

Innovation Procurement
Empowerment Centre (IPEC)

ANNUAL SENTIMENT ANALYSIS (2023-24) FIRST EDITION

INTRODUCTION



IPEEC conducted this sentiment analysis to identify some key challenges local authorities face in driving innovation through procurement.

By understanding these barriers, Innovation Procurement Empowerment Centre (IPEEC) is better placed to effectively support public sector agencies to solve their problems better, cheaper or faster through using procurement as an enabler for innovation. Innovation Procurement, or innovation-friendly procurement, is vital for stimulating innovative solutions and enhancing procurement processes. It is central to the Government's growth strategy, as highlighted in the 2020 Green Paper *Transforming Public Procurement* and the 2023 Procurement Act.

Our survey, conducted from December 2023 to March 2024, gathered 114 responses, predominantly from local government. Further in-depth consultations engaged 15 stakeholders from 12 organisations involved in public procurement, helping us gain a clearer picture of the challenges that hinder innovation and inform future support.

Rikesh Shah, Head of IPEEC comments:

Currently the UK public sector spends over £380 billion on third party goods and services every year, so is in a great position to shape new markets through innovation.

Innovation is critical to the public sector to ensure we can get more with our spend, and at the same time, create new innovative products that could be sold around the world.

It is becoming increasingly apparent that the UK Government sees innovation as central to economic growth. Public procurement is recognised for its potential to drive innovation in a number of Government strategies and in the Procurement Act 2023 – which comes into force next February – the culmination of a decade of reforms in public procurement.

Sometimes authorities fall into a trap of trying to do everything themselves, but public bodies need to work with the market to co-create new ideas and solutions. A key starting point is to define a problem and go out to the market with a mission-focused approach and setting out the right procurement conditions to successfully scale a solution.

The hope is this work makes clear the nature of the problem that professionals face in this field, and can signpost how future solutions might navigate the 'problem' of procurement.

We are delighted that Innovate UK has funded Connected Places Catapult to develop and run the Innovation Procurement Empowerment Centre. IPEEC is leading on a wide range of programmes from practical guidance on mission-led procurement on specific challenges; creating the right culture for innovation to scale.

It also creates empirical academic evidence on innovation through procurement, up skills colleagues in the public sector to be more entrepreneurial and provides new case studies and knowledge sharing opportunities through a community. As such, the findings from this research will inform future activity.

Innovation in the public sector is about creating value: doing things better, cheaper or quicker over a period of time. But it is not always about technology or building shiny new products, or even quick short-term outcomes.

There could be a particularly difficult problem to solve or a strategic, emerging theme that needs addressing around policy, processes or people. In all of these cases, leaders should be encouraged to look at their issues through the lens of problem solving, experimenting, working in collaboration with the market, internal alignment and innovation, and ultimately creating the right culture and platform for innovation to thrive.

There needs to be a fundamental shift around how the public sector shapes markets bringing in companies of all sizes to accelerate innovation.

The focus to deliver better outcomes, and doing more with less, is very pressing across the public sector at local, regional and national levels.

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Research findings

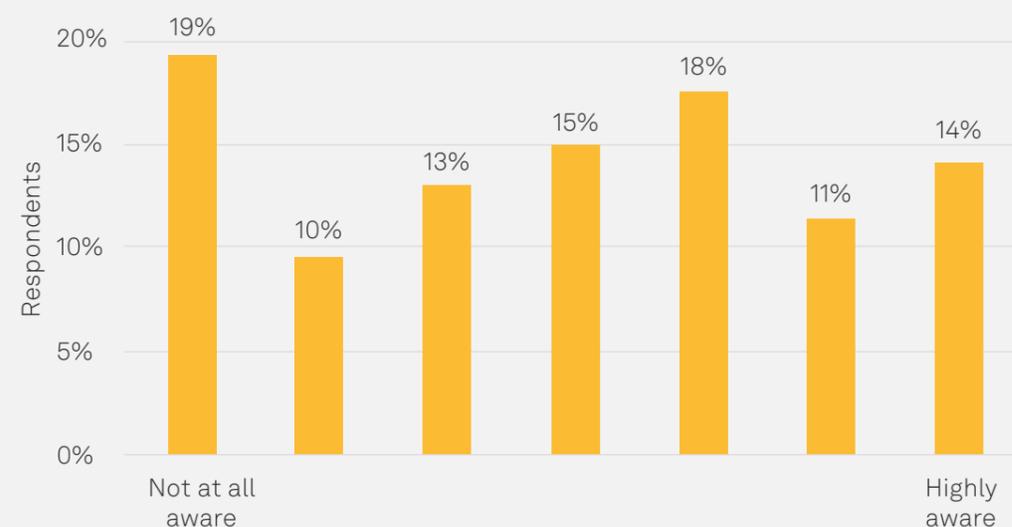
The following highlights the key findings obtained from two essential research components: the online survey and in-depth consultation interviews with stakeholders across the public sector. The interviews aimed to provide a comprehensive exploration of the issues examined in this study, specifically focusing on the understanding and awareness of Innovation Procurement.

Awareness of Innovation Procurement

How aware were you of the concept of Innovation Procurement (or Innovation-friendly Procurement)?

The survey results indicate that Innovation Procurement is still considered a comparatively 'young' subject area, and awareness across the public sector is limited. 14% of survey respondents said they were highly aware of the concept, but 19% said they were not at all aware, as shown in Figure 1.

Figure 1: Respondents' prior awareness of Innovation Procurement



Source: Ortus/IPEC Survey 2023/24

The consultation findings indicate that staff in innovation and transformation roles are considered to have a greater awareness of Innovation Procurement, in large part because it is seen as a mechanism by which core goals can be achieved.

The associated terminology is perceived as quite confusing, with several terms – Innovation Procurement, innovation-friendly procurement, innovative procurement – used interchangeably. This is commonly cited as a barrier to greater understanding. Interviewees also indicated that the term 'procurement' is often interpreted very narrowly within public organisations, where it is commonly interpreted to mean the professional function engaged in contracting for goods and services.

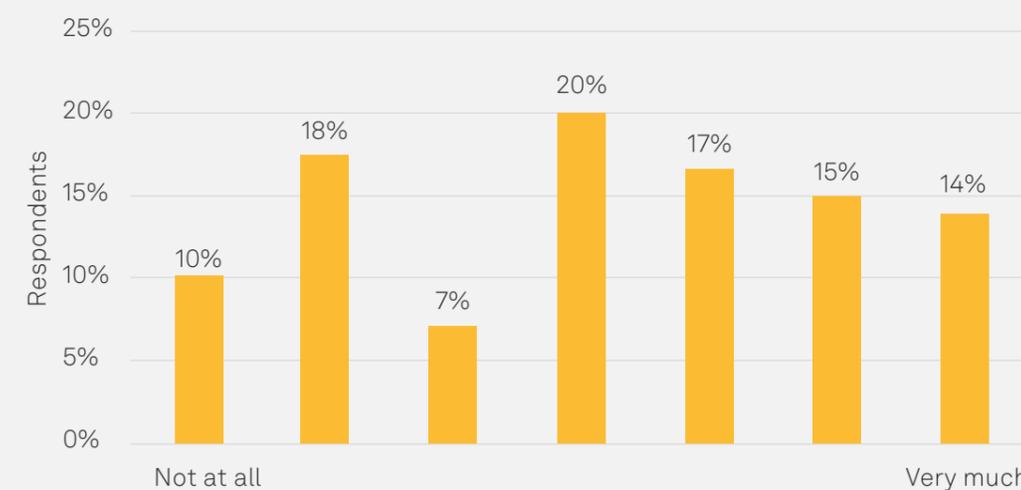
However, interviewees argued that procurement is in fact a much more organisation-wide practice than this interpretation suggests, where a wide range of roles across services are in fact involved in a range of ways, from identifying need, specifying the required outcome or good/service, determining budgets and spending priorities, working with legal

or procurement colleagues to engage suitable suppliers and then managing those contracts and the acceptable delivery of the purchased goods or services. As well as a need to clarify terminology in relation to Innovation Procurement, therefore, there appears also to be an evidenced need to develop understanding of the influence and function that **a wide range of roles contribute to the procurement process**. These are organisation-wide matters, not solely the preserve of colleagues in procurement or legal teams.

There is clearly much work to do to develop the role of procurement in unlocking innovation – both as a process within a public organisation and into it through the supply chain. The survey indicates that although procurement is seen by government as a key part of driving innovation and therefore economic growth, not all survey respondents perceived public procurement to be an enabler of innovation.

To what extent do you perceive public procurement to be an enabler of innovation?

Figure 2: Extent to which respondents believe public procurement is an enabler of innovation



Source: Ortus/IPEC Survey 2023/24

The consultation suggests that while the new guidelines which are forthcoming through the Procurement Act 2003 are broadly welcomed, some interviewees are sceptical that they will drive transformational change. For example, new tools and approaches enabled by changes in legislation in 2015, while very welcome and having had some impact, have not been fully exploited.

What challenges are you facing when it comes to procuring innovation from the market?

The key issues that have held back wider adoption were identified as cultural issues within procurement teams, risk-aversion and the limited way in which organisations have sought to drive Innovation Procurement from the top down, via those in leadership roles. Cultural change, and change to well-established working and professional practices (both of which are clearly needed to introduce wider

adoption of Innovation Procurement) take time and are driven by strategic intent. This intent must come from those in leadership positions who recognise the need for a long-term focus on organisational change. Whilst communications and public relations are important tools for those seeking to encourage Innovation Procurement, the wider need is to support organisations to recognise the importance of Innovation Procurement, develop skills and expertise across the organisation and to find ways to safely adopt new practices whilst limiting organisational and personal risk in doing so.

Other factors identified include the limited resources available to public organisations to invest in the development and implementation of new approaches, the difficulties experienced in filling available procurement vacancies (and others across departments), both of which were considered as becoming more acute in nature.



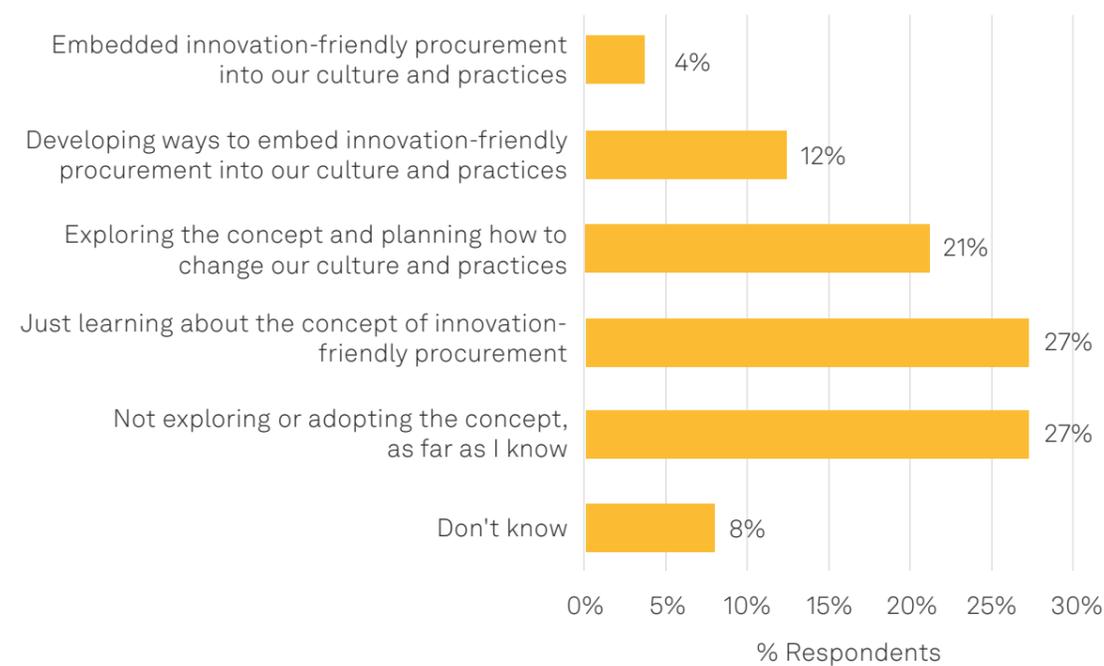
Adopting Innovation Procurement

Which of the following statements best describes your organisation with respect to innovation-friendly procurement?

Few survey respondents (4%) said their organisations had embedded Innovation Procurement into their culture and practices to date, as shown in Figure 3. Whilst just over one quarter (27%) of respondents' organisations were not yet exploring or adopting the concept of Innovation Procurement (as far as the respondent was aware), were just learning about the concept or were exploring the concept and planning how to change their culture and practices in response. Furthermore, 12% of respondents indicated that their organisation was currently

developing ways to embed Innovation Procurement into their culture and practices. These results further demonstrate the scale of opportunity in the Innovation Procurement space. In total, 60% of organisations represented by survey respondents were learning about, exploring or developing ways to embed Innovation Procurement. This indicates that organisations are typically at the beginning of their journey regarding Innovation Procurement, and consultation interview suggest that during these stages, such organisations recognise the need for support to unlock opportunities to implement such approaches and enjoy the benefits (whilst minimising and mitigating risk).

Figure 3: Adoption of Innovation Procurement



Source: Ortus/IPEC Survey 2023/24

The consultation revealed that drivers of engagement with Innovation Procurement can be varied, and discussions identified the following as examples of drivers that have led to such engagement:

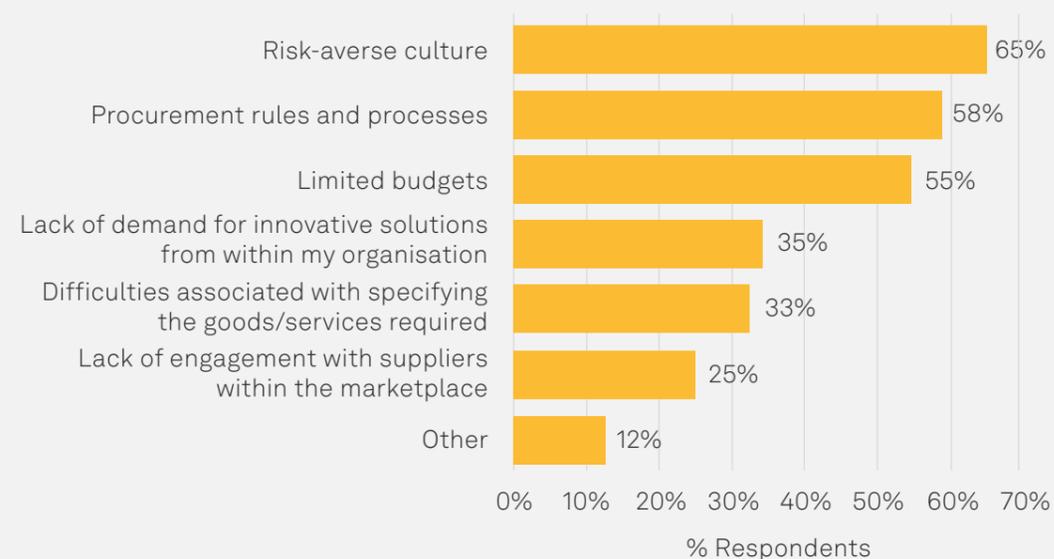
- **Policy drivers** – for example, an economic development team might seek to employ Innovation Procurement to stimulate wider economic growth.
- **Transformation drivers** – novel solutions might be sought to drive digital transformation within a particular service.
- **Best value drivers** – better and more efficient use of public money and resources may result in the seeking of innovative solutions.

Challenges and barriers to Innovation Procurement

What challenges are you facing when it comes to procuring innovation from the market?

Survey respondents were asked to identify the key challenges experienced when seeking to procure innovation from the supply chain. The responses indicated that **a risk averse culture (65%), current procurement rules and processes (58%) and limited budgets (55%) are the three most significant challenges to procuring innovation, as shown in Figure 4.**

Figure 4: Challenges with procuring innovation



Source: Ortus/IPEC Survey 2023/24

The results also indicate that, for just over one third of respondents (35%), there is a perceived lack of organisational demand for innovative solutions. This is an interesting finding, and demonstrates a clear need to adjust the culture and cross-organisational working practices within public organisations if objectives associated with transforming procurement are to be met. Procurement teams are often cited as a barrier to Innovation Procurement, and whilst in some cases that may well be the case, they are unlikely to be the ultimate driver of Innovation Procurement. This needs to come from across the organisation and driven from the top down. It also demonstrates the importance of addressing the perception that a limited range of functions and roles are engaged in procurement. Demand for innovative solutions is driven from teams and individuals that utilise the goods and services being procured, meaning that procurement is in fact a cross-organisational exercise.

The survey also highlights that one third of organisations (33%) experience difficulties with specifying the goods and services required. It is expected that the new procurement regulations will encourage more 'outcomes-based' specification, and the survey findings suggest that there is a need for support to develop the skills and approaches needed to adopt such practices – again, across the organisation rather than solely within procurement teams.

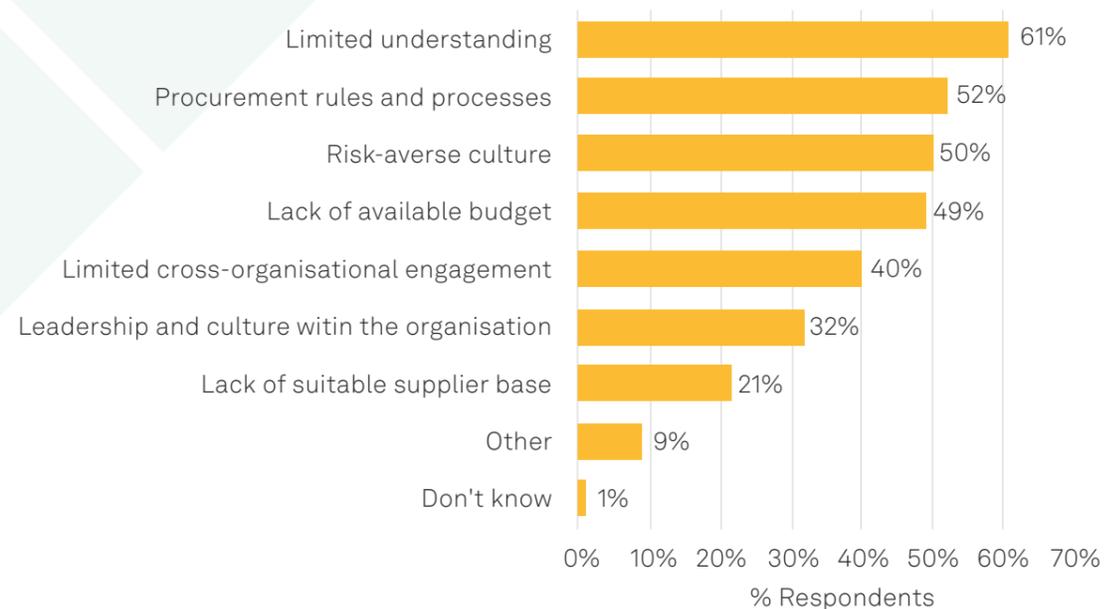
These comments are further supported by the evidence presented in Figure 5 below, which identifies the proportion of survey respondents that identify a range of barriers to implementing Innovation Procurement.

Thinking about your organisation, what do you see as the barriers and challenges to implementing innovation-friendly procurement?

As Figure 5 shows, a limited understanding of the concept is the biggest barrier to implementing Innovation Procurement (61%), followed by current procurement rules and processes (52%), a risk-averse culture (50%) and lack of available budget (49%).

It is also interesting to note that one in five respondents (21%) identified a lack of suitable supplier base as a barrier. The depth interviews touched on the important matter of market engagement. This is another exercise which organisations find challenging, for a number of reasons. These include because they are unsure of, or not practised in engaging with innovative suppliers, a lack the resource to invest time and effort to do so, or they consider such practices a challenge to transparency and accountability. Again, such challenges are not insurmountable with the appropriate support to develop understanding, awareness and the skills/expertise needed to introduce this important element to the wider process of procurement.

Figure 5: Barriers to implementing Innovation Procurement



Source: Ortus/IPEC Survey 2023/24

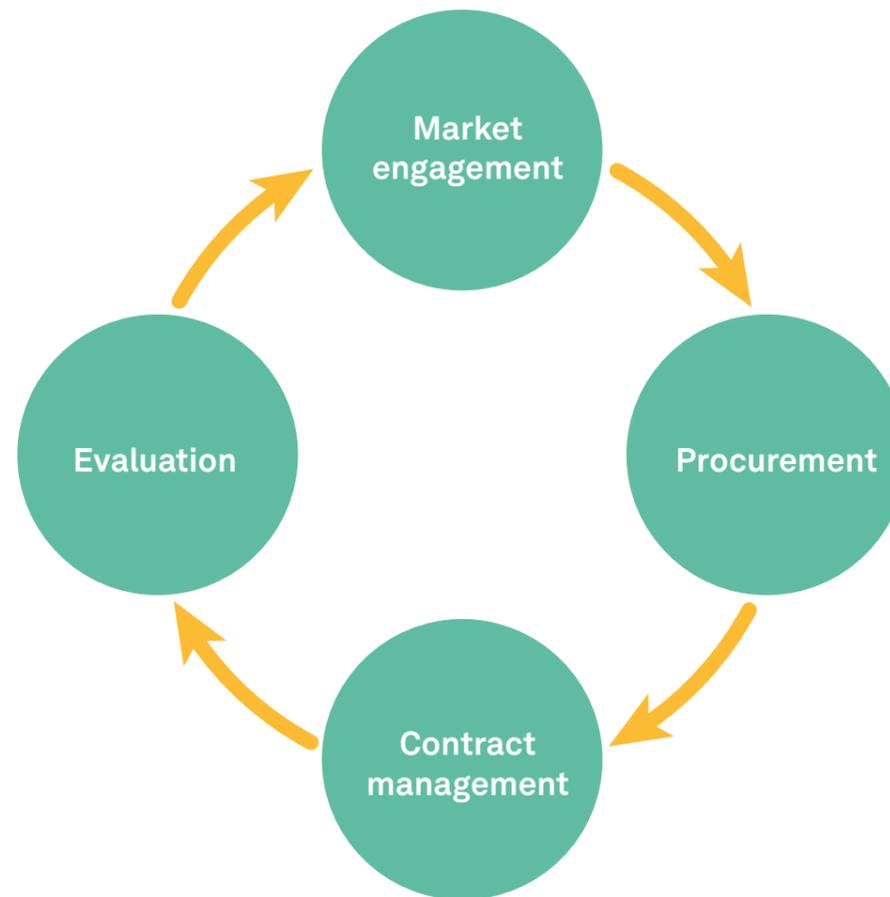
Consultees suggested that compared with 'traditional' procurement, Innovation Procurement requires more up-front work, which can be a barrier in an increasingly time- and money-constrained environment. For example, developing an outcomes-based specification, and ensuring that procurement and legal teams are supportive of proposed procurement approaches (and the contract management and evaluation practices that follow on from them).

Pressures around funding and resources within the public sector are acute, and consultees recognised that change is even more necessary but funding and resources to invest in change are increasingly scarce. This could have the effect of constraining

progress in adopting Innovation Procurement approaches. In addition, it also demonstrates that the IPEC's audience is likely to be time poor, and the consultation interviewees indicated that one consequence of this was a preference to consume information that was delivered as short, easily-digestible outputs.

Successful adoption of Innovation Procurement practices is seen to require development in related areas, to include contract management and evaluation. This emphasis on the 'whole lifecycle' is supported by the new procurement regulations, and leads to the conclusion that the value of IPEC's support will be maximised if it covers all four elements shown in Figure 6.

Figure 6: Innovation Procurement 'Whole Lifecycle'



Source: Ortus Economic Research 2024

The findings presented in this section are important indicators of the key challenges faced by public sector organisations when seeking to adopt Innovation Procurement approaches. They speak to a clear need for increased awareness and understanding of the concepts and tools available, supported

by the development of skills and expertise in adopting Innovation Procurement approaches and how contracts procured through these approaches should be managed and performance evaluated.

Benefits of Innovation Procurement

Has your organisation already begun to experience benefits from adopting or exploring innovation-friendly procurement?

The survey results indicate that 19% of respondents believe their organisation had begun to see benefits from adopting or exploring Innovation Procurement.

Figure 4 above, which presents the results relating to the level of adoption of Innovation Procurement, indicates that 37% of organisations captured by the survey are either exploring how to embed, beginning to adopt or have adopted Innovation Procurement practices. The results suggest that a good proportion (approximately 50%) of those that are actively seeking to embed Innovation Procurement are reporting benefits. Given the long-term nature of the process of adoption and contracts that emanate from it, this is an encouraging result. It also suggests that exists a potential body of evidence regarding benefits which could be explored further, with the view of building a deeper knowledge base that can be shared.

Given the level of adoption reported in the survey, it is also not surprising to see that 39% of respondents said they had not yet begun to see benefits, and 42% did not know. The most common benefits experienced by respondents include improved relationships with suppliers, stimulating internal or external innovation, achieving better value for money (all 48%), increased efficiency and effectiveness of public services, and staff motivation (both 38%).

Similarly, the consultation showed that Innovation Procurement practices are delivering a range of benefits to organisations utilising them. These include improved flexibility, low-risk experimentation with innovative products/ services, achieving a broadening of the supplier base, adoption of innovative solutions and cost savings.

Two specific benefits were identified in the consultation interviews which are particularly noteworthy. The first is the ability for Innovation Procurement practices to encourage innovative SMEs to engage with public procurement.

This is seen as an essential outcome for Innovation Procurement to be truly successful. Not that it is the goal to exclude large, well-established businesses from contract procured through these routes, of course. Moreover, the encouragement of SME engagement is seen as important from three perspectives. The first relates to the achievement of economic development policy objectives, including supporting growth amongst local, smaller businesses with the potential to grow, and encouraging innovation. The second relates to addressing issues which may have discouraged SMEs from engaging with public procurement in the past, particularly around responding to the bureaucratic requirements of procurement processes. The third reason that SME engagement is important recognises their innovative capability and disruptive potential. Consultees indicated that two major shifts in practice are needed to encourage more SME engagement; early market engagement and adoption of simpler procurement procedures that lower the bar in terms of the bureaucratic overhead.

A second important benefit identified by consultees is that Innovation Procurement has the potential to deliver against multiple organisational objectives at once:

there is a 'benefits multiplier' effect when done successfully. For example, procuring an innovative service provides an innovative supplier with an often crucial opportunity to demonstrate the efficacy and efficiency of their solution (which provides a solid case study for further expansion in the relevant market). That solution may have a number of direct and indirect benefits to local residents, whilst also potentially saving the local authority money and achieving better procurement and best value outcomes. Alongside this, local authority staff have developed their own skills and experience in Innovation Procurement and have collaborated with procurement and other colleagues across the authority to identify and install the innovative supplier. Provided the contract is successful, a strong relationship with the supplier might evolve, which could then lead to other innovative solutions to authority challenges being developed and adopted. If the solution is a digital one, it may contribute

to digital transformation objectives within the relevant service. This hypothetical example indicates how successful Innovation Procurement can deliver positive outcomes to the commissioning authority across a broad range of strategic themes. It is important to recognise this facet of Innovation Procurement and IPEC is well placed to demonstrate and communicate this crucial aspect.

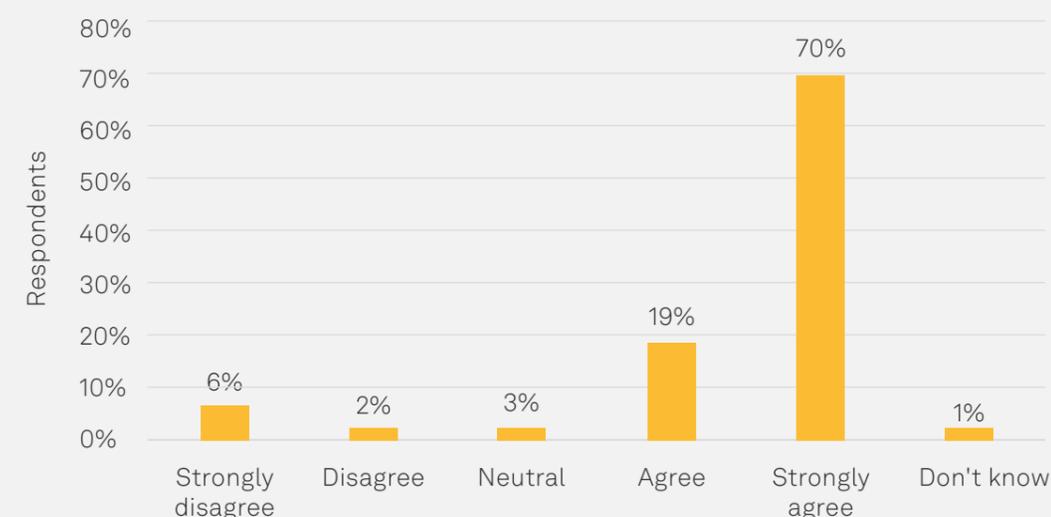
Embedding Innovation Procurement

Please indicate the extent to which you agree or disagree with the following statements.

The survey asked respondents whether they agreed with a series of statements relating to Innovation Procurement. Responses are shown in the charts below.

Most survey respondents agreed that pre-engagement with suppliers helps public sector organisations to better understand the solutions available in the marketplace, and pricing structures. Almost nine out of ten respondents agreed (89%), with 70% strongly agreeing and 19% agreeing with the statement, as shown in Figure 8.

Figure 7: Pre-engagement with suppliers allows us to better understand the solutions available in the marketplace and pricing structures

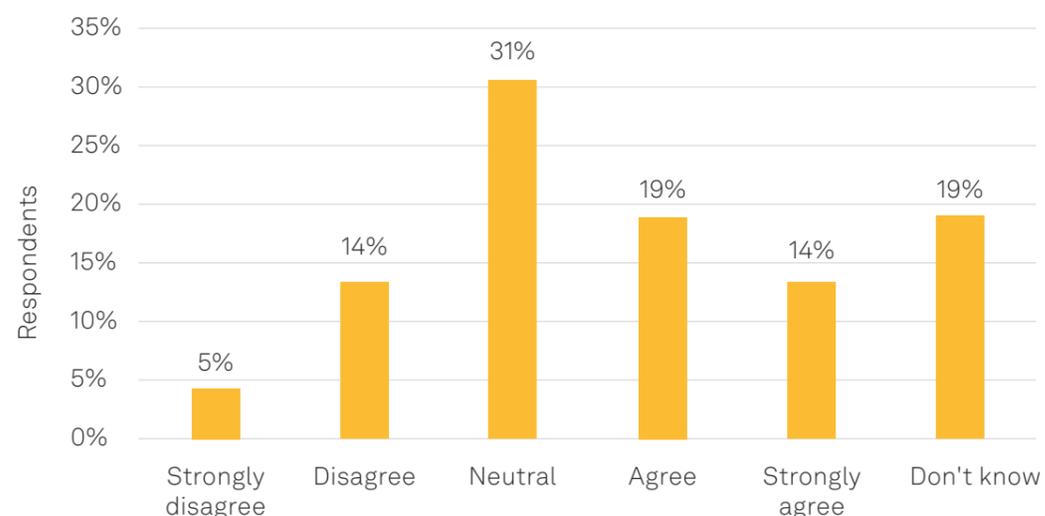


Consultees recognised that building Innovation Procurement competency and embedding practice on the demand side is crucial, but there are concerns that suppliers (particularly certain types, such as small and new businesses) may not be well placed to respond to new procurement approaches. Consultees believe that alongside supporting public organisations to adopt practices which incorporate early market engagement and are inclusive of SMEs, there may also be opportunities for IPEC to support suppliers to be Innovation Procurement ready. This recognises that there may be similar challenges associated with understanding and skill on the supplier side, and for Innovation Procurement to be successful, better practice on the demand side needs to be matched by responsive practice on the supply side.

Some survey respondents thought there are serious risks to the sustainability of key suppliers, but overall, most did not, as shown in Figure 8. This shows that 32% of respondents agreed or strong agreed that there was some risk to the sustainability of key suppliers, while 18% disagreed or

strongly disagreed and 31% were neutral. A further 19% of respondents did not know. This finding is important for a number of reasons, as confirmed by consultees. Firstly, it leads to risk for purchasing authorities that key suppliers may need to be replaced. This is also potentially an opportunity, provided the authority is in a position to do so, to introduce further Innovation Procurement exercises. However, it is acknowledged that such approaches often require considerable up-front investment of time and resource within the purchasing authority, which itself is a barrier to any rapid implementing of Innovation Procurement approaches. Secondly, any supply-side crisis will place resource pressure on a purchasing organisation, and the study has identified that resources are already very stretched within local authorities and other public organisations. Lastly, should a supplier be unable to service an existing contract, this is likely to only increase the purchasing authority's aversion to risk, which in turn may reduce the likelihood that an Innovation Procurement approach will be adopted.

Figure 8: There is a serious risk to the sustainability of key suppliers

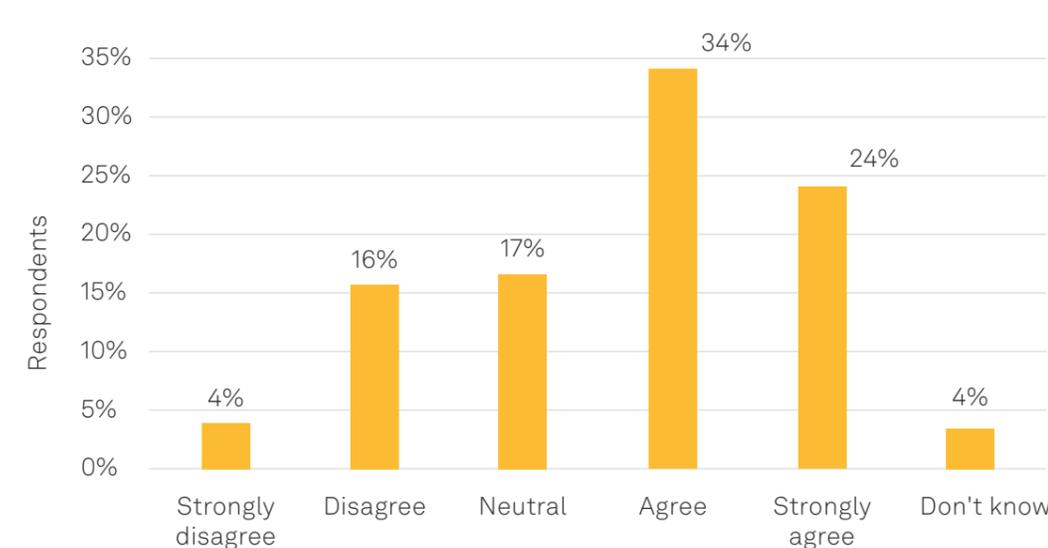


Source: Ortus/IPEC Survey 2023/24

The survey indicates that in the majority of organisations represented by the survey, the practice of collaboration between department to optimise contracts and outcomes is already in place. The findings indicate that 58% of respondents agreed or strongly agreed with the relevant statement, while 21% disagreed or strongly disagreed, as shown in Figure 9. For those organisations that have adopted collaborative approaches (around six in ten), the goal of implementing Innovation Procurement would appear to be closer than for those that have not (around two in ten). This provides further insight into the 'segmentation' of the market for Innovation Procurement within the public sector. The former category has established one important building block for Innovation Procurement, which is cross-organisational working. These organisations may require further support to understand and implement new procurement regulations to best effect, and may also need ongoing and additional support for top-down cultural change to deepen such important practices and engage a wide range of colleagues in the procurement process.

Organisations that have yet to establish cross-organisational collaboration on procurement are clearly earlier on in their journey to implementing Innovation Procurement, and are likely to require support across the full array of issues which are slowing adoption. For such organisations, developing awareness and understanding of the concepts and the opportunities that are unlocked through their adoption is also a requirement if goals associated with transforming procurement are to be achieved. Skills and knowledge development is a key part of this, coupled with work to support leaders to introduced change management approaches that achieve the longer-term objectives of cultural change through the adoption of new approaches founded on collaboration and an open and transparent approach to procurement.

Figure 9: Procurement staff work with other departments to optimise contracts and outcomes

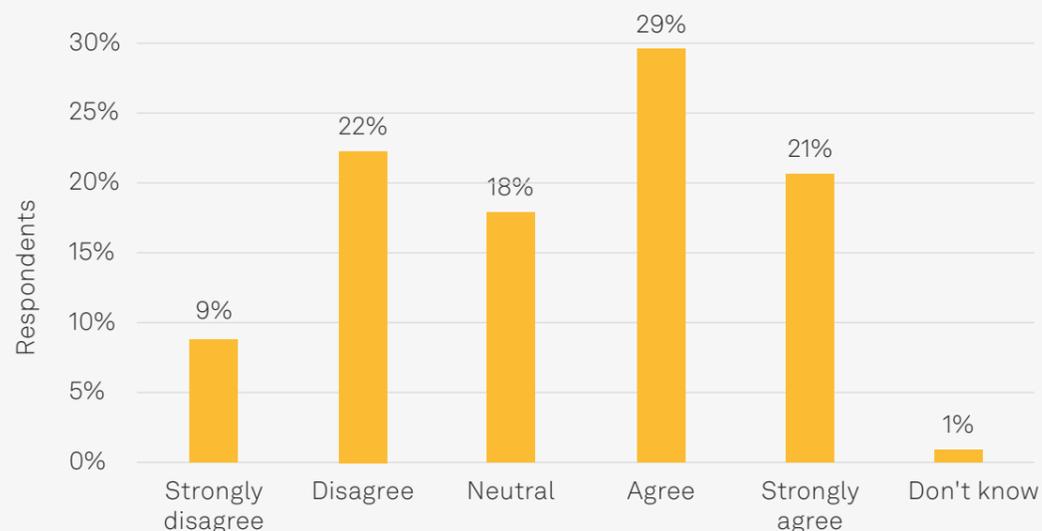


Source: Ortus/IPEC Survey 2023/24

Consultees confirmed just how important cultural change is to the successful implementation of Innovation Procurement. Numerous examples of successful practice were described, all based on collaboration across disciplines within the procuring organisation, aligned to a clear organisational goal. What these interviews also demonstrated was that a wide range of organisational goals can be the driver of collaboration within an Innovation Procurement context. For example, and as touched on in section 3.4, Innovation Procurement could be driven by goals related to digital transformation, best value or better procurement, economic development objectives (which may also include goals in relation to innovation support and stimulation) amongst others.

Overall, survey respondents were more likely to agree than to disagree that most procurement decisions are based on cost, but as shown in Figure 11 there was no strong consensus. It shows that 50% of respondents agreed or strongly agreed that most procurement decisions are based on cost, while 31% disagreed or strongly disagreed.

Figure 10: Most procurement decisions are based on cost

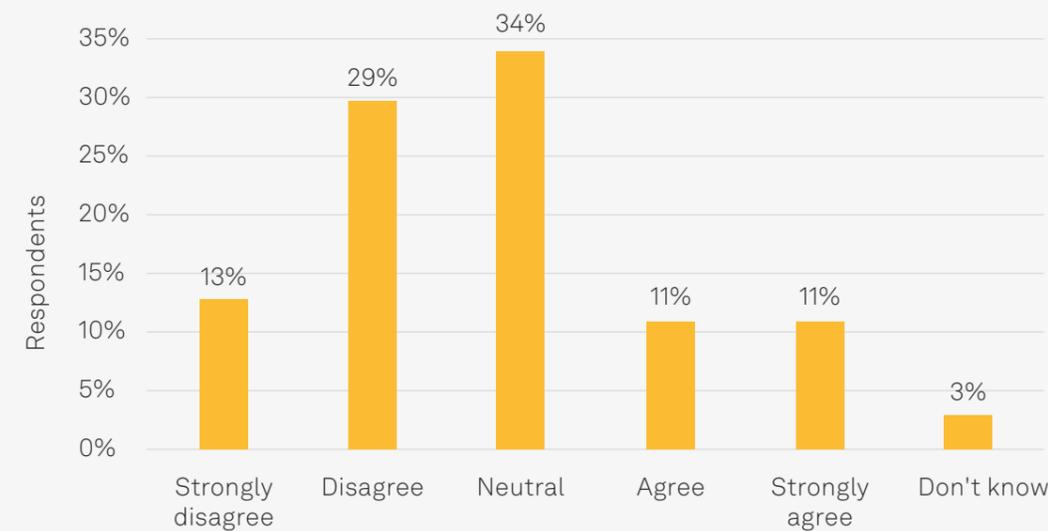


Source: Ortus/IPEC Survey 2023/24

The consultation interviews confirmed that this finding provides further insight into the drivers of procurement decisions and opportunities that IPEC can consider in terms of future support provision. With half of respondents believing that procurement decisions are based on cost, leveraging the opportunity to achieve cost savings (alongside best value etc) is likely to gain significant traction within public sector organisations. It is also clear that there is a resource efficiency imperative within these organisations. Examples of how public bodies have achieved more with less through Innovation Procurement are therefore likely to be of significant interest and value.

Survey respondents tended not to express a preference for building an innovative solution in-house rather than going to the market, as shown in Figure 11. It shows that 22% agreed or strongly agreed that they preferred to innovate in-house, while 42% disagreed or strongly disagreed and 34% were neutral.

Figure 11: I would prefer to build an innovative solution in-house than go to the market pricing structures



Source: Ortus/IPEC Survey 2023/24

Consultees suggested that those seeking to stimulate innovation through the market should recognise the value of small grants in stimulating supplier response. These provide significantly more flexibility in market-making and shaping and, where possible, should be encouraged to be a (relatively small) part of the financial resource available. Additionally, consultees suggested that supporting VCSE engagement with procurement (and vice versa) could be a very important element in achieving social value outcomes.

CONCLUSIONS

The sentiment research and analysis drive a number of key conclusions regarding the landscape for Innovation Procurement within the public sector.

Awareness and understanding of Innovation Procurement

Key conclusions in relation to awareness and understanding of Innovation Procurement are as follows:

Awareness of Innovation Procurement varies considerably and there is clearly a need to raise awareness and understanding of the topic across the wider public sector. However, in some organisations and service areas, there is greater awareness and understanding. The need here is around knowledge of the current and forthcoming regulations and how to utilise them in practice (amongst staff directly involved in the procuring of goods and services).

There is also evidence of a need to support organisations to overcome the leadership and cultural challenges that flow from Innovation Procurement adoption. A significant risk is that new regulations will be under-adopted because of cultural and leadership issues, extreme risk aversion and the security felt by sticking to historic practices. There is evidence that regulations introduced in 2015 were under-adopted for similar reasons.

The mixed terminology has the potential to be confusing (Innovation Procurement / innovation-friendly procurement / innovative procurement) and, coupled with the risk that Innovation Procurement is seen as simply about 'better procurement', there is an ongoing need to improve understanding. Dissemination of use-cases and case studies are seen as powerful tools to achieve this goal.

The survey was more successful in engaging with local government than other parts of the public sector, though the profile of respondents suggests the education sector is quite engaged with the Innovation Procurement agenda, and there is evidence that suppliers are also keen to engage with the agenda.

Whilst awareness and understanding of Innovation Procurement are still building, there is a strong appetite amongst those seeking to implement the concept for support, advice and guidance. The study provides clear evidence that demand for IPEC's offer is considerable and growing.

The study indicates a range of awareness, understanding, capability and capacity issues across the public sector in relation to Innovation Procurement. These issues affecting a broad range of roles and teams within public bodies. There are a number of dimensions to this issue, including but not limited to:

- technical skills related to adopting new procurement regulations
- collaboration and cross-organisational working
- cultural change
- understanding of terminology and concepts
- developing top-down leadership and drivers of Innovation Procurement
- practical know-how regarding how new regulations and procedures can be implemented
- supply-side understanding of how to respond to new procurement opportunities and procedures

CURRENT PRACTICE AROUND INNOVATION PROCUREMENT

Key conclusions in relation to current Innovation Procurement adoption and practice are as follows:

Few survey respondents had yet embedded Innovation Procurement into their culture and practices. Just 4% considered that they had already embedded Innovation Procurement into their organisation's practices, whilst 27% were just learning about the concept, and 21% were exploring the concept and planning how to change their culture and practices to accommodate Innovation Procurement. A further 27% were not exploring or adopting the concept at present.

The most common benefits of Innovation Procurement experienced by survey respondents include improved relationships with suppliers, stimulating internal or external innovation, achieving better value for money and motivating staff.

Risk aversion, current procurement rules and practices, cultural norms and limited budgets are the main challenges to procuring innovation. 'Bandwidth' for investment in new practices is currently limited, so demonstrating how Innovation Procurement can deliver efficiencies directly is an important element of encouraging adoption.

That said, a limited understanding of the concept is the biggest barrier to implementing Innovation Procurement. This suggests that continuing to widen understanding across the public sector is a crucial and long-term need that IPEC is well placed to address. This evidence further demonstrates the need for training, development and upskilling across the public sector.

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