ownership is frequently underestimated (1); <https://openssf.org/blog/2025/09/23/open-infrastructure-is-not-free-a-joint-statement-on-sustainable-stewardship/> (1); 2. DATA AS INFRASTRUCTURE: Open Data has a massive impact on a lot of economic sectors (1); <https://op.europa.eu/en/publication->

State Aid

Total responses 8 positions extracted across 2 distinct responses

Support position 6 responses (75.0%), 33.3% express strong advocacy

Primary stakeholders (support) EU Citizens (4), Companies (1), NON_EU_CITIZEN (1)

Core arguments (support) Well designed financial support through grants, public procurement, and long term maintenance funding would allow European FOSS solutions to grow and become viable alternatives.; The EU should use the Interoperable Europe Act to ensure that cybersecurity training in schools and universities is vendor-neutral and emphasizes FOSS tools.

Opposition position 2 responses (25.0%), 0.0% express strong opposition

Core arguments (oppose) Public subsidies for open source projects may not be effective due to governance and accountability issues.; Public subsidies for OSS projects are not mentioned as a solution to data protection concerns.

Specific proposals mentioned Dismantle Proprietary Lock-in (1 mentions); providing direct and sustainable financial support for European Free and Open Source Software applications (1 mentions)

Tax Incentive

Total responses 4 positions extracted across 2 distinct responses

Opposition position 3 responses (75.0%), 0.0% express strong opposition

Core arguments (oppose) Proprietary providers process sensitive patient data, where on-premise, privacy-preserving alternatives should exist.; The EU should not provide tax incentives for proprietary vendors, but the text does not explicitly mention this.

Vat Exemption

Total responses 4 positions extracted across 2 distinct responses

Support position 3 responses (75.0%), 0.0% express strong advocacy

Primary stakeholders (support) EU Citizens (2), NGOs (1)

Core arguments (support) The EU should exempt open-source vendors from VAT to promote their adoption.; Exempting VAT on Open Source adoption/development would help the foundation's budget.

Opposition position 1 responses (25.0%), 0.0% express strong opposition

Core arguments (oppose) VAT exemptions for open source adoption may not be necessary due to low or zero licensing costs.