

Delivering value in the age of AI and uncertainty

Amplifying human capability
in procurement



Procurement in transition

Procurement is tasked with delivering more value in an age of AI and disruption

Procurement sits at a crossroads where rapid technological advancement and economic uncertainty are reshaping expectations. Teams must deliver more value while adapting to new ways of working, transforming through AI and operating model change, and defending against risk.

The 2026 Infosys Portland Procurement Value Survey highlights the pressures redefining procurement's role. Nearly 90% of teams report rising expectations, yet only 31% achieve what their organisations consider a critical financial contribution. Over half are asked to expand impact without matching investments.

Success increasingly requires not only **achieving** financial results but **amplifying** traditional ways of working through technology

and AI, **adapting** operating models to shifting priorities, and **activating** competitive advantage through resilience during volatility.

Leading teams are pulling ahead. To focus on value, they free capacity through AI and technology, collaborate closely with stakeholders, and embed transformation into business-as-usual. These teams are better placed to seize opportunities created by disruption while maintaining resilience.

Looking ahead, procurement's next frontier lies in amplifying human capability through technology and smarter operating models. The organisations that achieve lasting impact will be those that design systems where people and technology reinforce one another, turning insight into action and ambition into measurable value.

Four areas shaping procurement's future

The core themes guiding how teams deliver value in an age of AI and disruption



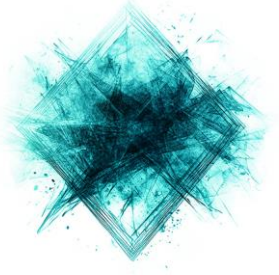
Achieve more with less

Procurement is under pressure to increase value while investment levels stay flat or shrink



Adapt op models

Embedding smarter structures that flex with changing priorities to accelerate impact and sustain performance



Amplify with AI

AI is reshaping and creating opportunities for how teams work and compete



Activate advantage

Managing risk moves from protection to driving resilience and competitive advantage

What's changed this year?

From 'more and more with less' to resilient and AI-powered, the agenda has widened

Resilience and AI join value and efficiency at the centre of procurement's agenda.

Last year we saw procurement needed to deliver more with less. This year we see permanent 'expectation inflation' without 'budget inflation'. Uncertainty has grown, with constant disruption the norm. AI emphasis has shifted from exploration to meaningful deployment. The challenge is no longer just stretching investments further but also integrating resilience and new technologies into value delivery.

Value expectations keep rising

Expectations have risen again this year, especially in risk management and decision support, even as investments remain stretched. Expectation growth reflects procurement's mandate to achieve a broader range of value.

AI investment moves centre stage

In 2025, teams were observing and cautiously experimenting with AI, with only a few taking active steps. This year, large-scale investment is accelerating, though most not yet fully embedded.

Operating models built for adaptability

Procurement operating models are shifting from efficiency-first to prioritising resilience and adaptability. Teams need the capabilities to respond quickly to disruption and to embed AI without losing momentum. The lesson learned? AI is not replacing people but amplifying their impact.

Uncertainty becomes the baseline

Last year, uncertainty was viewed as episodic; now it's constant. Teams can no longer plan around stability but must embed resiliency and adaptability into operating models.

Looking Forward

We expect procurement's challenges to become more demanding over the next few years. Embedding AI creates new opportunities for value delivery and efficiency, but also new challenges in management and ethics. Thriving under external uncertainty means continually adapting by combining technology with high performing teams to create organisational adaptability that achieves value in an environment where change is constant.



Value bar keeps rising

Procurement expected to deliver broader outcomes beyond cost savings



AI moves mainstream

From cautious pilots to scaled adoption, investments accelerate despite shifting technologies



Adaptive models matter

Operating models that flex with disruption sustain value long-term



Risk as the new normal

Constant disruption makes resilience and adaptability core procurement capabilities

Top ten recommendations

As organisations expect more with less, procurement teams must move from ambition to embedded execution, integrating technology and AI, operating models and human capabilities, and the ability to adapt to constant disruptions

Achieve more with less

01

Close the ambition– execution gap

Ambition outpaces performance. Set 12-24 month plan to translate ambition into measurable impact.

02

Achieve value everywhere

Broaden procurement's value beyond savings. Ensure consistent contribution across dimensions.

Amplify with AI

03

Drive maturity to make tech pay-off

Improve tech ROI by focusing on people and process. Codify tech into streamlined BAU.

04

Go from AI pilots to platforms

Move from small pilots to enterprise-wide AI adoption. Scale proven use cases.

05

AI hype is high; start with tangible AI returns

Prioritise investments in high-impact, measurable use cases. Deliver more value faster and don't wait for perfect.

Adapt op models

06

Engineer models, don't just buy tools

Maturity develops over time. Build capability block by block instead of in a big bang.

07

Invest in people as the core

High performing teams are core. Combine people with technology to free capacity and amplify value.

08

Embed transformation, don't just launch it

Embed op model change into BAU. Hardwire new ways of working into everyday processes.

09

Disruption hits everyone

Treat disruption as expected. Build resilience to shift from reactive recovery to proactive readiness.

10

Create opportunity through risk management

Redefine risk management as engine for value creation. Create an op model with capability for faster pivots.

Activate advantage

What this means for you: the price of standing still

Teams that invest in modern tech paired with high capabilities deliver value at higher levels and broader ranges, turning investment into sustainable advantage and enterprise adaptability

The data tells a simple story. Where teams have invested in both technology and capability, value shows up everywhere.

Organisations that invest in modern technology with high capability teams are up to 8x more likely to report critical contribution across a broad range of value. The consequences are material: Leaders report both more value AND a broader set of value delivered from procurement than Followers.

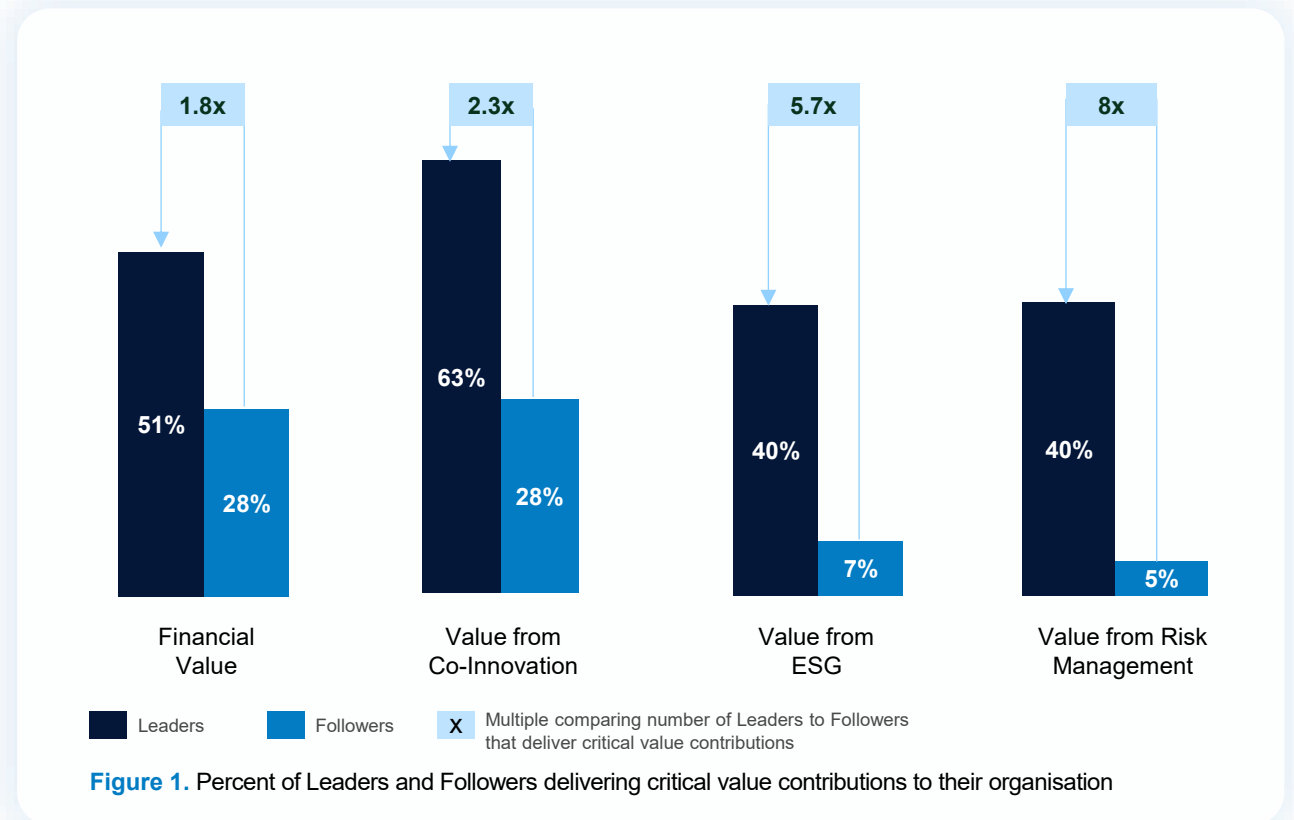
There is a cost to inaction. Followers concentrating on tools without team capability, or capability without modern tools, see narrower wins. The gaps compound: slower and smaller savings; fewer growth-enabling innovations; elevated ESG and supply

risk; and, most importantly, reduced credibility with the business to improve in the future. In volatile markets, credibility is currency. Without it, procurement is invited late, funds are rationed, and the cycle reinforces itself.

Implications for You: Use Tech to Amplify Capability

Focus on an integrated agenda, not silver bullet, siloed solutions. Prioritise investment in three areas:

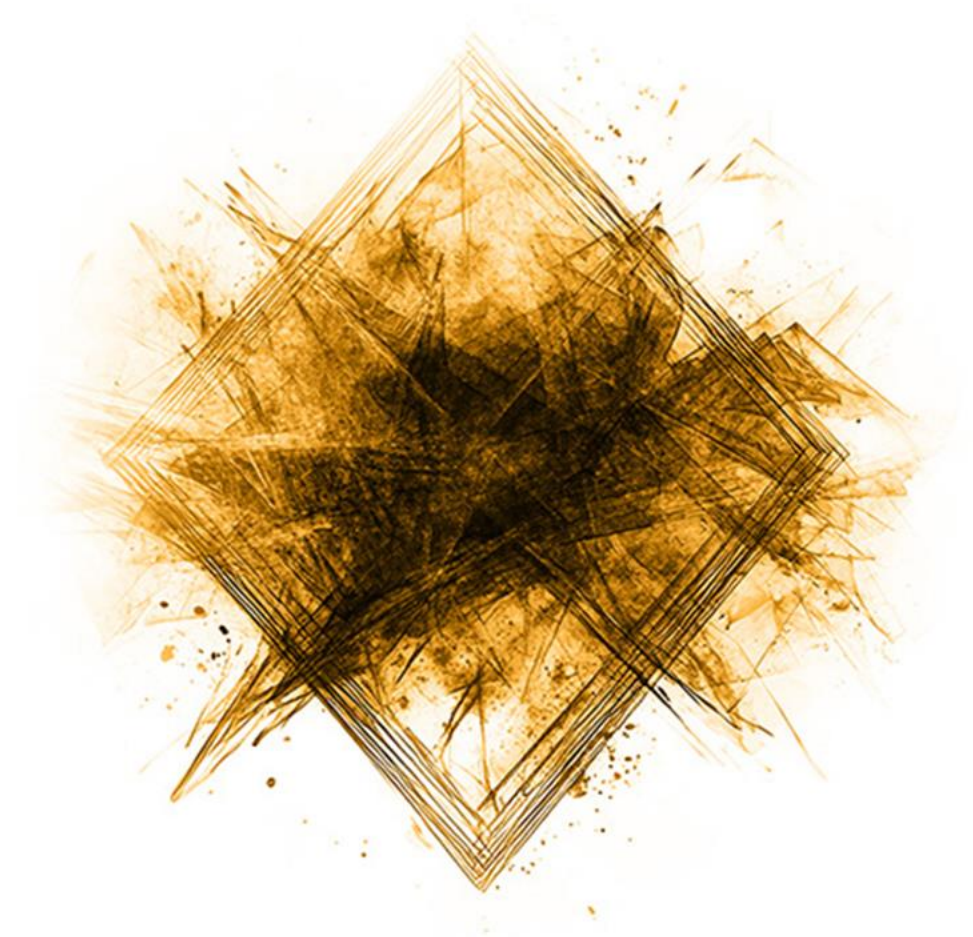
- Free team capacity and amplify capabilities and value output with modern technology and AI
- Strengthen team skills and improve alignment with enterprise priorities
- Recast risk management as a performance lever rather than a compliance requirement



Theme A

Achieve more with less

Procurement is under pressure to increase value while investment levels stay flat or shrink



Achieve more with less

Expectations are expanding; many teams must achieve broader value without additional resourcing, using AI and operating-model shifts to amplify capability

Procurement faces a dual mandate: increase operating efficiency while also expanding value delivery into ESG, resilience, risk, and innovation.

The survey shows this pressure has intensified. Nearly all teams are expected to achieve more, but only a third of teams enjoy additional resourcing investments. This forces procurement to rethink how value is achieved. Leaders who manage to meet efficiency expectations while broadening value delivery into new domains are setting the standard for procurement's future role.

Theme Highlights

- **Nearly all teams, 86%**, faces a mandate to achieve more value
- Over a **third of teams** have benefited from increased investments and in turn have increased value delivery expectations in place
- Over **half of teams** are expected to achieve more value without increased levels of investment
- More investment is not a prerequisite for greater value deliver, but teams with higher investment levels are **1.8x more likely to provide high financial value** than low financial value
- Leaders outperform, **achieving an ROI 3.3 points higher** than Followers

01 Competing pressures, expanding priorities

Procurement is expected to expand value productivity (saving + efficiency) while broadening its focus to resilience, ESG and supporting business speed and agility

Procurement teams are pulled in two directions; driving cost savings and achieving a broader set of value.

Teams' top priorities are savings (80%) and "more for less" (83%). The enduring pressures to reduce costs and improve efficiency shine through, even with continued inflationary pressure and investment constraints.

But cost is not the sole focus. The next tier of priorities demonstrate expectation broadening. These highlight procurement's role as a stabiliser in times of uncertainty and as a driver of long-term business value.

Resiliency helps reduce exposure to dynamic and uncertain cost shocks, reducing the impact of randomness, increasing cost predictability and planning control.

Adaptability is an important forward-looking priority. Adaptability is the capability to anticipate and quickly respond to large disruptions or shifting priorities, maintaining operational

stability while finding new ways to achieve value and competitive advantage. With macro uncertainty continuing to reshape markets, adaptability is becoming a decisive source of future advantage.

Implications for You: *Broaden the Value Agenda*

Ensure teams expand beyond cost savings into areas such as resiliency, ESG and innovation to meet rising expectations and protect enterprise value. Organisations that embed this broader mandate will be better prepared for disruption and more attractive to investors and stakeholders.

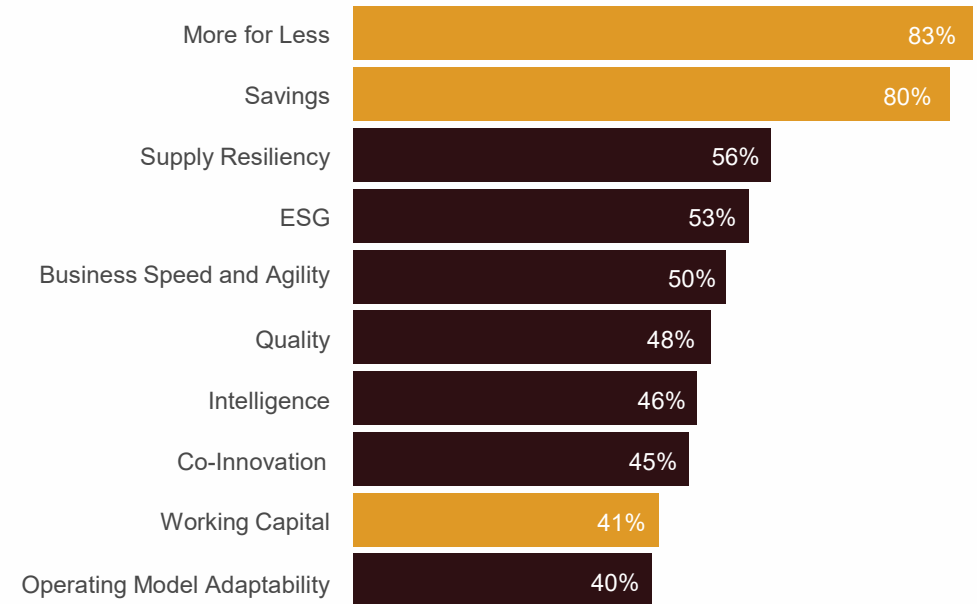


Figure 2. Top focus areas, next 1-2 years

■ Savings focused value delivery ■ Broadening range of value delivery

Rising expectations

Widening ambition – execution gap between teams aiming for high financial impact and current delivery

The survey highlights a growing ambition – execution gap.

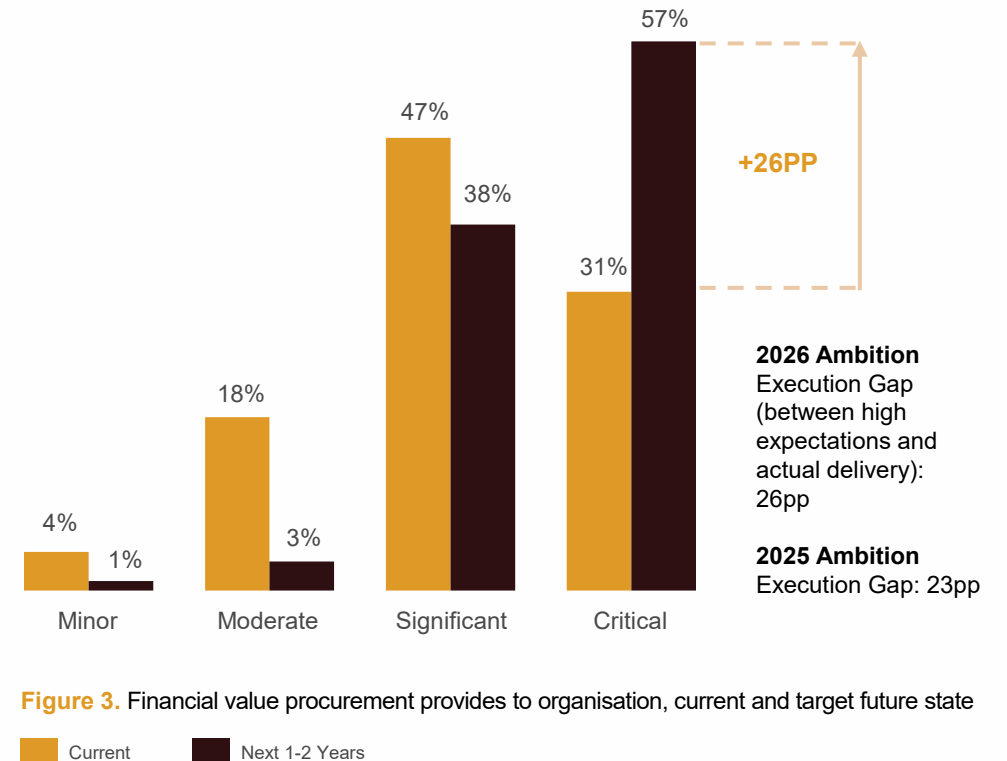
In the 2026 survey almost a quarter of respondents are delivering lower financial performance. This is a slip from last year's survey, with 17% reporting lower performance; an increase of 5pp reporting lower performance over the last year.

Looking ahead, expectations are accelerating. 57% of teams aim to achieve a critical level of financial impact in near term, nearly doubling current delivery and rising from the 53% reported last year. This increase signals a growing pressure to achieve value, creating an opportunity and a burning platform for action now.

Organisations are demanding more, but procurement's ability to deliver is not fully keeping pace with expectations. The challenge is not simply about achieving cost savings but about building the capacity and credibility to sustain a higher, more strategic level of contribution over time.

Implications for You: *Close the Ambition – Execution Gap*

Ensure teams expand beyond cost savings into areas such as resiliency, ESG and innovation to meet rising expectations and protect enterprise value. Organisations that embed this broader mandate will be better prepared for disruption and more attractive to investors and stakeholders.



More and more with less: the new normal

Nearly 90% of teams expected to achieve more value with over half asked to deliver more and more with less

The pressure on procurement to achieve more with less has become a defining feature.

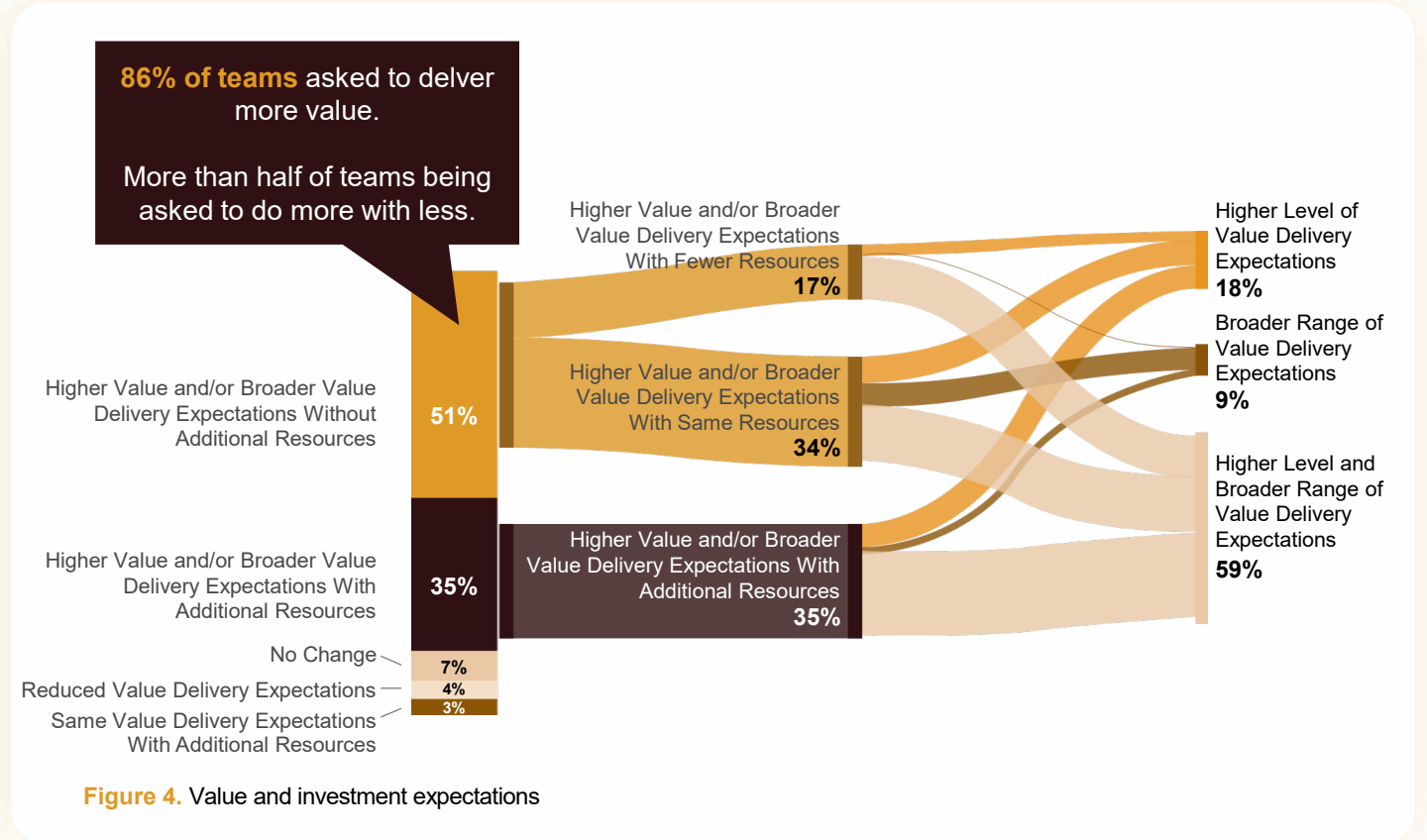
86% of teams are asked to deliver more value, with over half not given matching investment growth. This demand includes improved cost savings and a broader range of value delivery.

Add in disruption and shifting demands, more with less creates a structural challenge for most teams. This is addressed by embracing technology, AI and smarter operating models freeing capacity for higher-value work.

35% of teams enjoy increased investment levels, yielding strong returns. Teams with additional resources are 1.8x as likely to provide a high financial impact as opposed to a low impact outcome. This signals a recognition that procurement's role is expanding and worth backing. Rather than a cost to be contained, procurement is an area where additional investment can pay off.

Implications for You: *Turn Pressure Into Advantage*

Procurement is one of the few functions capable of self-funding its own transformation. By reinvesting a portion of realised savings and value gains, teams can accelerate automation, data modernisation and upskilling without waiting for additional budget. Those who reframe constraints as catalysts for change and improvement gain efficiency and credibility as enterprise value creators, not just cost managers.



02 The heart of a champion

Leaders have an edge in holistic performance across 6-key characteristics

Procurement is leveling up, but not evenly.

Procurement is evolving from being "corporate police" focused on compliance and pricing to a strategic function that enables business success.

Initially, procurement teams were mainly involved in transactional operations like purchasing and payments. Leaders have reenvisioned their focus and are using technology, AI and advanced operating models to shift from transactional management to strategic value delivery.

Despite a disruptive macro-environment, Leaders outperform across all 6-key characteristics. They

achieve value through a holistic approach, rather than a single transformative action. Followers remain constrained by legacy structures, technologies and ways of working that limit their scale and impact.

Implications for You:
Build Holistic Capabilities

Improving performance requires sustained investment in people, operating models, and technology, not one-off initiatives. Align strategic goals with daily delivery, measure outcomes rigorously, and adapt continuously to create lasting competitive advantage.

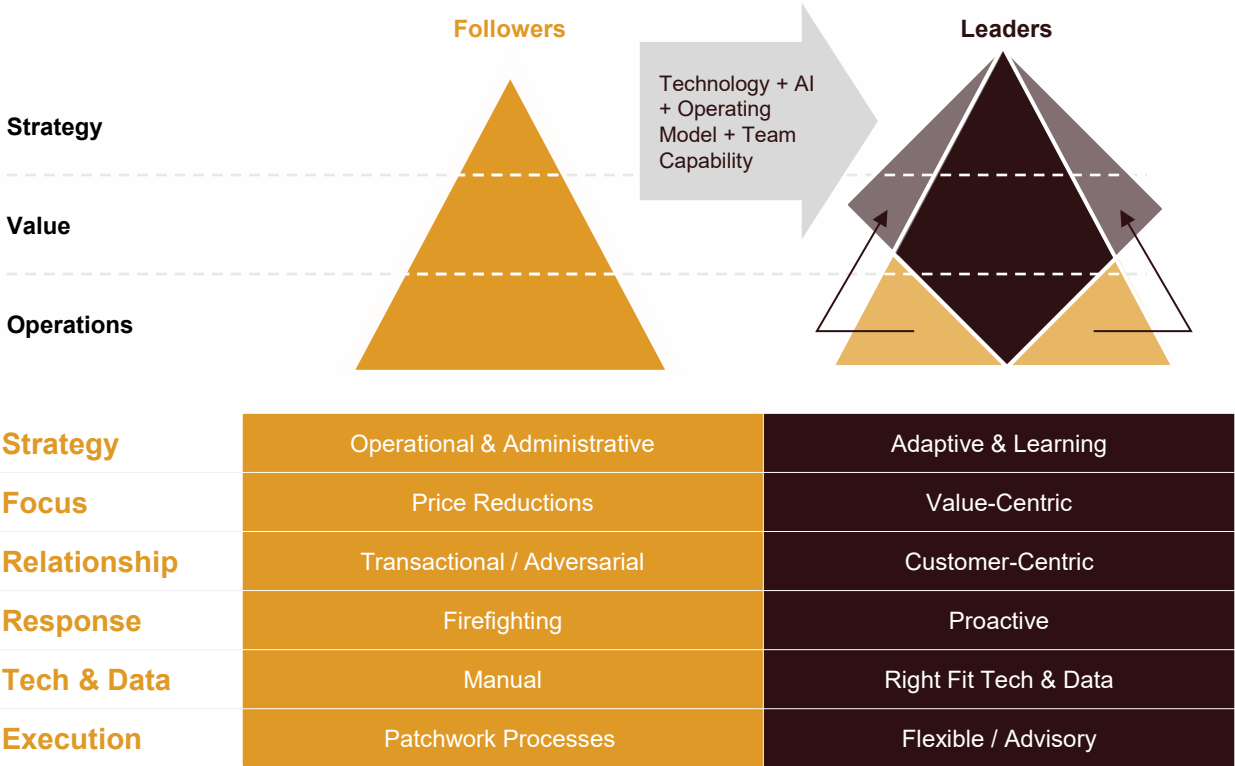


Figure 5. 6-key strategic characteristics of procurement teams, Leaders and Followers

Leadership value advantage

Leaders outperform Followers across multiple metrics of value creation

Leaders build and sustain a value flywheel.

Leaders outperform across a broad range of value delivery. These improvements reflect more than operational efficiency. They show how connected strategy, technology, and capability combine to produce sustained enterprise value.

This flywheel effect strengthens with each cycle. High performance builds credibility; credibility earns trust; trust unlocks further investment. As Leaders reinvest these gains, they broaden procurement's role into resilience, ESG and innovation, turning early wins into long-term competitive advantage.

This credibility strengthens procurement's case for greater investment. Stakeholders are more

willing to back functions that demonstrate tangible impact and partnership, allowing Leaders to secure investment that fuels even broader transformation. By contrast, teams that remain narrowly focused on savings alone risk being sidelined when decisions on enterprise priorities are made.

Implications for You: ***Build the Value Flywheel***

Sustain high value delivery and stakeholder satisfaction to build credibility and unlock trust. This trust becomes the gateway to expand procurement's role, secure greater investment, and accelerate impact across a broader set of value domains. Momentum comes from sustained value delivery, where every success fuels the next.

Savings and Efficiency	↑ 2.3x	More value delivered per FTE <i>\$M/FTE</i>
Strategic Speed	↓ 7%	Reduction in S2C times <i>reduction in average weeks from sourcing to contract</i>
Operational Speed	↓ 50-83%	Reduction in P2P times <i>reduction in average hours from PR to PO</i>
Effort	↓ 60-80%	Less manual purchasing and negotiation effort across functions <i>reduction in average time spent by procurement and end users</i>
Satisfaction	↑ +4	Increased customer satisfaction <i>customer satisfaction out of 10</i>
ROI	↑ +3.3x	Higher ROI return <i>procurement function ROI</i>

Figure 6. Increased value provided by Leaders compared to Followers

02 Achieve more with less - Achieve value everywhere

Capturing hidden value

Rethinking a service model closed revenue leakage, strengthened control and turned a drain into a driver of growth



Closing revenue leakage

Detailed make-vs-buy analysis uncovered hidden drains and reclaimed lost value



Strengthening control

Internalising services improved visibility and reduced dependency



Driving growth from waste

Reframed procurement created lasting top-line impact without additional investment

A national care-related service provider restructured its procurement approach, replacing its central function and embarking on a programme designed to transform value delivery.

The shift was prompted by ongoing pressures to achieve stronger outcomes while operating within tighter investment constraints.

The programme exceeded all financial targets across over more than 40 projects undertaken, but the most significant achievement came from addressing hidden value leakage. A detailed analysis revealed “mission critical” outsourced services were consistently failing to deliver on revenue potential. By consolidating, the organisation took back control of supply, closed the revenue leakage, and created a direct impact to top-line results with an

increase of over 14% to profitability.

This transition reshaped the operating model beyond immediate financial impact. Internalising control of the service, coupled with renewed, more robust supplier arrangements, created opportunities to leverage scale, improve visibility across the supply chain and enable greater consistency of product. Procurement also demonstrated how smarter use of existing investments can create new streams of value without requiring additional headcount or budget. Overall, the new procurement approached delivered benefits with a 5.3x ROI.

The outcome highlights procurement’s evolving role in creating value. By rethinking traditional structures and taking on responsibilities once assumed to sit outside its scope, procurement achieved results that influenced both cost efficiency and revenue growth.

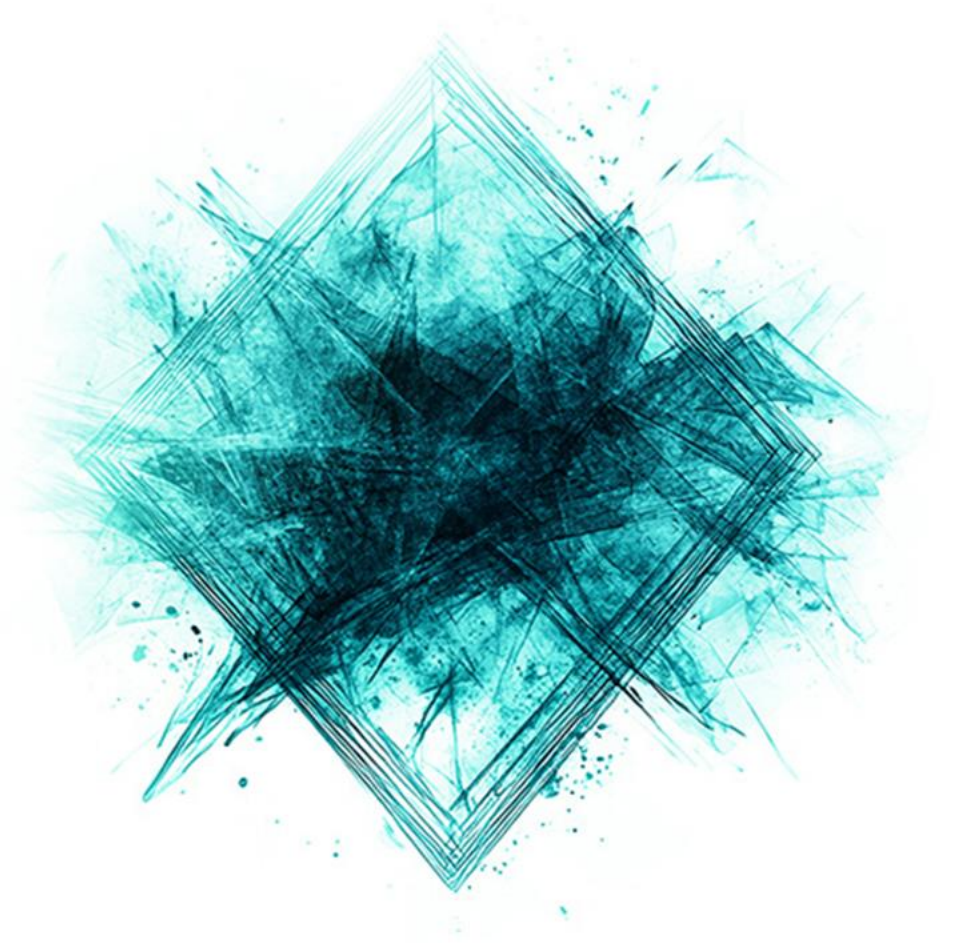
“We didn’t just cut costs. By rethinking how we supported this service, procurement turned a recurring drain into a source of revenue growth. It showed our leadership team that procurement can create real business advantage when it challenges old assumptions”

CPO, national care-related service provider

Theme B

Amplify with AI

AI is reshaping and creating opportunities
for how teams work and compete



Amplify with AI

AI is reshaping and creating opportunities for how teams work and compete

AI has moved from the sidelines to the centre of procurement's agenda.

Last year, we saw in our 2025 report that most teams were still observing and cautiously experimenting, with only a few pilots in place. This year, investment in AI has accelerated sharply, with many organisations actively deploying and scaling new solutions. The shift is not only about technology adoption, but about how work gets done, with AI augmenting processes, changing decision-making, and expanding the scope of procurement's role. Leaders are pulling ahead by embedding AI into their operations to unlock speed, efficiency, and innovation, while Followers remain at earlier stages of experimentation, still uncertain how to proceed.

Theme Highlights

- **Over half of teams** report increasing AI investment levels, but a third still have no AI experience
- Leaders are almost **twice as likely as Followers to be scaling AI solutions** across sourcing, data analytics, and supplier management
- **86% of respondents** say AI is expected to be a top driver of procurement efficiency and impact within the next two years
- Teams experimenting with AI cite **early gains in automation of routine tasks**, faster cycle-times, and improved decision insights

03 Leaders gain more from their tech

Leaders report higher satisfaction across every type of technologies, with a wider gap for mature tech

Technology satisfaction exposes a sharp divide.

Most Leaders report being at least moderately satisfied with their technology, while Followers feel the opposite. This gap underscores the maturity advantage held by Leaders.

For Leaders, mature systems deliver higher satisfaction than less proven tools. Inflated expectations clash with the reality of immature adoption and uneven integration. For these systems, satisfaction improves with experience.

Leader satisfaction is driven by building on a stronger foundation enabling more seamless operations. Strong data integrity, clear process design, and policies embedded within systems means technology operates within a reliable, ready-to-use context. Followers contend with fragmented data, manual workflows, and poor integration, leading to frustration and underperformance.

For emerging technologies, especially AI, satisfaction lags due to limited model training, fragmented pilot use cases, and overreliance on generic Gen-AI applications that offer limited process efficiency. AI use cases assist users in segments of the workflow rather than end-to-end automation, requiring human intervention to connect the dots.

Implications for You: Keep Maturing the Tools

Keep maturing and integrating technology with people and process, even when results seem slow. Technology satisfaction isn't instant; Leaders earn it by maturing tools over time. Skip this and technology investment 'sits on the shelf'.

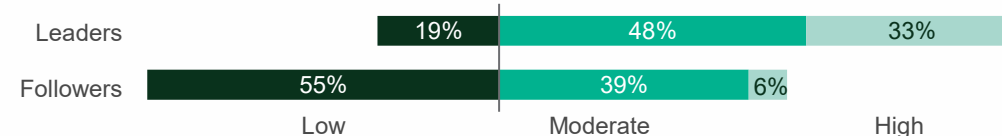


Figure 7. Technology satisfaction - overall

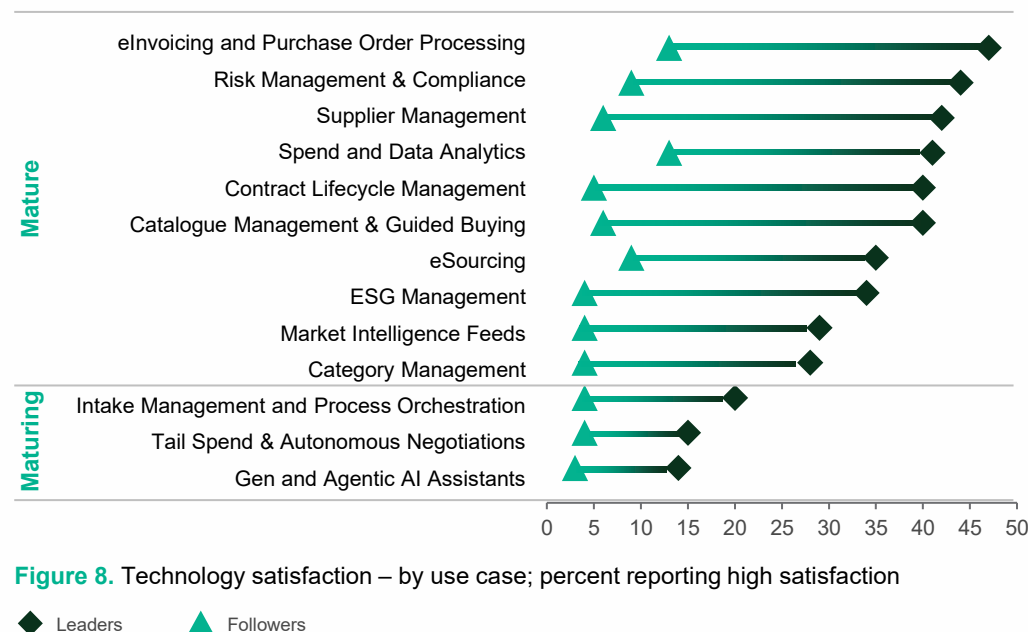


Figure 8. Technology satisfaction – by use case; percent reporting high satisfaction

Human factors drive tech success

Leaders report fewer issues not because their tech is flawless, but because they invest in the 'soft' side of tech

The differentiator is not the technology, but the people.

Leaders and Followers both face technical challenges with procurement technology at similar rates. The difference is people and process issues, where the gap between Leaders and Followers is around 10%. Leaders start earlier and maintain investment in the 'softer' side of technology adoption. They redesign processes, align solutions to business requirements, and begin the change journey at the design stage, not after. Change management builds on a system already shaped to fit workflows, not forced to fit later. Leaders report fewer issues not because their tools are perfect, but because they've managed the human side better.

This points to a critical lesson: technology is not a silver bullet. Success comes from pairing digital investments with a strong 'people

mindset'. To harness the benefits of technology, appropriately design the processes, data connectivity, policies and governance and THEN encode these within technology. Poor design upfront means that humans in the loop will need to deal with the repercussions of limited automation or inaccurate insights.

Implications for You: *Focus on the Foundations*

To reduce risk of failed adoption, start with design. Leaders invest time and resources in the unglamorous work: embedding change into solution design from the outset, aligning workflows and business needs. This approach creates smoother adoption, higher satisfaction, and stronger ROI because the system is already tailored to how the business works and evolves.

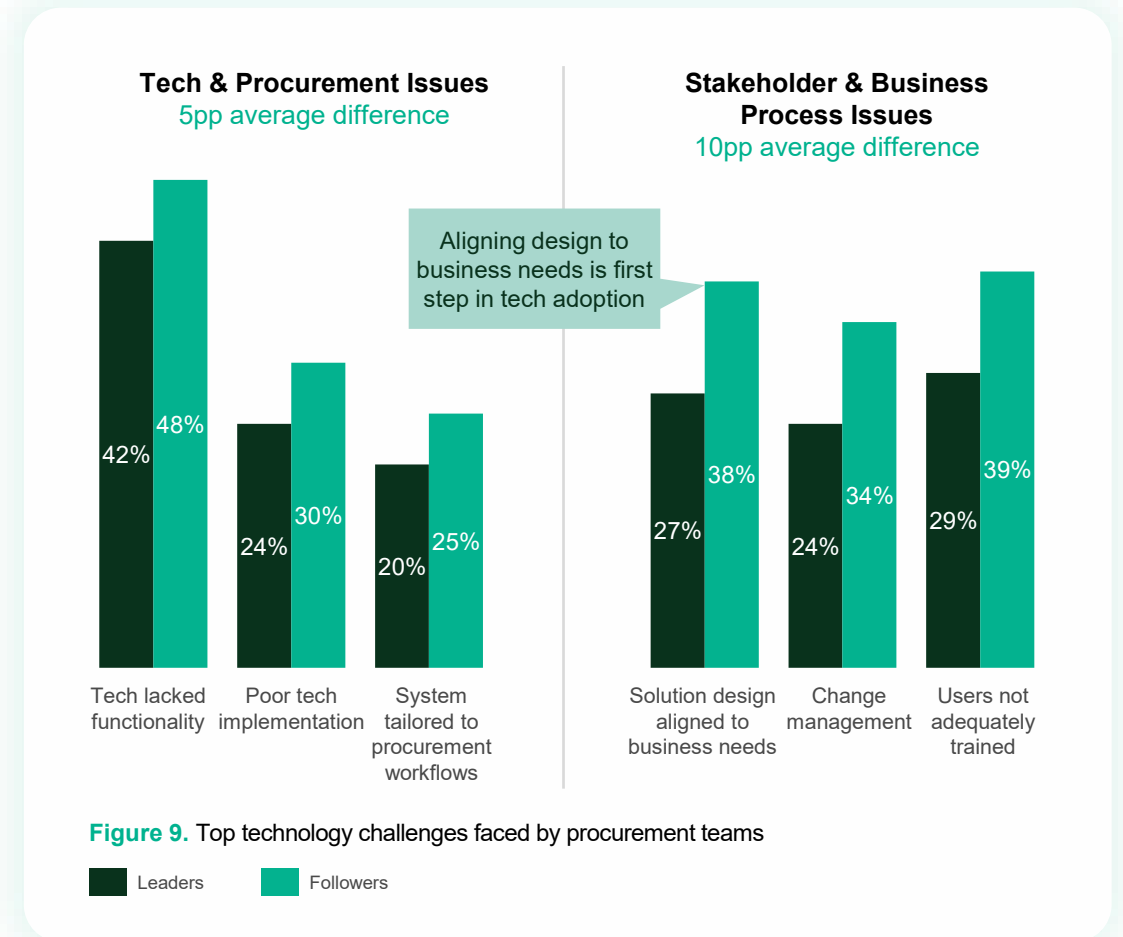


Figure 9. Top technology challenges faced by procurement teams

Leaders Followers

Tech delivers most when paired with strong teams

High capability teams utilising modern tools achieve outsized impact across holistic set of measures

Is the heavy investment in procurement technology worth it? 'Yes', when technology is paired with strong team capability.

High-performing teams with modern tools outpace others across a broad range of value. But technology alone is not a silver bullet. Teams with strong skills but weaker tools still outperform those with emerging capabilities and less mature technology, underscoring that people and process remain the critical core to value delivery.

The evidence clearly is that technology acts as a powerful force multiplier. Strong teams become great teams with the right technology in place, amplifying their ability to achieve results. But this is not instant: early investments often yield incremental benefits that expand over time as capability matures, reinforcing why technology is inseparable from capability building, not a shortcut around it.

Implications for You: *Pair Technology with Team Strength*

Procurement technology performs best when implemented alongside a steady evolution of team and process maturity. Teams that take the journey of building capabilities step by step while scaling technology unlock the full multiplier effect, consistently outperforming peers across a range of outcomes.

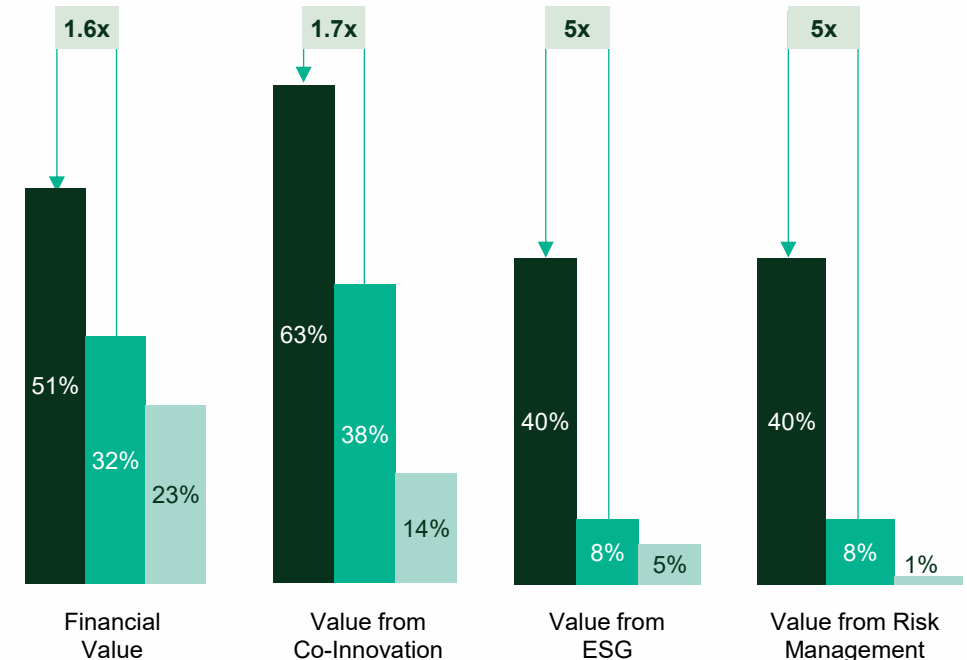


Figure 10. Percent of teams delivering critical value contributions to their organisation, as impacted by technology and team capabilities

■ High capability team + good performing tech
■ High capability team + low performing tech
■ Low capability team + low performing tech
X Multiple comparing high performing teams with and without good tech

03 Amplify with AI - Drive maturity to make tech pay-off

When tech meets talent

The right tools paired with skilled teams turned investment into measurable impact



Adoption by Design

Co-created workflows and training sustained high, enterprise-wide platform usage rates



Data as Product

Enterprise-wide standard metadata and stewardship made insights reliable, comparable and actionable



Governed Execution

Clear ownership, cadence and KPIs turned pilots into scaled outcomes

A large regional government municipality was expected to expand procurement's contribution without additional headcount or annual budget.

The legacy source-to-pay stack was underused, data was fragmented, and cycle-times dragged, feeding shadow spend and stakeholder frustration. Leadership chose to modernise the platform and deliberately pair the upgrade with a people-first operating model.

Two tracks ran in parallel. For technology, the team refreshed sourcing and CLM, introduced guided intake and orchestration, and stood up spend and risk analytics, with AI embedded where it clearly accelerated work. For people, they redesigned roles, co-created workflows with end users, and built an “adoption factory” for change management.

Data foundations moved first. Master and metadata standards were cleaned and enforced, category playbooks were rebuilt, and supplier records were governed. With reliable data, guided buying reduced friction, cycle-times fell, maverick spend receded, and analytics shifted from reporting to decision support.

Within the first planning cycle, procurement's “value bandwidth” widened: more categories under management, faster execution with fewer escalations, and visibly higher satisfaction from stakeholders. The platform mattered, but the performance lift came from how people used it; roles with clear ownership, data that could be trusted, and a cadence that embedded change into BAU.

“

Software didn't move our numbers. It was our people. The tech gave us the boost but the way we organised and operated turned it into performance we can measure.

CFO, large regional government municipality

04 AI deployment spans a spectrum of maturity

Teams exploring a variety of AI strategies, but few aiming for an AI revolution

AI adoption is unfolding in stages of maturity.

Most teams start with basics, using operational enablers and assistants to take friction out of workflows. These are practical, accessible, and create early wins; the AI “training ground”.

A smaller group is advancing into workforce streamlining. This requires business process management redesign and relies on agentic AI capabilities to handle more complex tasks. These teams are not just experimenting with tools; they are reshaping work in tandem with new technology.

At the far end of the spectrum, a small but ambitious group is pursuing AI-first reinvention. This is a full rethink of procurement, asking how

procurement creates value, who performs work, and how insights translate into action. Large opportunities for competitive advantage exist here: creatively re-imagining the procurement model so that AI, human talent, and digital infrastructure are designed together as an integrated system rather than separate layers.

Implications for You: *From Intent to Impact*

Anchor your AI strategy to where your team’s maturity stands today. Clarify AI’s primary role and align funding, data and change plans to that choice. Start by locking in value from enablers and assistants, then prepare for streamlining through process redesign and stronger AI capability.

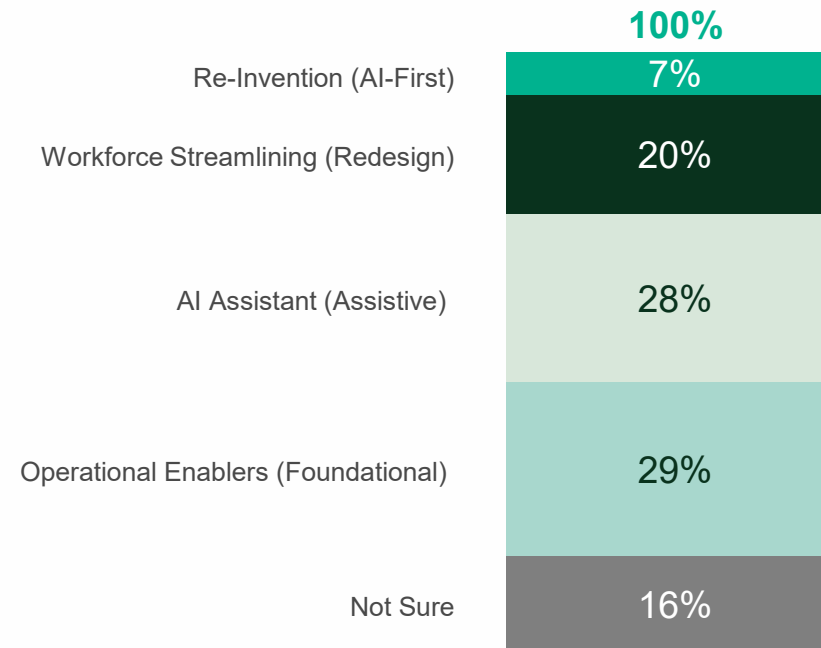


Figure 11. AI strategic use intent

Leaders doubling down on AI investment

Leaders committing to larger budget increases, positioning themselves to move faster into advanced use cases

Investment in AI is accelerating, but scale of commitment differentiates Leaders from Followers.

Half of teams plan increased AI budgets over the next two years. Leaders are planning larger increases, reflecting confidence in AI's potential and foundations built from earlier investments.

Leaders are layering new capabilities onto existing systems, enabling faster movement into advanced use cases. Followers, with smaller investments and less experience, risk lagging. The widening gap means AI is no longer a question of "if" but "how fast."

AI is not the ace up the sleeve, but the ante to play. Most teams are investing, so differentiation depends on how well AI is executed and integrated into daily work. The next leap will not come from Gen AI tools that summarise information, but from agentic AI that analyse, decide, and act within trusted guardrails.

Implications for You: Scale AI Priorities

Move fast with pilots to prove AI's value in months, not years. Accelerate investment through practical use cases to avoid stalled ambitions and create momentum, confidence, and measurable impact. Staged investment accelerates time to value and locks in structural advantage; thin, stop-and-start budgets get trapped in pilots while faster peers compound gains.

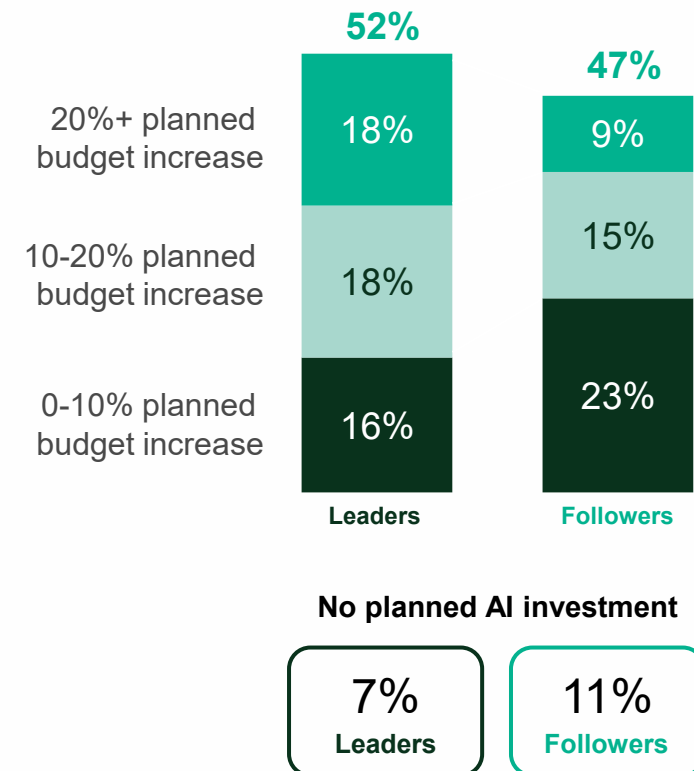


Figure 12. Percent teams planning increase in AI investment budget next 1-2 years

Different barriers for AI adoption

Followers more likely to ask 'if' AI while Leaders more likely to ask 'how' AI

Barriers to AI adoption remain but differ between Leaders and Followers.

Most teams recognise AI's potential. Followers struggle at the 'if' stage, starting with understanding the value of specific use cases, measuring ROI and securing funding.

Leaders have moved on to the "how" of scaling AI, addressing security and policy integration, and embedding AI into established operating models. This marks a critical difference: Leaders are executing, while Followers are determining where and how to begin.

ROI is a sticking point for both groups, but with a notable gap: 38% of Leaders versus 54% of Followers. This suggests Leaders have a clearer understanding of AI's potential. Closing this gap

will require better alignment with operating models and enterprise priorities, along with more active collaboration between procurement and the wider business to evaluate and educate on AI opportunities.

Implications for You: *From Doubt to Deployment*

Procurement teams must move beyond debating AI's potential to embedding it. For Followers, this means addressing specific ROI use cases and funding models. For Leaders, it requires tackling integration and security issues proactively. Engage IT, Risk and Finance to define ROI criteria, fund pilots and tackle policy, data and security integration.

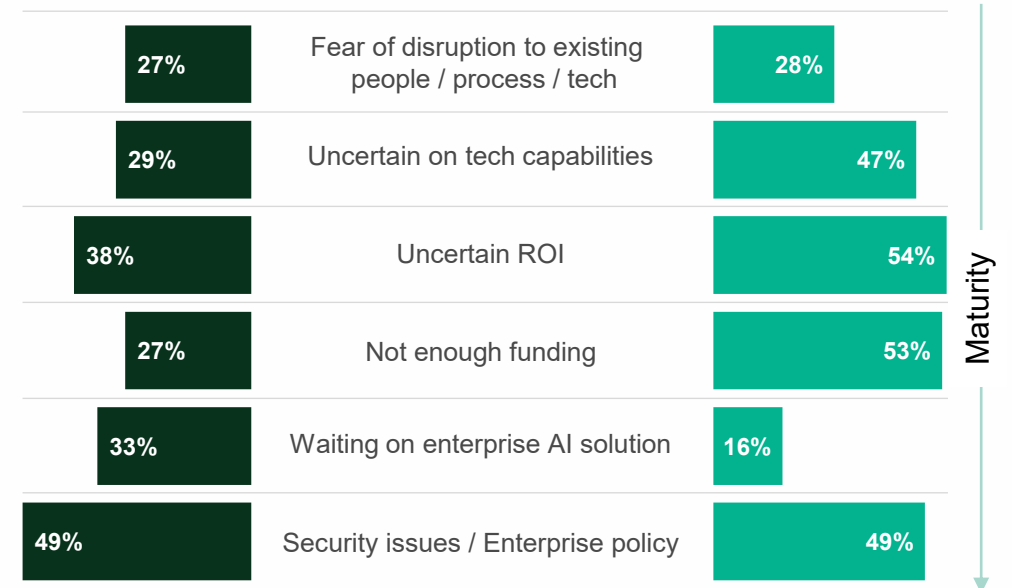


Figure 13. Top barriers for AI investment

Leaders Followers

05 AI adoption outpacing satisfaction

While not yet achieving expectations, there is an optimistic eye on the future

While AI hype is high, actual satisfaction with outcomes remains low.

Teams report that AI has not yet met expectations, revealing a gap between early promise and practical delivery. Leaders, though further ahead in deployment, show slightly less satisfaction, likely due to elevated expectations and the recognition that full benefits are yet to materialise.

Still, the outlook is positive. Most teams anticipate strong improvements in AI performance over the next two years as systems mature and integration deepens. Many view current challenges as transitional and believe ongoing investment will unlock greater impact.

Experience levels also vary markedly. Over half of Leaders already have AI in deployment, compared to fewer than half of Followers. Followers are also nearly twice as likely to have no AI experience, signalling a widening capability gap as adoption accelerates.

Implications for You: *Making AI Deliver*

Treat every AI case as a product: give it a business owner, explicit outcome KPIs, instrumentation for feedback and a standing cadence for model / interface tuning and change management. Over time, adoption turns into advantage; user satisfaction climbs, cycle-times drop and you earn the credibility and budget to scale further.

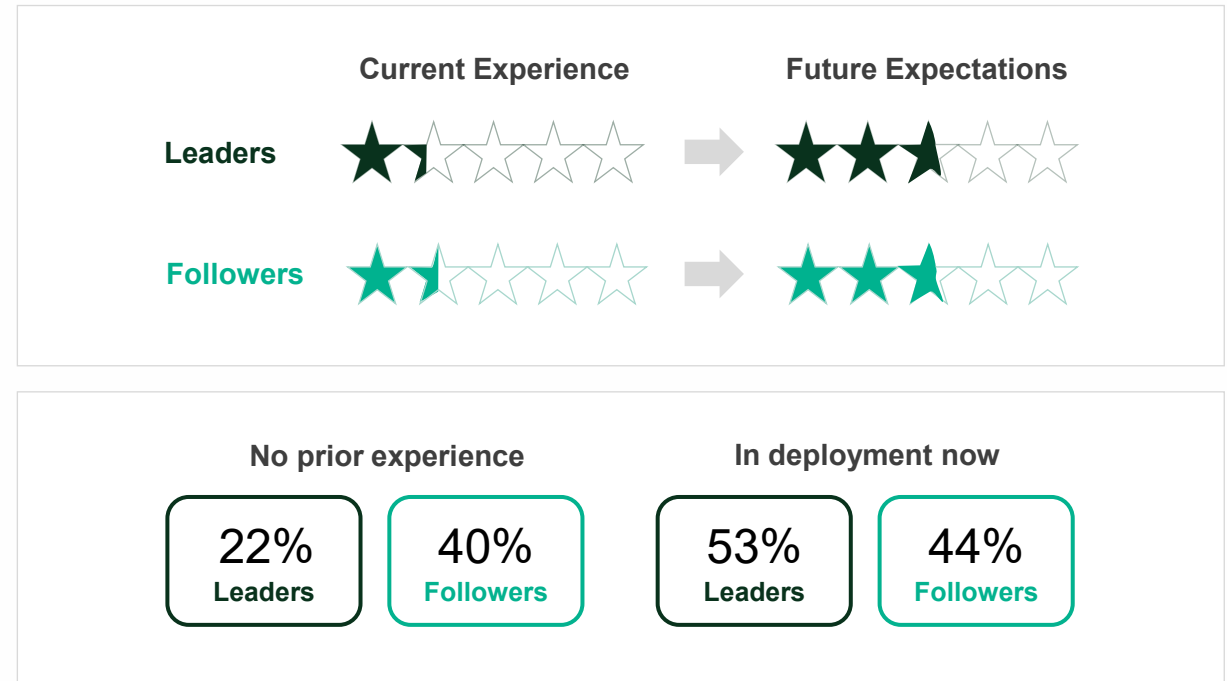


Figure 14. Current and expected experience with AI

05 Amplify with AI - AI hype is high; start with tangible AI returns

One front door, real results

Unifying intake and orchestration turned scattered effort into measurable, scalable value



One front door

Unified intake across S2P eliminated emails, duplicates, handoffs and delays



AI in the flow

AI classified requests, suggested answers, deflected tickets and checked invoices automatically



Built into BAU

Governance, SLAs, and playbooks embedded into daily operations globally

A well-known global consumer products manufacturer faced a familiar challenge. Source-to-Pay work arrived through emails, spreadsheets and local tools. Cases were duplicated and inconsistently triaged, leaving poor visibility and slow progress. Stakeholders lacked transparency, cycle-times drifted, and teams spent more time coordinating than solving.

The team treated the fix as an operating model transformation enabled by technology. Procurement formed a multi-functional team to redesign the “front door” for S2P services on an AI-enabled platform with priority processes moving onto orchestrated workflows with clear ownership. Real-time data flowed to dashboards to make performance transparent.

AI was placed “in the flow”: requests were auto-classified and routed, repetitive

tickets deflected, invoices checked in real-time, and agent workspaces suggested next best actions. Governance made the new ways of working stick, with playbooks embedded into BAU and joint multi-functional forums.

Results were seen within months. Capacity was freed from ticket deflection, removal of duplicate submissions, elimination of manual case administration, real-time reporting and automated case creation and assignment. Invoice-related queries dropped by 45% through real-time status, self-service adoption rose by 92%, and case resolution timelines improved by 51%. Stakeholders gained a reliable single source of truth and a predictable experience across regions.



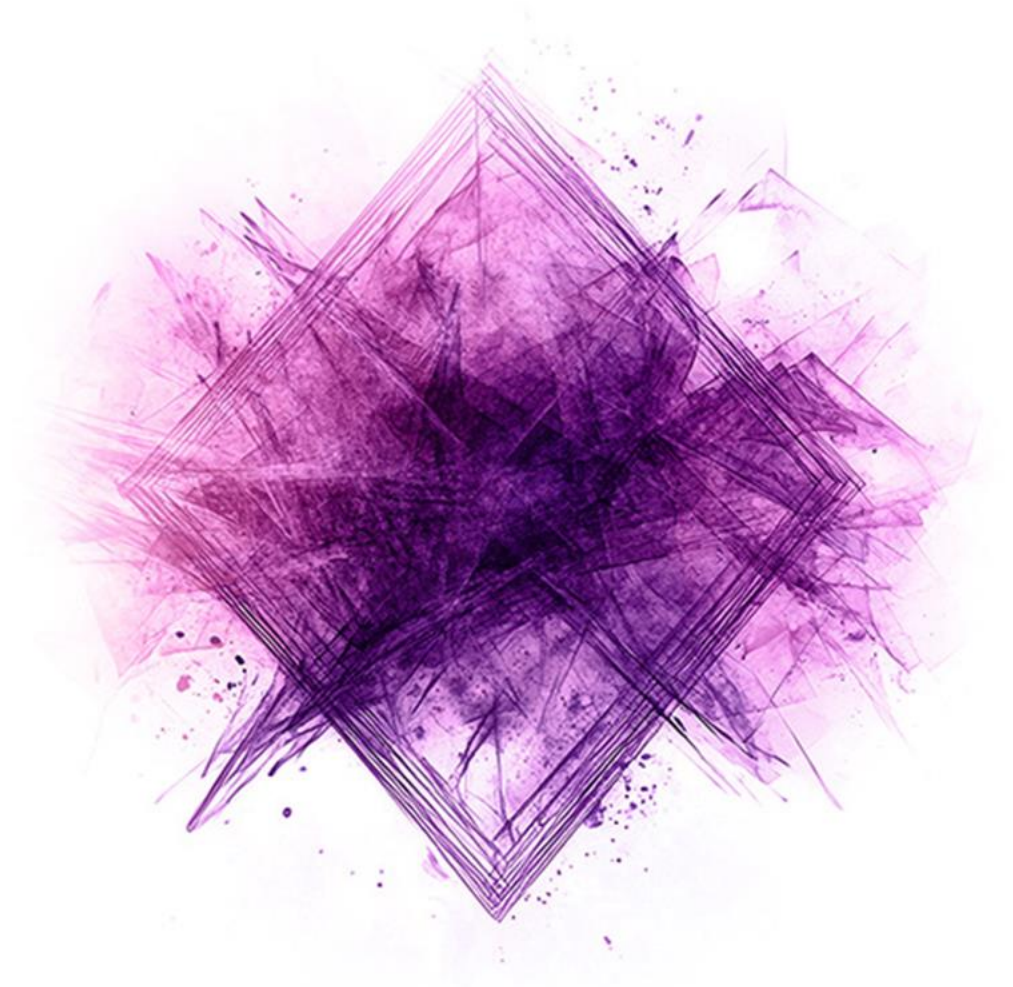
Once we stopped chasing emails and started coordinating work, everything sped up. One front door gave us transparency, faster answers, and the confidence to scale

Head of Operations, global branded manufacturer

Theme C

Adapt op models

Embed smarter structures that flex with changing priorities to accelerate impact and sustain performance



Adapt op models

Embed smarter structures that flex with changing priorities to accelerate impact and sustain performance

Survey results show a gap between Leaders and Followers in sustaining value after operating model transformation.

Leaders are nearly twice as likely to maintain value achieved after transformation, while Followers often lose ground. The difference lies in treating operating model change as a series of building blocks, each adding capability over time. This builds towards a fully integrated set of processes, technology, and ways of working, rather than as a one-off big-bang initiative. Leaders report more success in embedding adaptability, enabling them to anticipate significant changes, respond rapidly to disruption and sustain operational and value delivery as conditions evolve. Embedding adaptability into designs, by hard-wiring responsiveness into processes, structures, and mindsets, enables teams to anticipate significant

changes, respond rapidly to disruption, and sustain operational and value delivery as conditions evolve.

Theme Highlights

- **Leaders drive value** through the virtuous cycle of collaboration → alignment → value delivery → collaboration
- Risk management and data analytics **have become priorities** for most teams
- **Technology and AI investment investments are the top priorities** for teams, but upskilling teams for redesigned roles is seen as critical
- Leaders are nearly **twice as likely** to fully sustain value after transformation
- **73% of Followers** report losing at least some of the value initially achieved
- **Leaders exceed expectations** in 47% of cases, compared to 24% of Followers

06 Collaboration drives alignment and alignment drives performance

Teams aligning with their stakeholders more consistently deliver high value

Collaboration points the way to procurement performance.

89% of Leaders report high collaboration with stakeholders compared to 68% of Followers. Collaboration directly drives alignment, which is 10x more likely when collaboration is strong. Alignment ensures procurement and the wider business work toward shared goals, avoiding inefficiencies and missteps that come from misaligned strategies.

Crucially, alignment underpins both the level and dependability of value delivery. Teams with high alignment are far more likely to achieve significant or critical value; 88% versus only 45% for those with low alignment. Moreover, high-alignment teams missed expectations just 5% of the time compared to 22% for low-alignment teams, a four-fold improvement that builds trust and consistency while reducing the risk of underperformance.

Importantly, these outcomes create a virtuous cycle: dependable delivery fosters greater willingness among stakeholders to collaborate, which in turn strengthens alignment even further. Collaboration fuels alignment, alignment fuels performance, and performance fuels further collaboration, reinforcing procurement's ability to achieve critical value and meet expectations reliably.

Implications for You: *Make Alignment a Priority*

Create a single, shared value agenda with business owners; co-design KPIs, funding and roadmaps; and run quarterly alignment reviews so procurement and stakeholders pull in the same direction.

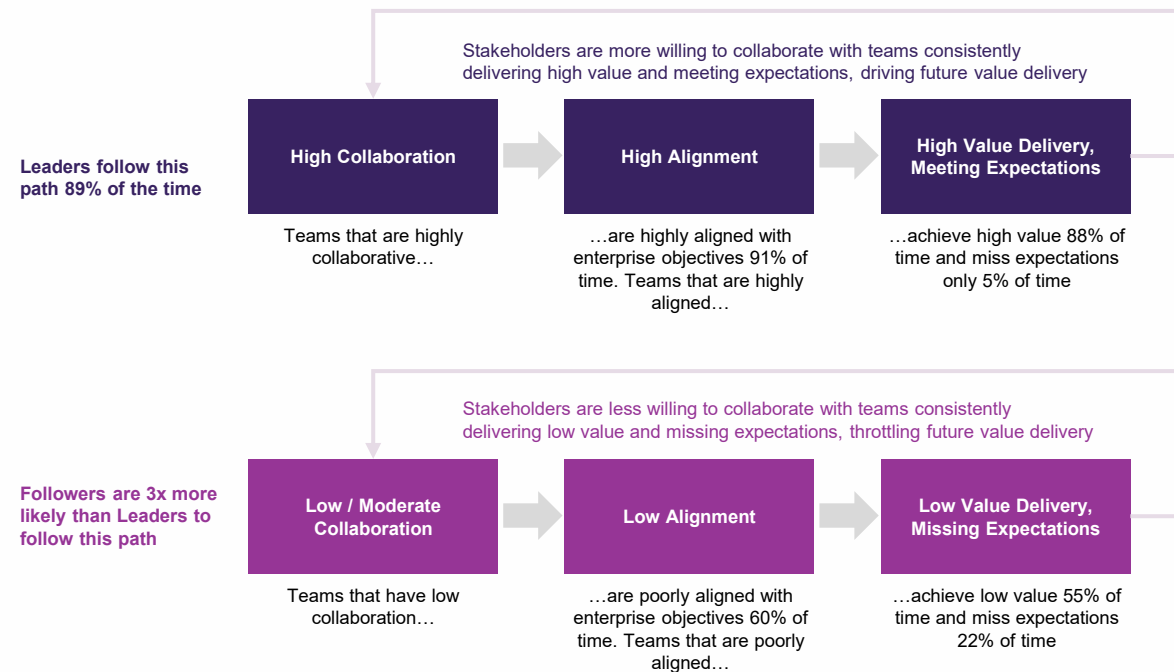


Figure 15. Collaboration, Alignment and Value Virtuous Cycle

Building blocks of value management activities

Risk and data analytics rise as core drivers of financial impact across the board

Procurement teams are changing how they manage spend.

Last year, only the highest performing teams had risk management as a top value management activity, but near the bottom of the priority list. Fast forward to this year and risk management has become a near-universal priority, with its importance sitting at #2 for teams achieving high value. This shift reflects the recognition of risk management as central to sustaining value in a high-risk environment.

Data analytics has also surged in importance. What was previously a top strategic ambition has now become an operational reality, with most teams actively using data to improve spend decisions.

Over time, high-performing teams build, block by block, a broader set of value management activities into their operating models, creating a cumulative advantage. Technology plays a central role, freeing capacity from transactional work so teams can redeploy resources to higher-value activities.

Implications for You: *Building an Integrated System Block by Block*

Stand-up an integrated value management framework where risk management and data analytics guide actions with clearer targets, faster governance, and wider impact. Treat transformation as a building-block journey to expand capability step by step to embed sustainable practices and scale value delivery.

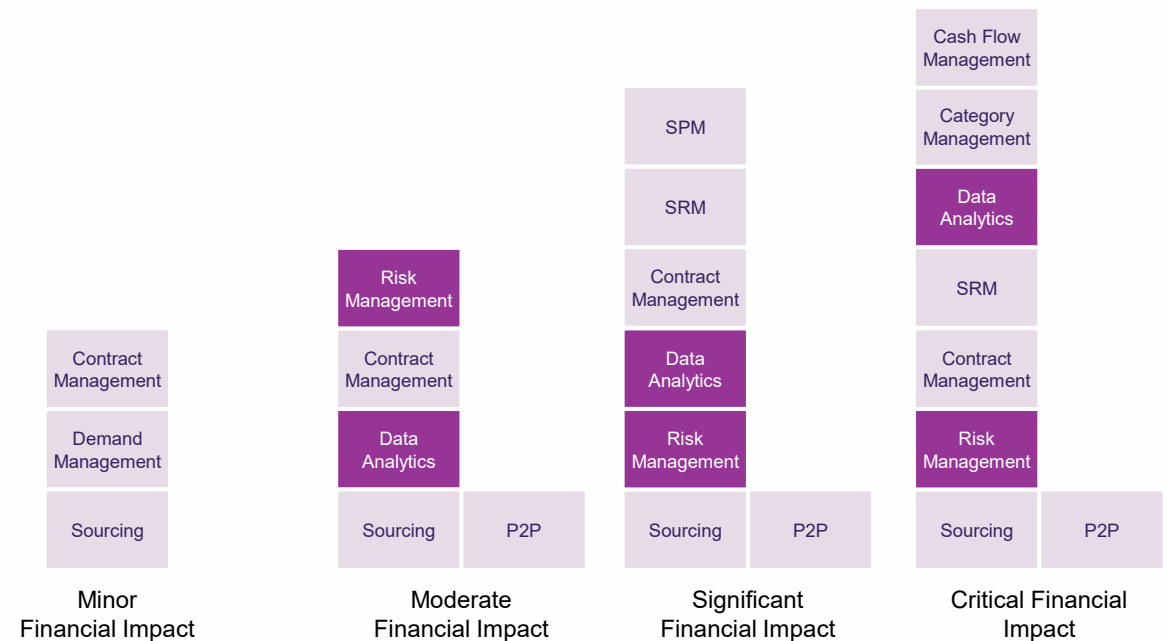


Figure 16. Average number of value management activities, as a function of procurement's financial impact

Large increase in activity since 2025

Converging strategies, different emphasis

AI and analytics dominate agendas, but leaders push further into value delivery and workflow digitisation

Digital is foundational to competitiveness, not optional.

Both Leaders and Followers place AI and data analytics at the top of their agendas, reflecting a multi-year trend in which digital technologies are seen as indispensable for achieving broader goals.

At the same time, upskilling has risen sharply in importance. Last year, talent development lagged behind technology as a strategy; now it sits in the top five for Leaders and climbs into the top three for Followers. This shift suggests a recognition that people must be equipped to work effectively with AI and analytics to get the most out of these investments.

Implications for You: *Balancing Running and Reinvention*

Operate a deliberate two-speed portfolio. First; shore up AI, digitisation and analytics with upskilling and process fixes to steadily improve efficiency and resilience. Dedicate the second speed to bold bets like co-innovation and new business and operating models. Teams mastering this balance escape getting stuck in incrementalism, using the first speed to drive stability and dependable value and the second speed to leap ahead with differentiated value creation.

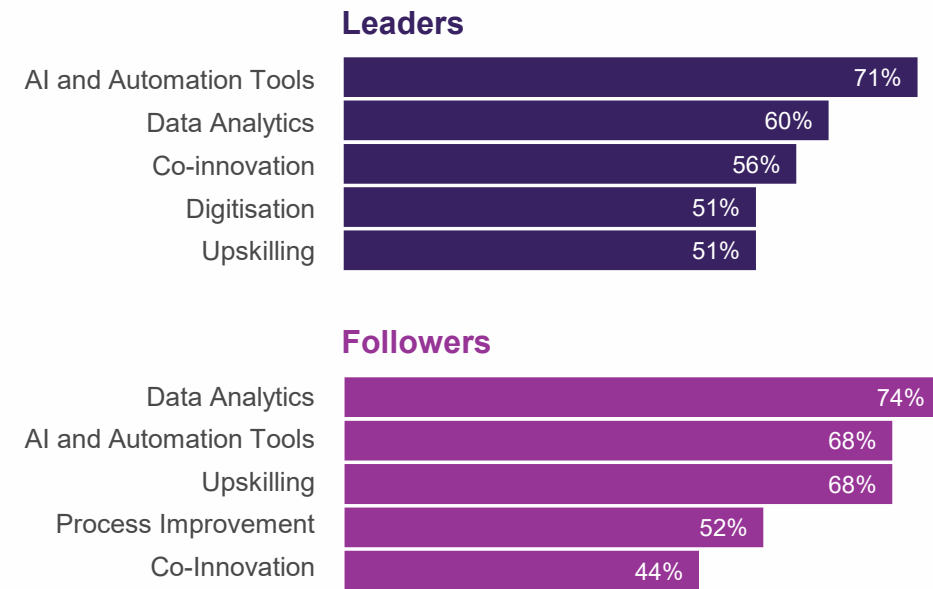


Figure 17. Most useful tools and strategies for procurement teams next 1-2 years

07 Workforce strategies shift with AI and uncertainty

From Headcount to 'Skill count': turning workforce design into a competitive advantage

Workforce priorities are shifting in response to AI adoption.

Teams invest in upskilling to shift tasks from routine to value-add. As AI takes on basic tasks, teams must shift from headcount to 'skill count', where skill quality and adaptability matter more than team size.

AI is changing roles. Many organisations are redesigning existing positions and building adaptable workforce models. Instead of junior hires managing routine work, teams redesign processes to reduce lower-value tasks and increase strategic contributions from existing employees. Currently, procurement teams have NOT indicated reduction in hiring of junior team members as a top priority; rather reallocating work that junior team members cut their teeth on.

The question is will this trend hold. Across the broader economy, concerns are emerging about reduced opportunities and pathways for entry-level talent. Procurement has not experienced significant disruption in junior hiring, but this is an area that requires monitoring as automation and AI adoption accelerate.

Implications for You: *From Headcount to Skill Count*

Make AI-native technology the enabler and redesign roles so automation absorbs routine tasks, while 'skill count' goals and continuous upskilling help amplify value delivery. This shifts procurement from fighting talent shortages to turning workforce design into a competitive advantage.

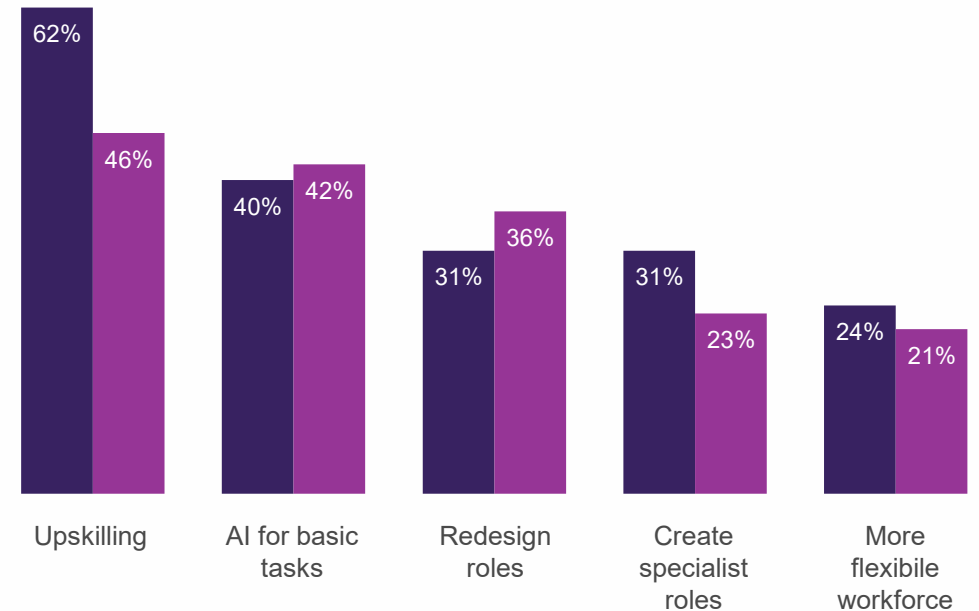


Figure 18. Talent strategy next 1-2 years

Leaders Followers

08 Leaders sustain value

Embedding operating model change helps Leaders lock in long-term gains, while Followers struggle to maintain results

There is a clear gap in sustaining operating model transformation value.

Two years after transformation, Leaders are twice as likely to fully sustain value than Followers. Followers reported backsliding in 73% of cases.

Teams often overestimate the benefits of transformations while underestimating the challenges of embedding holistic change. Leaders are more likely to implement transformation as an integrated approach across people, processes, and technology, which allows them to lock in value and achieve consistency beyond the initial implementation period.

Most teams have experience with transformation, but Leaders are ahead in translating that experience into sustained

outcomes. Followers are more active now in pursuing transformation, with 41% currently in some stage of transformation, compared to 12% of Leaders. However, without a stronger focus on sustaining mechanisms, many risk losing value over time.

Implications for You: *Lock in the Gains*

Design operating models with endurance in mind; align people, processes and technology from the outset so value is sustained. Without this discipline, organisations risk a cycle of gains that erode within months, undermining both credibility and the business case for future improvement and transformation.

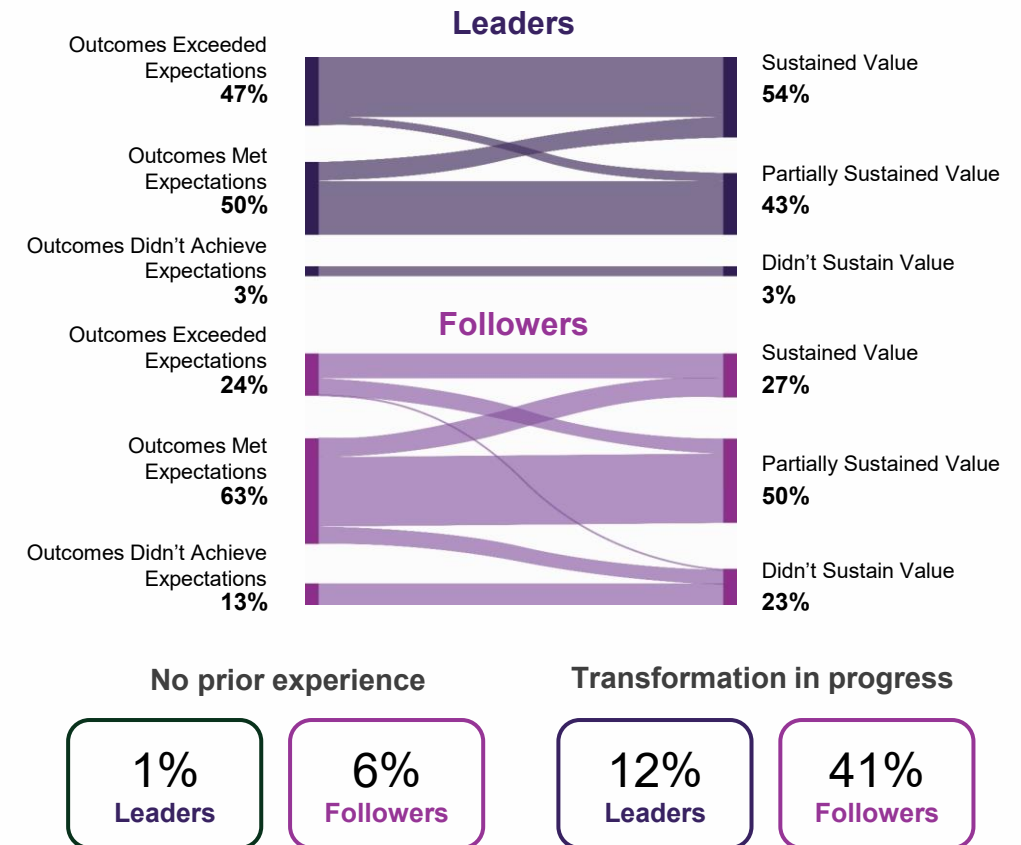


Figure 19. Operating model transformation value achieved and sustained

What makes transformation stick

Integration into BAU separates lasting change from short-lived initiatives

Sustaining transformation depends on embedding change so fully into the operating model and daily business that it becomes the new normal.

Leaders consistently point to integration of technology and operating models as the top factor for lasting success. Technology is central to enabling value, but its impact depends on how well it is aligned with processes and absorbed into BAU operations. Teams that treat technology as an external bolt-on often struggle to achieve the intended benefits, while those that embed it seamlessly are better positioned to sustain results.

Ultimately, transformation lasts when it disappears into BAU. By integrating tools, processes, and behaviors into the

everyday rhythm of the organisation, procurement teams ensure improvements stick and value endures over time.

Implications for You: From Project to BAU

Treat adoption as a core workstream, not a close-out task. Embed change into the everyday rhythm of the business; integrate new practices into BAU, secure senior sponsorships and make adoption part of daily operations. Use proven integration practices to lock in gains, such as sandbox validation, sponsorship, change discipline, and dedicated capacity. When transformation becomes the way we work rather than a side initiative, improvements compound over time and create resilience against disruption.

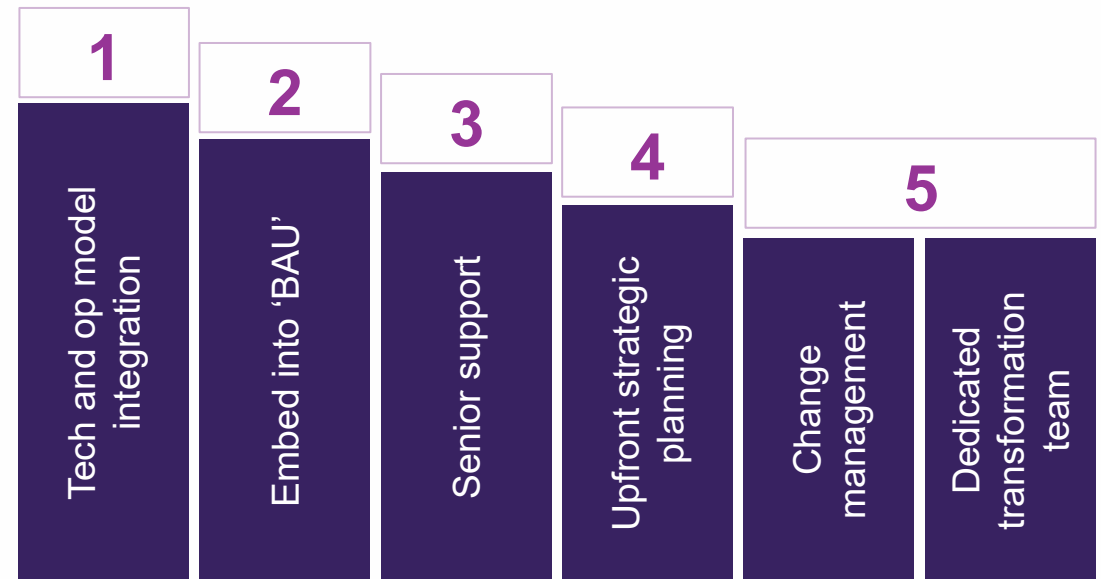


Figure 20. Leaders' top 5 areas for transformation success

In the long run

Adaptive procurement teams thrive in constant change

The most successful teams are not shielded from disruption, but are prepared for it.

Adaptive teams blend a range of enablers to fuel the 'adaptive operating model engine'. Adaptability is more than speed; it is the ability to anticipate what is coming next and course correct so the organisation can pivot while maintaining consistent, or even improved, operations and value delivery.

Being adaptive is critical for teams to thrive in environments that are rapidly being disrupted in large and unpredictable ways. While world-class adaptability 'future-proofs' organisations, it is not widely mastered by today's procurement teams. Only 13% of Leaders and 3% of Followers reported high levels of adaptability in the survey. This may be a

growing area of development as almost a third of teams reported recognising adaptability as a priority and have at least some initiative underway to mature their capability.

Implications for You: *Data analytics and AI sharpen foresight*

While strong collaboration and clear playbooks enable coordinated execution. Good risk management is the bedrock of adaptability, helping teams build the discipline, foresight, and confidence needed to manage larger change. The key is not only having the right mindset to look for disruption and be ready to pivot but making that mindset a shared culture. The right processes, systems, and governance turn adaptability into an operational habit.

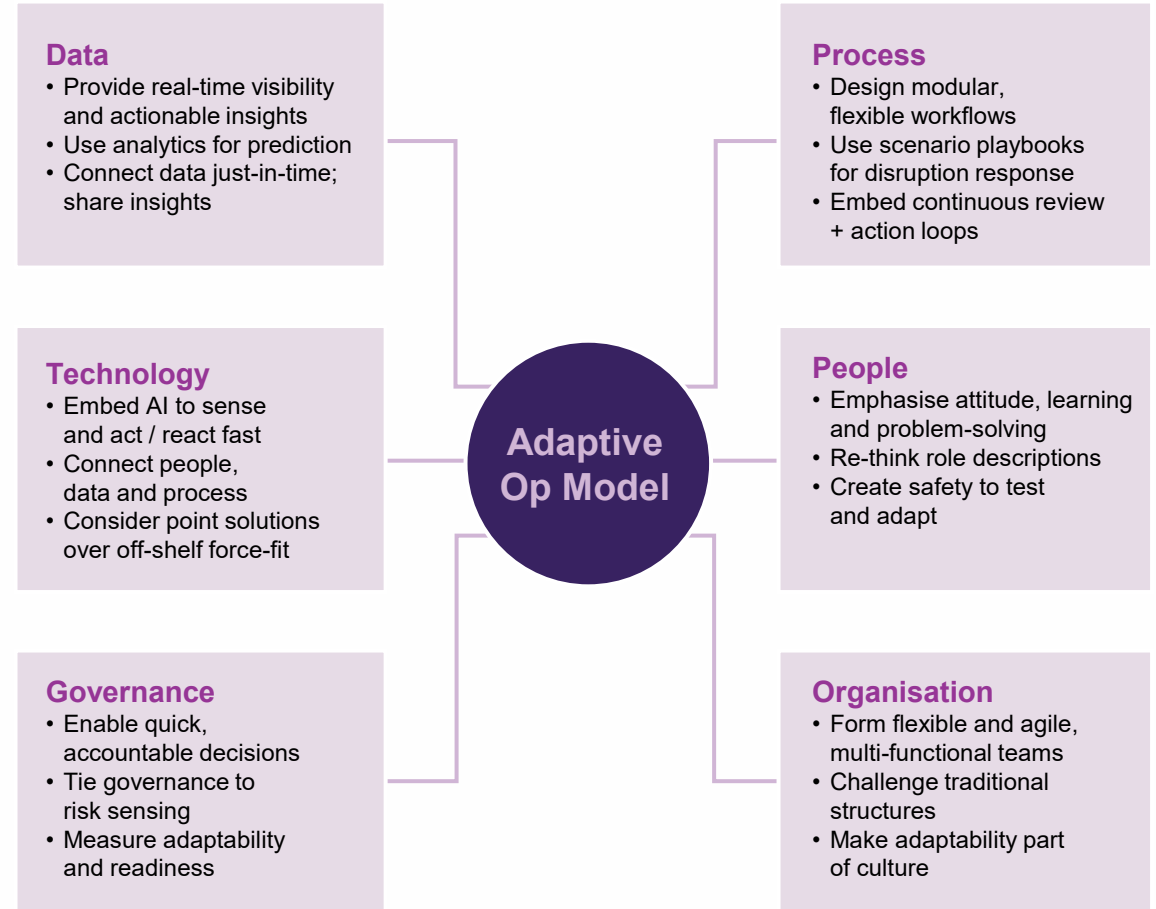


Figure 21. Adaptive Operating Model Engine

08 Adapt op models - Embed transformation, don't just launch it

From fragmented to focused; rebuilding for performance

Redesigning an operating model to unite people, process, and purpose



Centre-Led Clarity

New governance and operating model aligned accountability and decision-making across key strategic categories



Capability Uplift

Training, role redefinition, and analytics elevated procurement maturity and talent retention



Continuous Improvement

Embedded governance and data insights created ongoing visibility, compliance, and performance tracking

A major metropolitan city council transformed its procurement function from a fragmented, transaction-driven model into a high-performing, centre-led organisation that achieves strategic value, transparency, and confidence across its operations.

The council recognised that decentralised structures and inconsistent practices created duplication, unclear ownership, and limited visibility of total value delivered. The operating model lacked coherence and struggled to meet growing expectations from stakeholders, regulators, and the community. Feedback called for a more strategic, value-adding function with improved business and supplier partnerships.

In response, the council conducted a comprehensive review and shifted to a centre-led model built around key strategic categories and a Procurement Centre of Excellence (CoE) to drive consistency,

governance, and continuous improvement. Clear accountability was introduced through defined roles, service level agreements, and performance metrics, supported by business partners to strengthen collaboration.

To build sustainable capability, the council developed new role profiles, targeted learning pathways, and data-driven performance management frameworks. Governance and analytics were embedded into operations to enable real-time visibility of performance and risk. The council also invested in technology to automate low-value activities and free capacity for strategic and value-adding work.

Within two years, the procurement function achieved a step change in maturity, demonstrating stronger alignment to organisational goals, improved supplier relationships, and greater adaptability in responding to shifting priorities, achieving both efficiency and trust across the enterprise.

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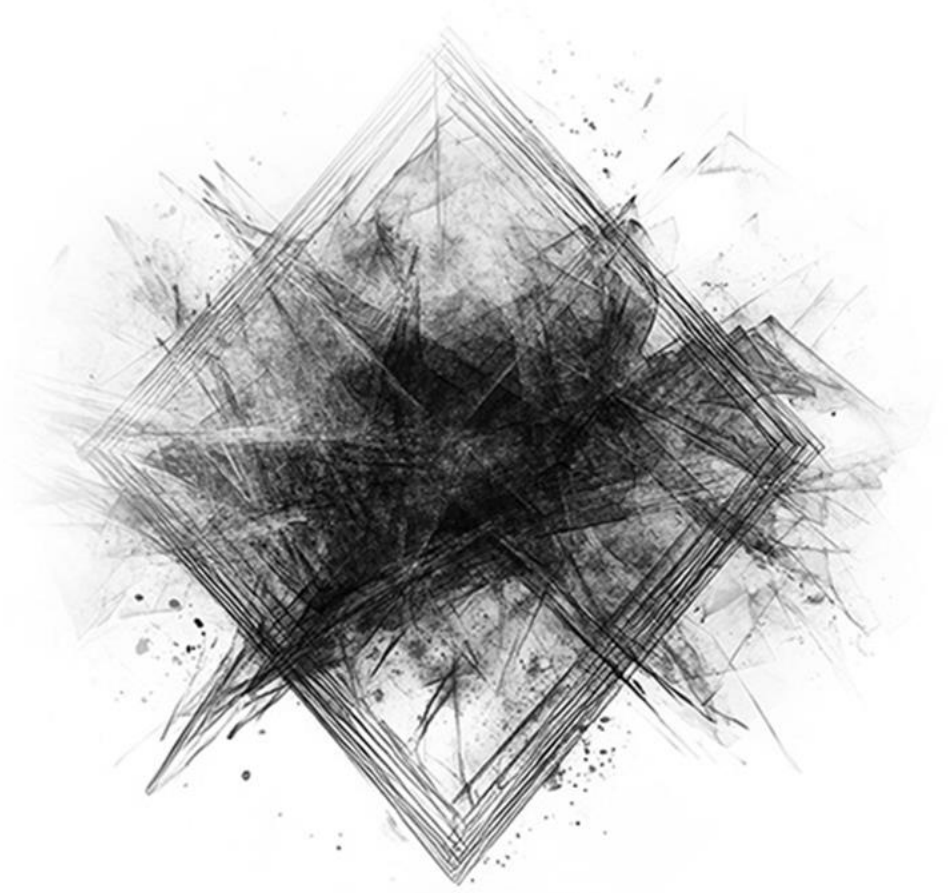
We now have a shared Procurement vision aligned to our Corporate objectives and an operating model that enables us to deliver value to our customers and community.

Head of Procurement, Local Government Council

Theme D

Activate advantage

Managing risk moves from protection to driving
resilience and competitive advantage



Activate advantage

Managing risk moves from protection to driving resilience and competitive advantage

Disruption isn't episodic, but an ongoing feature of procurement's operating environment.

Nearly 90% of teams experienced disruption in the past year, with most describing the impact as high or severe. The environment of constant volatility, from geopolitical tensions to supply chain fragility, means resilience is no longer optional. Leaders are distinguished by their ability to embed foresight, flexibility, and response mechanisms into everyday operations. This gap is leaving many Followers vulnerable, as disruption continues to reshape procurement's role in delivering stable and dependable value.

Theme Highlights

- **89% of teams** experienced disruption in the past year
- **51% described disruption impact** as high or severe
- Leaders are almost universally prepared for disruption, with **93% feeling well or moderately prepared**
- By contrast, over **a third of Followers report being minimally prepared or not prepared**
- **Teams that are prepared** miss targets at one-quarter the rate of unprepared teams

09 Disruption is near universal

Volatility is no longer the exception, it's the environment teams must master

Disruption has become a near-universal reality for procurement teams.

Disruptive events have directly impacted 89% of teams in recent years, with half of organisations describing the effects as high or severe. The nature of disruption is broad: economic volatility, rapid technology shifts, supply chain fragility, and operational shocks.

Geopolitical influences have re-emerged at levels not seen since the Cold War, following a decades-long period when businesses were more accustomed to stability. The return of geopolitical disruption as a constant is forcing teams to adapt to an environment that feels unfamiliar to many in this generation of Leaders.

For procurement, this has created an environment where risk management is no longer optional but critical. Shifting resilience from a crisis response to a permanent capability ensures procurement can protect value and maintain supply, even under volatility.

Implications for You: *Design for Disruption*

Anchor strategies on the assumption that disruption is a 'when', not an 'if' event. Build resilience, adaptability and competitive advantage into BAU through fully integrated processes and governance with volatility front of mind. Teams that normalise and expect disruption as a baseline outperform, avoiding the false comfort that stability is BAU, gaining resilience other lack.

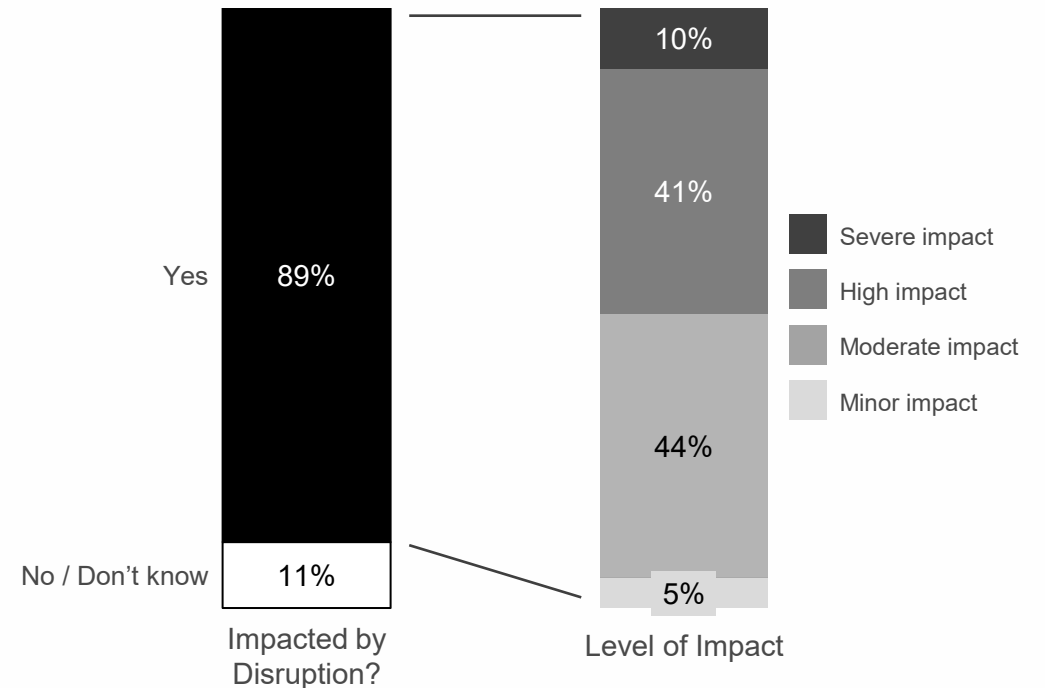


Figure 22. Impact of disruption in last year

Prepared or exposed? The readiness divide

Leaders almost universally prepared but many Followers remain unprepared, even in the face of major disruption

Teams' readiness to handle disruption varies sharply.

Among Leaders, nearly all are at least moderately prepared for disruption. For Followers, over a third admit to being minimally prepared or not prepared at all. This readiness gap is concerning in a world where disruption is not just possible but highly likely to recur.

The effects are significant. Every Leader reporting a high-cost disruption was prepared, reducing the risk of repeat failure. In contrast, nearly one-third of Followers hit by disruption were unprepared despite previous experience. Teams with strong preparation missed targets just 5% of the time, compared with 18% for those poorly prepared, almost 4x higher, creating disproportionate exposure to repeated setbacks and prolonged recovery times.

Implications for You: *Readiness as Muscle Memory*

Build integrated resilience linking procurement with enterprise risk, scenario planning and stakeholder alignment to ensure readiness. Treating risk as a continuous capability and not a one-off exercise creates a decisive payoff: fewer misses and faster stabilisation when it counts.

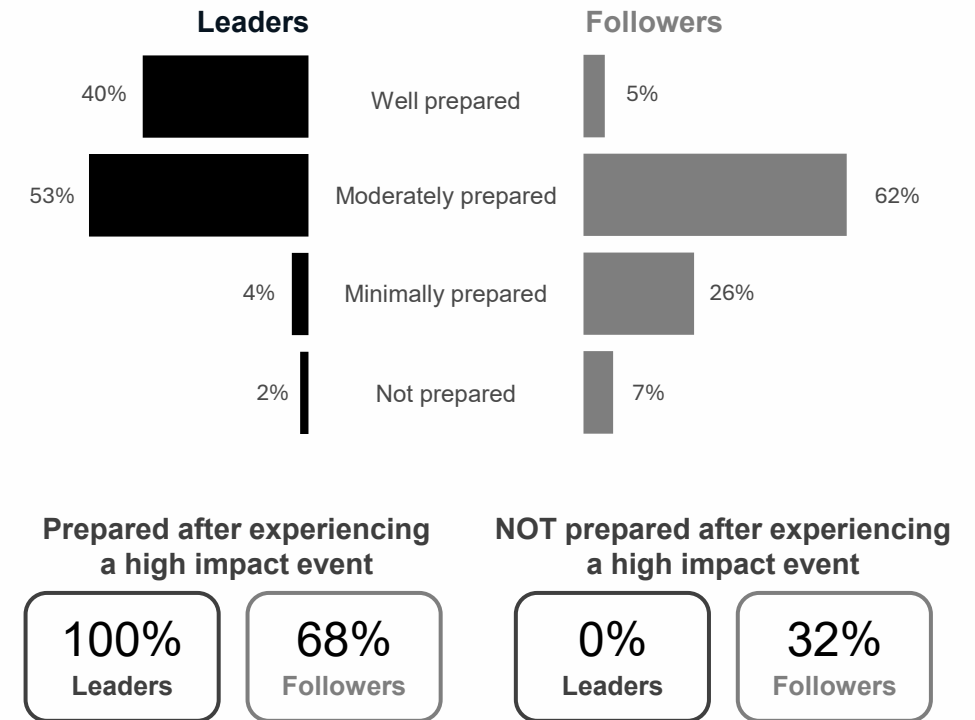


Figure 23. Level of disruption preparation

10 Risk, a shield and springboard

Leaders turn risk into a source of advantage while Followers remain focused on defense

Risk management is emerging as a source of competitive advantage.

For most teams disruption mitigation is a priority, focusing on core capabilities of maintaining cost stability and operational and supply resiliency.

Leaders are advancing beyond these basics, investing in strategies to capture upside opportunities, such as leveraging market signals for better sourcing positions or using predictive analytics to anticipate demand shifts. This more strategic orientation reflects an intent to use risk management as a lever for competitive advantage rather than simply a protective shield.

Followers remain closer to the basics, focusing on stability and compliance. This suggests that while nearly all organisations recognise the importance of risk management, only some are transforming it into a proactive, forward-looking capability capable of capturing competitive advantage.

Implications for You: *From Shield to Springboard*

Treat risk as a performance system, not a compliance exercise. Incorporate market / supplier sensing into the standard playbook, decision rights and commercial levers that procurement can respond to and reposition in real time. Build readiness into people, process, technology, governance, and data foundations, so resilience becomes muscle memory, not a scramble. The payoff is fewer misses, faster stabilisation, and the ability to turn volatility into competitive strength.

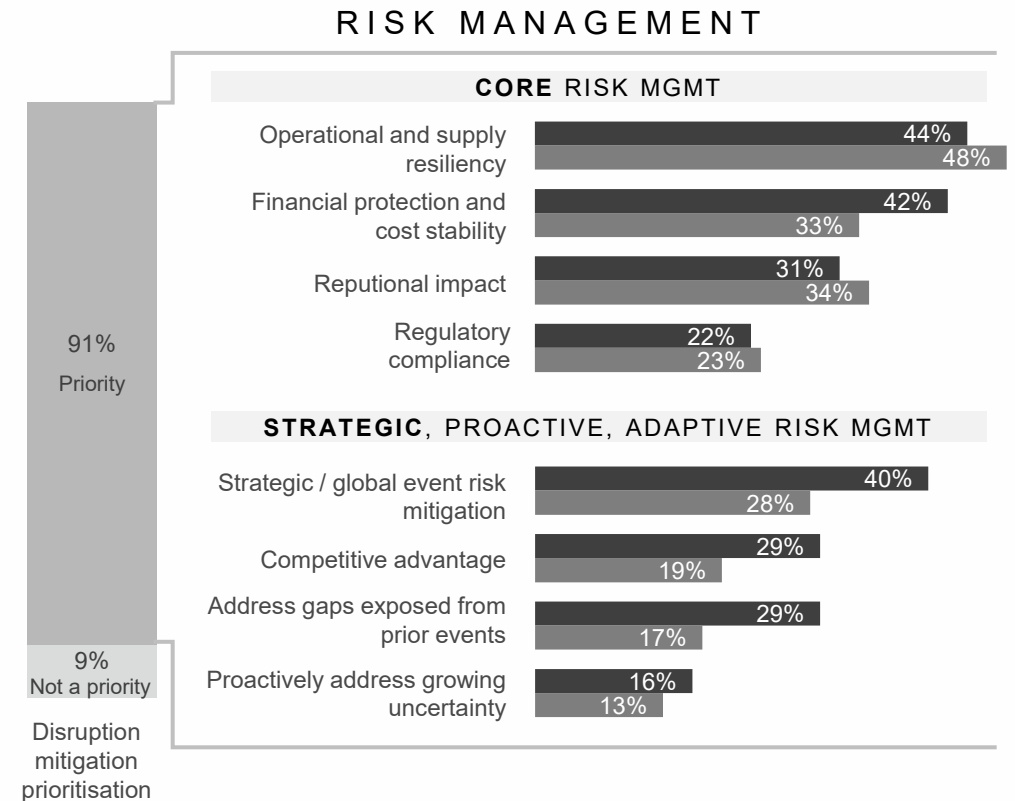


Figure 24. Disruption preparation focus

Leaders Followers

10 Activate advantage - Create opportunity through risk management

The advantage of anticipation

Scenario-driven visibility turned supply shocks into predictable, priced decisions



Signal-to-action loop

Upstream indicators trigger playbooks, turning surprises into planned responses fast.



Optionality, not bets

Pre-negotiated alternates, surge capacity and price-index clauses protect margins under volatility.



Resilience as edge

Deep visibility secured priority supply while peers curtailed output and margins.

A major miner relied on a narrow set of bulk inputs such as fuel and foundation commodities, where disruptions were mitigated by large local buffer stocks. After depleting storage space for local buffers but still unable to withstand short-term disruptions, the company built a risk-based scenario modelling capability to assess flow-down impacts and model cost-risk optimised alternatives.

The team mapped supply paths to origin, modelling disruptions such as refinery outages, export quota shifts, port congestion, and industrial action. Each disruption was linked to early warning indicators including inventory levels, vessel flows, strike ballots, and government notices. Thresholds now trigger playbooks that pre-position inventory, switch lanes, or activate alternate suppliers.

The model priced options, not just avoided loss. Operators quantified the value of reconfiguring networks, securing freight, and adjusting sourcing strategies. Buffers shifted from static to dynamic, sized by risk and commercial value.

The outcome is a shift from reacting to events to competing through foresight. When a regional outage hit, upstream alerts triggered early action, securing supply and maintaining output. Risk management became a profit lever, with faster recovery, better contract terms, and priority treatment during tight markets. Finance now treats resilience as margin protection rather than overhead.

“

With high regional supply concentration of critical inputs, scenario modelling gave us the ability to articulate the critical risk we were carrying and the case for change to the Board

CPO, mining major

Redefining the edge of procurement

The future will be defined by the ability to deliver value in the age of AI and disruption

Expectations are rising faster than performance.

Procurement must deliver broader value as AI and uncertainty reshape how success is defined. Traditional playbooks alone cannot keep pace. How can procurement deliver measurable, trusted, and sustainable value in an environment defined by accelerating AI capabilities and systemic uncertainty?

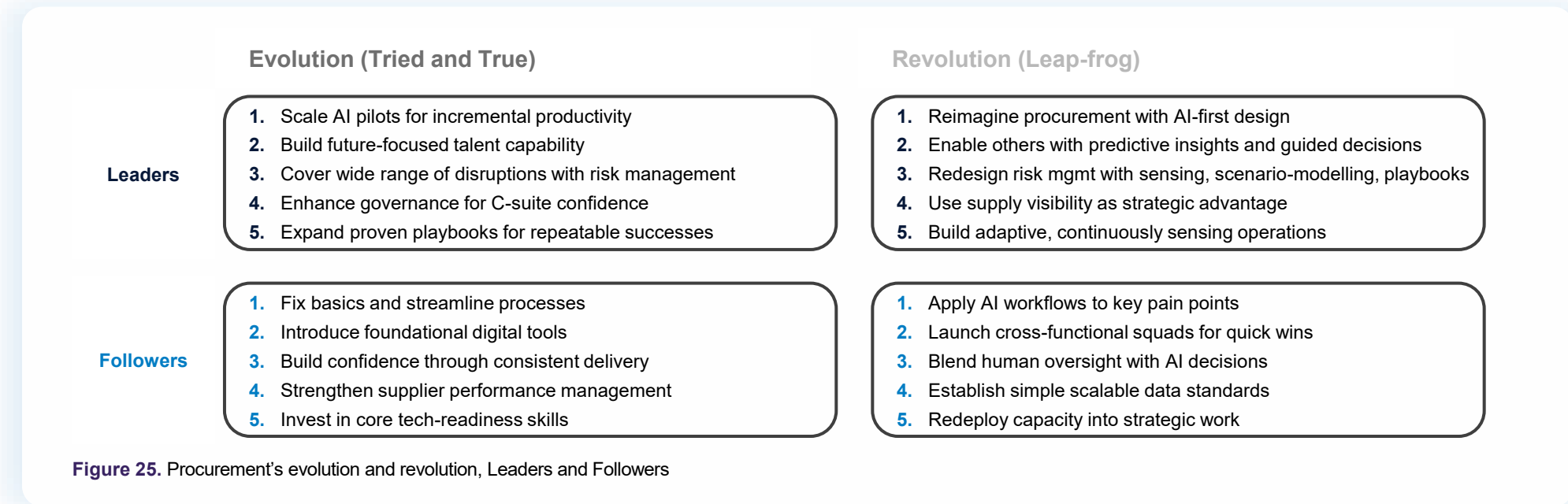
Looking ahead, procurement's frontier lies in blending human capability, technology, and adaptability. As teams decide their strategies to build a next generation procurement function, it is critical to remember that AI, and technology more generally, is not a substitute for human judgment; it is a force multiplier. By freeing capacity, surfacing insights, and enabling

predictive decisions, AI allows procurement professionals to focus on strategic influence, stakeholder trust, and innovation at scale.

The imperative is the same for all teams: deliver measurable, trusted, and adaptable value in a world where disruption is constant. Procurement's future belongs to teams that deliver more value, use AI as an amplifier, build adaptive operating models, and activate advantage with confidence and speed.

The paths forward: Delivering value in the age of AI and uncertainty

The question is no longer if procurement must deliver amplified value, but how boldly it can expand its impact amid disruption and accelerating expectations.



The 2026 survey highlights a widening divide in how procurement teams are evolving. Procurement teams must choose between consolidating proven ground, building on established practices, or leaping ahead into new models, redefining procurement's role. To capture this dynamic, we present a split-screen view of an evolutionary and revolutionary path. Each organisation must weigh priorities, culture, risk appetite, and resources to choose a path that amplifies value and achieves lasting impact.

2026 survey provides broad view of procurement teams and value

The 2026 Procurement Value Survey reflects a broad and diverse respondent base, capturing perspectives from across industries, geographies, and organisational roles.

Participants included senior procurement leaders such as CPOs and Heads of Procurement, alongside procurement adjacent executives from senior management teams, Finance, IT, Operations, and Supply Chain, ensuring both procurement-focused and business-wide viewpoints are represented.

The survey provided global coverage from 400 respondents across 32 countries, with strong representation from mature markets, complemented by responses from emerging markets. Additionally, in depth interviews were conducted with senior procurement leaders for additional depth of insight.

By combining a broad range of perspectives, the survey provides a balanced picture of procurement's role today and its potential to achieve greater value tomorrow. This breadth of participation ensures the findings speak to both the current realities and future ambitions of the profession.

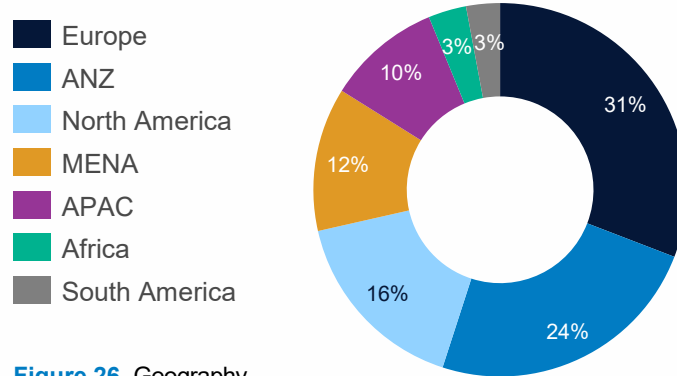


Figure 26. Geography

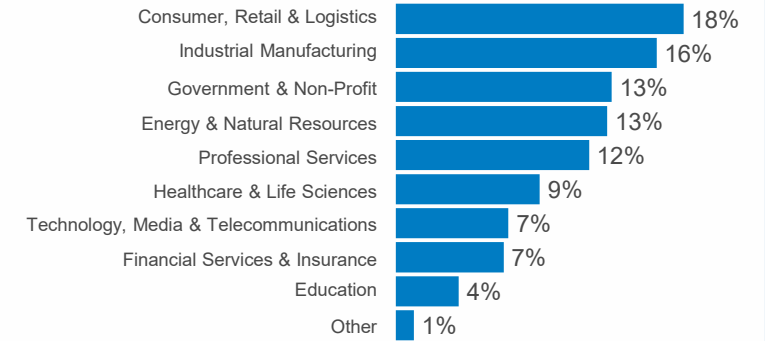


Figure 27. Industry

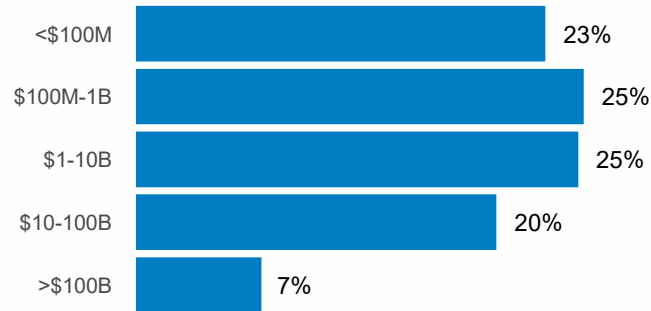


Figure 28. Revenue (USD)

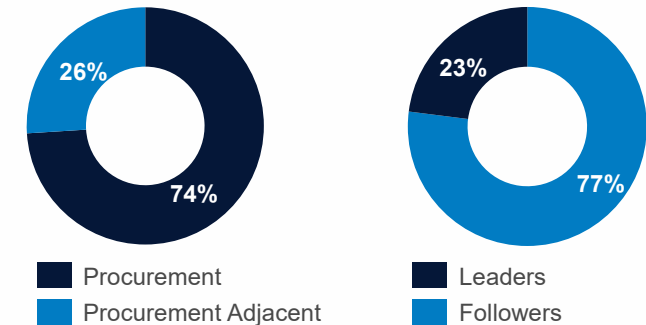


Figure 29. Roles / Leaders and Followers

Infosys Portland

For over 25 years, our clients have realised sustainable value and positive bottom-line impact by leveraging better procurement and supply chain processes, people, and technology

We offer our clients:



Strategy and advice

We combine deep domain expertise with leading practice and analytical rigour to help businesses solve their most complex problems.



Delivery and implementation

We execute strategies quickly and efficiently, which helps our clients realise benefits quickly.



Ongoing support

We help our clients manage their day-to-day operations to deliver further efficiencies.



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The background of the slide is a complex, abstract composition of blue lines and shapes. It features a large, multi-layered diamond or star-like structure in the center, composed of numerous overlapping, slightly offset lines that create a sense of depth and movement. The lines vary in thickness and opacity, with some appearing as sharp, dark strokes and others as lighter, more ethereal wisps. The overall effect is a dynamic, almost crystalline pattern that fills the right half of the slide. On the left side, there are solid blue vertical bars of varying heights, and a white rounded rectangle containing the copyright text.

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