PwC's global digital procurement survey

6th Edition

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Daniel Cameron

Partner, PwC UK

Digital Procurement Lead

Francesco Bandolin

Partner, PwC Italy

Digital Procurement Lead

We are delighted to present the findings of our latest global digital procurement survey; our view of the current state of digital transformation across procurement functions.

We recognise that procurement is at an inflection point. Organisations across every sector are grappling with how best to harness digital technologies, centred around embracing artificial intelligence and how to drive efficiency, enhance decision-making, and unlock strategic value from their supply chains.

This survey was conducted in collaboration with the global PwC network, drawing on the perspectives of procurement leaders and practitioners from a broad range of industries and geographies.

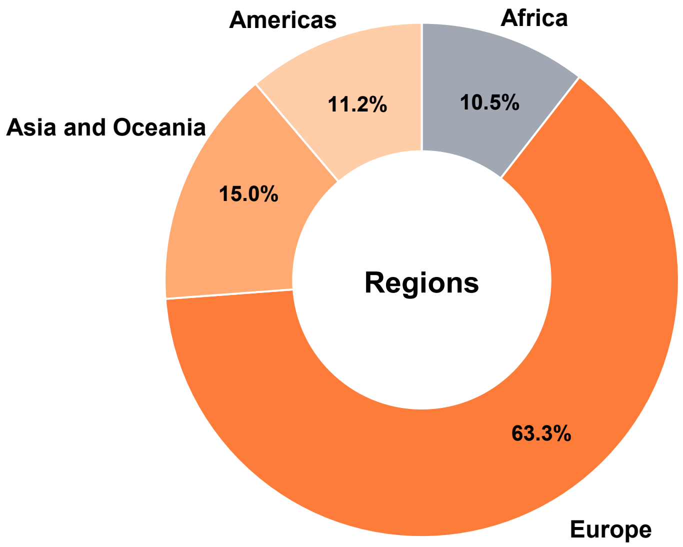
We would also like to thank a number of our key alliance partners who have supported and attributed their own insights and experience within this report; Coupa, Ivalua, Brooklyn Solutions, Agiloft, Zip, and ODGERS.

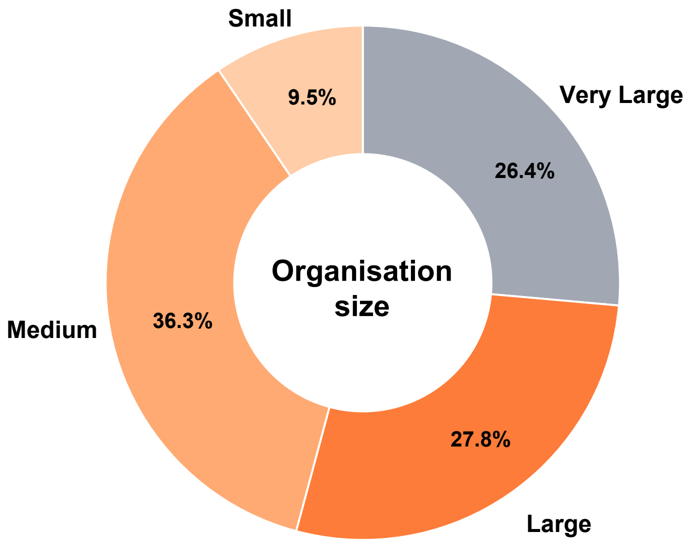
We look forward to continuing the conversation on how we can collectively advance the digital procurement agenda.

> Procurement is at an inflection point. Organisations across every sector are grappling with how best to harness digital technologies.

Survey respondents’ demographics

To gather market insight, we’ve engaged a diverse pool of global respondents





58%
Global remit

27%
Regional remit

15%
Country remit

31%
CPO/Exec Committee

*** %’s based on complete answers**

Geography

- Europe (63.3%).
- Asia and Oceania (15.0%).
- Americas (11.2%).
- Africa (10.5%).

Size of company

- **Small** (<$50m revenue and/or <250 employees).
- **Medium**
  ($50m – $1.5bn revenue and/or <5,000 employees).
- **Large**
  ($1.5bn – $10bn revenue and/or 5,000+ employees).
- **Very Large** ($10bn+ revenue and/or 5,000+ employees).

Reach of impact

- The survey captures responses from a wide range of respondents with varying geographic remits.
- A third of the respondents to this survey are CPOs or members of the Executive Committee of their respective organisations.

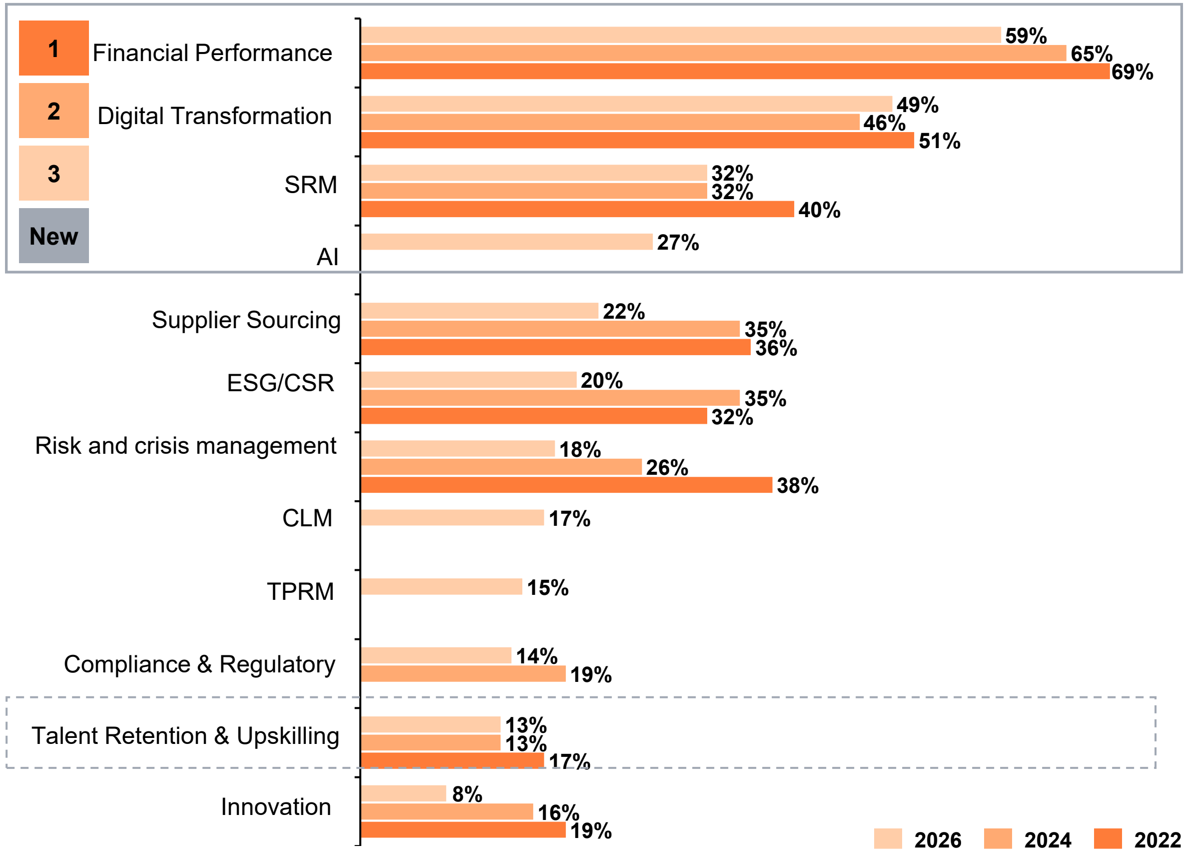
01

Procurement function priorities

Strategic priorities

Procurement functions have shown a consistent prioritisation of financial performance

Top immediate strategic priorities for Procurement functions



PwC Global Digital Procurement Survey, 6th edition. Question: What are the top 3 strategic priorities for your Procurement department for the year to come?

*** %'s based on complete answers**

Sustained focus on financial performance

- Financial performance remains the top priority at 59%, though it has steadily declined from 69% (2022) to 65% (2024), suggesting procurement leaders are distributing attention across a broader set of objectives and priorities.
- The priority remains alongside continued macroeconomic uncertainty from inflation, geopolitical volatility requiring CFOs to keep an eye on the bottom-line.

Changing landscape as new priorities enter

- AI enters the rankings for the first time at 27% (4th place), reflecting the mainstreaming focus on generative capabilities.
- CLM (17%) and TPRM (15%) also appear as new standalone categories, signalling procurement's expanding ownership of the contract value chain and regulatory compliance.
- ESG/CSR has fallen sharply (35% to 20%), reflecting its maturation from a standalone initiative into business-as-usual activity embedded within existing processes or separate functions.
- Digital Transformation holds steady at 49% (up from 46%), underscoring technology as the core enabler of these newer priorities.

Risk and crisis management

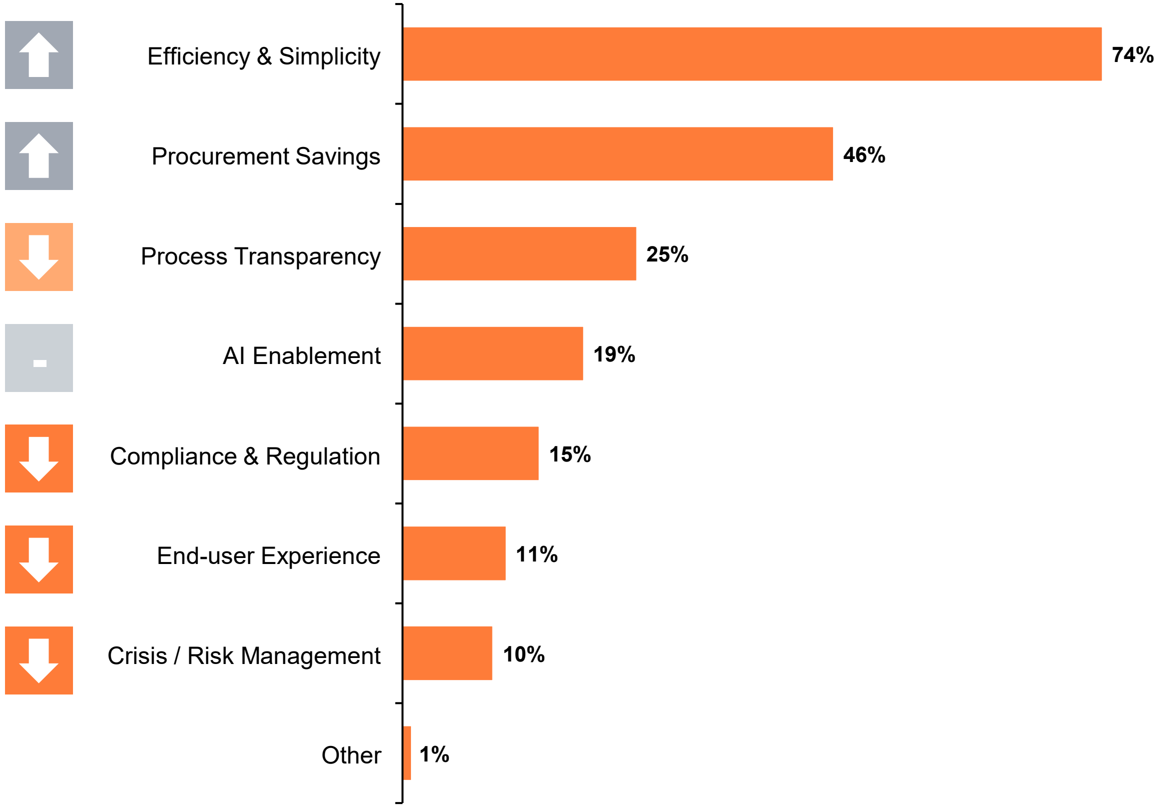
- Risk and Crisis Management has seen the steepest drop of any category (from 38% (2022) to 26% (2024) to 18% (2026)).
- The 2022 peak coincided with global supply-chain shocks. leading organisations to invest in risk infrastructure.
- Rather than risk becoming less important, we can see fragmentation into sub-functions.
- Market expectation is that procurement risk will increasingly be operationalised through AI-driven early-warning systems rather than treated as a periodic strategic initiative.

'With transformation being a high priority, we see discrepancy in the low priority of talent to implement these changes'.

Drivers for transformation

The need for transformation across departments is driven by efficiency and savings aligned to priorities

Key drivers for transformation across Procurement functions



PwC Global Digital Procurement Survey, 6th edition. Question: What are the two main drivers of your digital transformation journey?

*** %'s based on complete answers**

Efficiency remains the dominant driver of transformation

- Efficiency remains the dominant driver of transformation.
- Efficiency and simplicity leads at 74% and is trending upward, confirming that procurement functions continue to prioritise eliminating manual effort and accelerating cycle times above all else.
- Procurement savings (46%, also rising) is increasingly paired with efficiency goals, reflecting a shift from one-off negotiation wins toward structural process improvement and sustained margin protection.
- This dual emphasis aligns with broader CFO scrutiny of procurement's contribution amid inflationary pressures and supply-chain volatility.

Transparency and control highlight ongoing process challenges

- Process transparency (25%) and compliance/regulation (15%) have both trended downward, yet visibility and control remain a stated focus for many organisations.
- The decline suggests some progress in embedding analytics, but fragmented data environments persist across much of the market.

Emerging capabilities are not yet priorities

- End-user experience (11%) and crisis/risk management (10%) have both declined, indicating these remain secondary to foundational transformation.
- Despite significant market attention on generative AI in procurement (contract analysis, spend classification, autonomous sourcing), most organisations are still digitising core processes before layering on advanced technology.
- Low end-user experience scores underscore a persistent challenge: procurement tools are often designed for process compliance rather than user adoption, contributing to change-management difficulties.

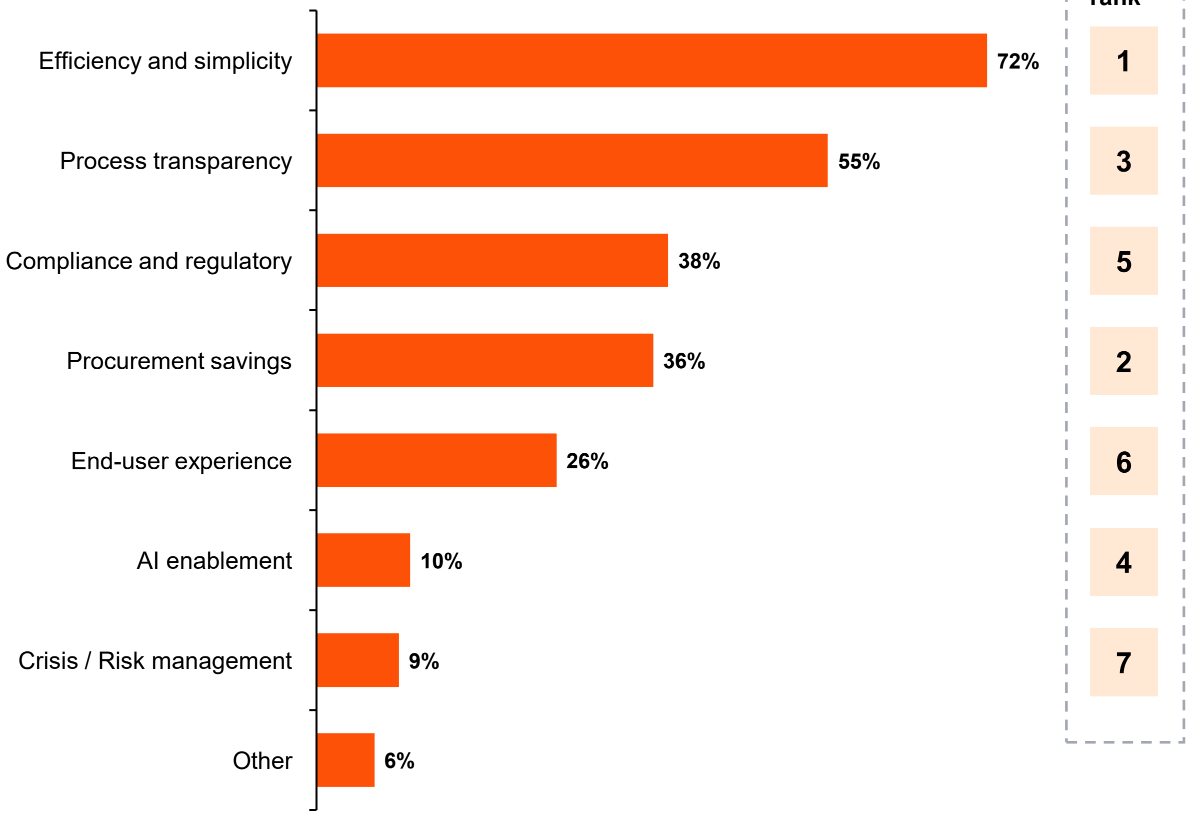
02

Overview of digitalisation today

Perception of digital tools

Digital tools at present can be seen as a key enabler to drive towards goals

Top perceived benefits of digital procurement tools



PwC Global Digital Procurement Survey, 6th edition. Question: What are the benefits delivered by your Digital Procurement tools? (please select 3 choices maximum)

*** %'s based on complete answers**

Efficiency remains the dominant value proposition

At 72%, efficiency and simplicity is the top perceived benefit and the number one driver for change, reflecting a clear market consensus that digital procurement tools deliver the most immediate value through automating manual, repetitive processes.

This aligns with broader market pressures on procurement functions to do more with less, where streamlining approvals, purchase orders, and invoice processing remains the most accessible and measurable return on digital investment.

The AI paradox – Strategic importance vs. current delivery

AI enablement registers just 10% as a perceived benefit yet holds driver rank 4, signaling that organisations view AI as strategically vital for procurement's future despite current tools failing to deliver tangible outcomes.

The market is clearly in an investment and experimentation phase – betting on AI's potential in areas like spend analytics and supplier risk scoring – but maturity and trust in these capabilities have yet to catch up with ambition.

Procurement savings – High priority, underwhelming tool performance

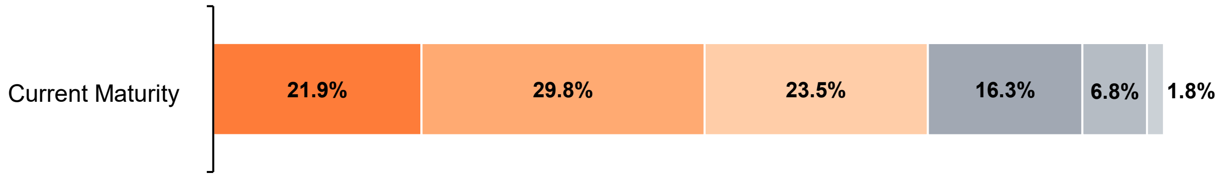
Procurement savings is the 2nd highest driver for change, yet only 36% of respondents see it as a benefit delivered by digital tools, exposing a notable gap between cost reduction mandates and what technology currently enables.

This suggests an opportunity for procurement teams to better connect digital capabilities – such as contract compliance monitoring and maverick spend detection – to demonstrable financial outcomes.

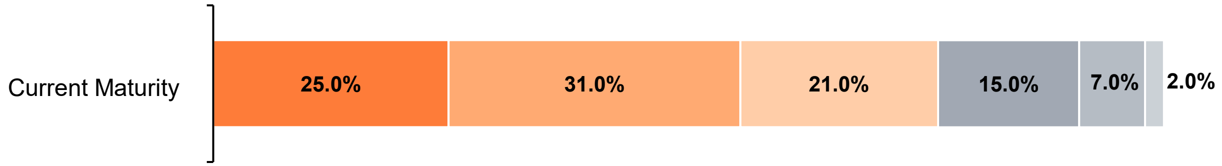
Digitalisation today

Whilst aware of benefits, maturity of digital tools remains low across organisations

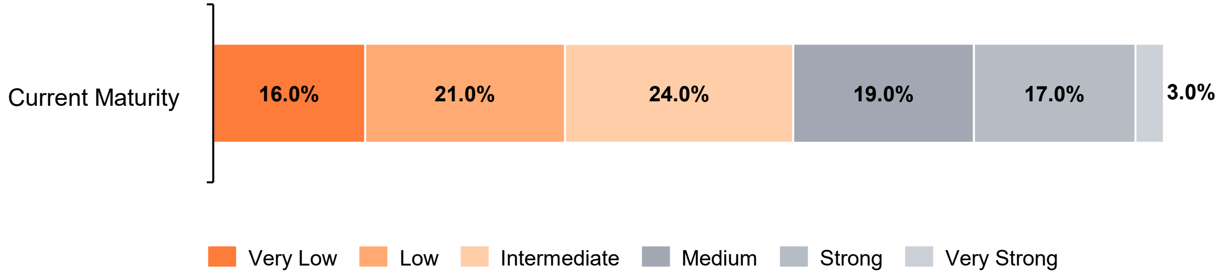
Maturity of S2C processes digitalisation



Maturity of supplier management processes digitalisation



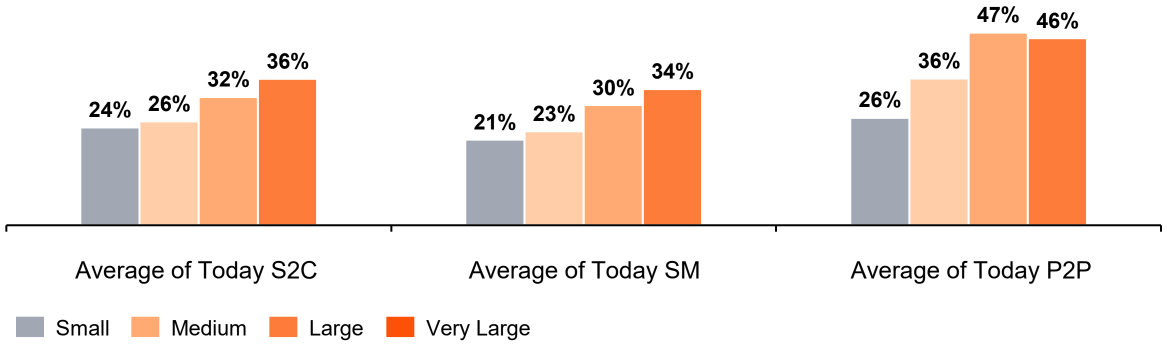
Maturity of P2P processes digitalisation



PwC Global Digital Procurement Survey, 6th edition. Question: What is the current degree of maturity of the S2C/supplier management/P2P process digitalisation?

*** %'s based on complete answers**

Maturity of digital tools by organisation size (weighted average by %)



PwC Global Digital Procurement Survey, 6th edition. Question: What is the current degree of maturity of the S2C/supplier management/P2P process digitalisation?

Clear hierarchy of benefits, but limited maturity across procurement processes

- Strong alignment on the value of digital tools, led by efficiency and process transparency.
- However, maturity remains low, with most organisations operating below 50% automation.

Significant gap between expected value and actual digital execution, with variation by company size

- While benefits are well understood, many organisations have yet to fully embed digital solutions.
- Larger organisations show higher maturity, while SMEs remain concentrated in early-stage digitalisation.

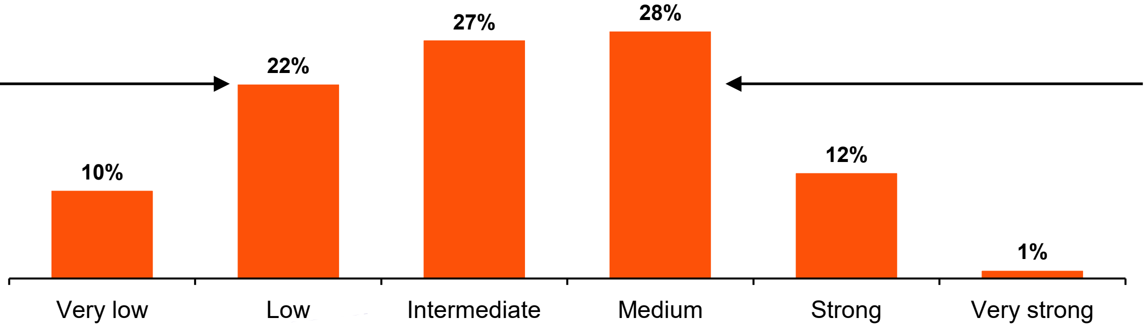
Digitalisation today

Data analytics is an area that progress has been seen and maturation is stronger

Data analytics maturity

Advanced analytics capabilities remain limited

A significant proportion remain at low maturity, while only a small number have reached strong or fully mature analytics capabilities.



Data analytics maturity is progressing, but remains mid-tier

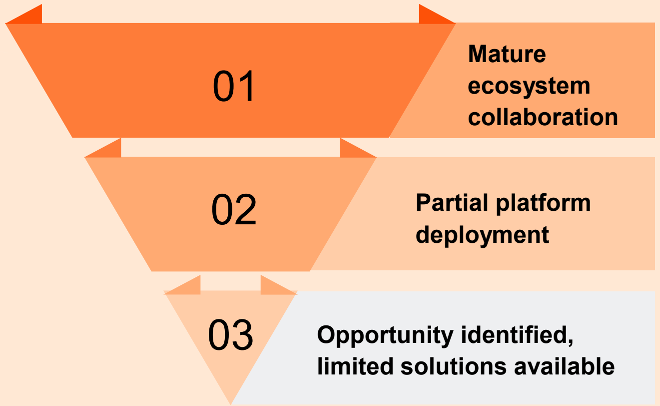
Most organisations operate at intermediate to medium levels of maturity, indicating growing adoption but limited advanced capabilities.

PwC Global Digital Procurement Survey, 6th edition. Question: What is the current maturity of Data analytics within your Procurement department?

Collaboration tools maturity

Ecosystem collaboration lags behind analytics maturity

While data analytics capabilities are progressing across procurement functions, collaboration ecosystems remain significantly less mature, highlighting a **gap** between **internal capability development** and **external value chain integration.**



Limited maturity of collaboration ecosystems

Only a small proportion **(~8%)** have achieved fully integrated collaboration platforms.

Partial adoption reflects early-stage development

Collaboration tools are deployed in a limited and fragmented way **40% report some level of deployment.**

Significant gap between ambition and available solutions

Many organisations recognise the opportunity but lack suitable solutions – **35% identify opportunity without viable solutions.**

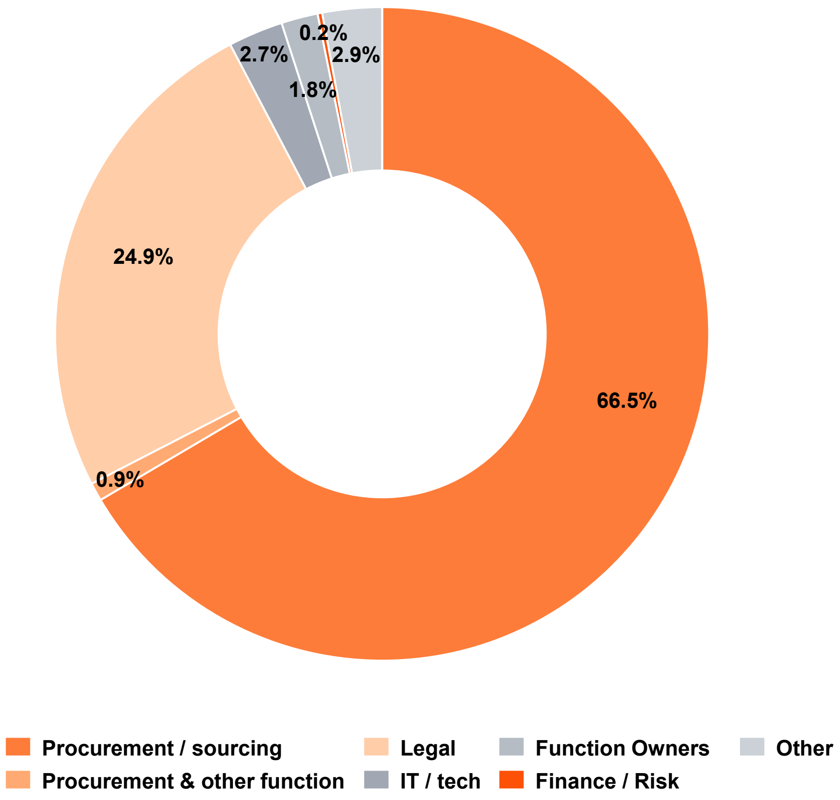
PwC Global Digital Procurement Survey, 6th edition. Question: What is your opinion about the implementation of collaborative digital tools within the procurement ecosystem?

*** %'s based on complete answers**

CLM capabilities

CLM as an enabler demonstrates procurement's central role in supporting business functions

CLM tool owners for organisations with a solution



PwC Global Digital Procurement Survey, 6th edition. Question: Within your company, who is the overall sponsor of Contract Lifecycle Management?

*** %'s based on complete answers**

Top 3 benefits driven from a CLM tool within organisations

01	02	03
Improved risk management (legal and commercial)	**Process efficiency, including the integration with S2P**	**Management of contractual obligations**

PwC Global Digital Procurement Survey, 6th edition. Question: Where do you see the greatest benefit of using a CLM tool?

- **Procurement owns CLM**, but it is increasingly an enterprise tool. Procurement/sourcing functions account for the majority of CLM ownership, yet Legal, IT, and Finance also feature as owners – reflecting CLM's evolution from a departmental utility into a cross-functional governance platform. Notably, only around 1% of respondents lack a CLM solution entirely, signalling near-universal adoption.
- **Risk management now outranks pure efficiency as the primary CLM value driver**. The top three perceived benefits – risk management, process efficiency/S2P integration, and obligation management – suggest procurement leaders increasingly justify CLM investment through compliance and risk lenses rather than cost savings alone. This aligns with rising regulatory pressures (e.g. ESG reporting, supply-chain due diligence) that demand greater contractual visibility.
- **Integration with broader S2P ecosystems and AI capabilities will define the next wave of CLM value**. The prominence of S2P integration as a top benefit indicates organisations are moving beyond standalone CLM towards connected digital procurement architectures, where AI-driven clause analysis and obligation tracking amplify the risk and efficiency gains highlighted in the survey.

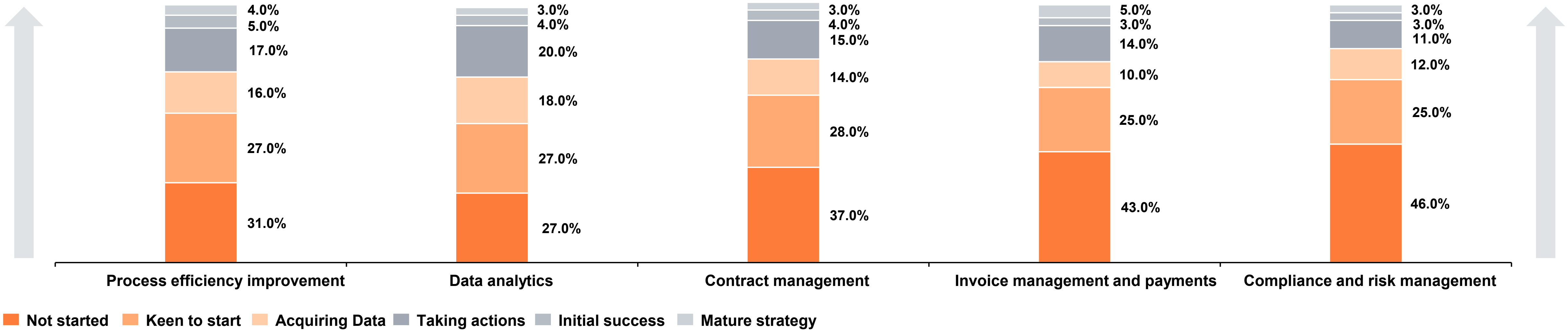
Eric Laughlin
CEO, Agiloft

> "The survey confirms what we're seeing: CLM has outgrown its role as a legal utility. As procurement takes ownership, the contract becomes the connective tissue of the S2P stack, a governed layer that operationalises obligations rather than just storing documents. The winners won't own the whole stack; they'll be the ones that integrate cleanly and turn contract data into action.

AI adoption

The emergence of AI requirements, whilst still immature, illustrates a huge appetite to be explored across use cases

Where are we in our AI adoption journey in relation to key use cases?



PwC Global Digital Procurement Survey, 6th edition. Question: Where in the AI adoption journey is your procurement organisation across the following parameters – process efficiency improvement, data analytics, contract management, invoice management and payments, compliance and risk management?

The reality of AI maturity in procurement

Despite the volume of market discourse around artificial intelligence, the survey data reinforces that the vast majority of organisations remain in the early stages of their AI adoption journey within procurement. Most respondents are still operating at a pilot or exploratory phase, with very few having progressed to scaled, enterprise-wide deployment of AI-enabled use cases such as spend analytics, supplier risk monitoring, or contract lifecycle management.

*** %'s based on complete answers**

Perception versus reality

Interestingly, while organisations may assume their peers are racing ahead with AI in procurement, the data suggests otherwise. There is a notable perception gap: businesses tend to overestimate the maturity of the wider market relative to their own position. In practice, the majority of respondents find themselves at a comparable stage of adoption, indicating that the competitive pressure felt around AI readiness may be more perceived than real.

Rujul Zarpade

CEO and Co-founder, Zip

“ The future of procurement belongs to organisations that see AI not as a risk to manage, but as a capability to build responsibly into every step, starting with procurement orchestration. Governed AI makes that possible, giving businesses the confidence to move faster while keeping every decision fully accountable.

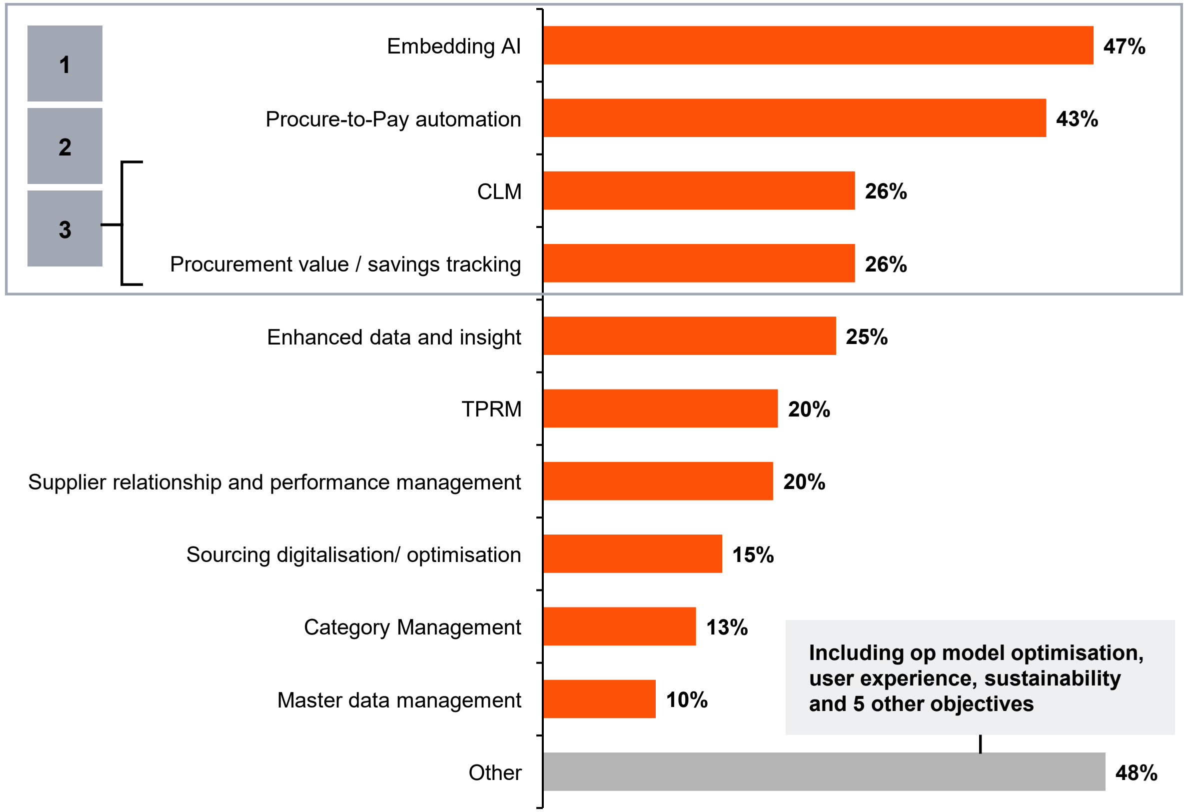
03

Roadmap to transformation

Priority areas of focus for digital procurement

AI has shown up as the top focus for procurement functions to invest in over the next 3 years

Key focus areas over the next 3 years within digital procurement



PwC Global Digital Procurement Survey, 6th edition. Question: Over the next 3 years, what are the priority areas of focus for digital procurement?

*** %'s based on complete answers**

AI as the dominant investment priority

Embedding AI ranks as the top priority at 47%, confirming that artificial intelligence has rapidly shifted from a nascent concept to a core strategic investment for procurement functions.

This mirrors the wider market where generative AI is being deployed across spend analytics, demand forecasting, and supplier risk scoring, with organisations treating it as a competitive necessity rather than a discretionary innovation.

Automation and process efficiency remain central

Procure-to-Pay automation follows closely at 43%, demonstrating that end-to-end transactional efficiency remains a fundamental concern despite years of ERP and source-to-pay investment.

The sustained high ranking suggests many organisations still face fragmented processes and poor user adoption, recognising that foundational automation must be mature before more advanced digital capabilities can deliver full value.

Contract lifecycle management and data-driven value tracking as joint third priorities

CLM and Procurement value/savings tracking are jointly ranked third at 26%, with enhanced data and insight closely behind at 25%, forming a cluster of priorities centered on visibility and value realisation.

This reflects a maturing market moving beyond cost savings as the sole metric, seeking to demonstrate broader value through contract governance, real-time tracking, and richer data ecosystems – capabilities that also serve as critical enablers for the AI and automation investments above.

Greg Harbor
Chief Partner Office, Coupa

> "This year, agentic AI is proving to be the defining capability for automation, autonomous action, and ultimately, creating efficiency and value in the entire source-to-pay (S2P) flow. Leveraging $10T in transactional data, Coupa Navi agents and Compose are empowering businesses to turn procurement into a true engine for growth.

Target improvement

As well as specific drivers, clear targets to grow digital tool capabilities can be seen as an enabler for success

Current maturity remains low across all process areas

The survey data reveals that digital procurement maturity in 2026 sits at notably modest levels – 30% for Source-to-Contract (S2C), 28% for Supplier Management, and 41% for Procure-to-Pay (P2P). This is broadly consistent with the wider market picture, where many organisations have invested in point solutions or pilot programmes but have yet to embed digital tools end-to-end across procurement workflows, leaving significant capability gaps in upstream and strategic sourcing activities in particular.

P2P leads today but the ambition gap is largest upstream

P2P processes already hold the highest maturity at 41% and target 71% in three years, yet the planned uplift of +30 percentage points is actually the smallest of the three categories. By contrast, Supplier Management – the least mature area at 28% – shows the greatest planned improvement at +37 percentage points, suggesting respondents recognise that supplier data, risk monitoring and relationship management are among the most pressing digital investment priorities for the near term.

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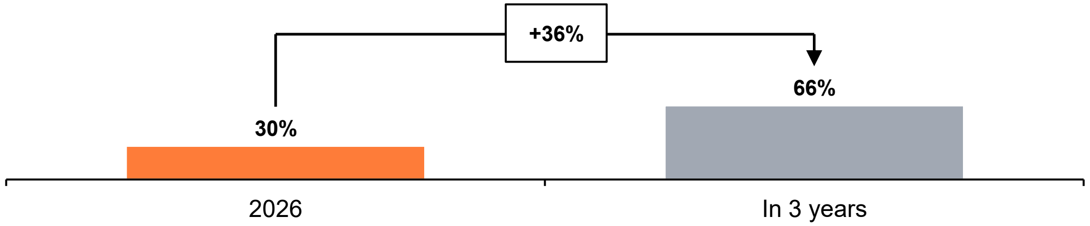
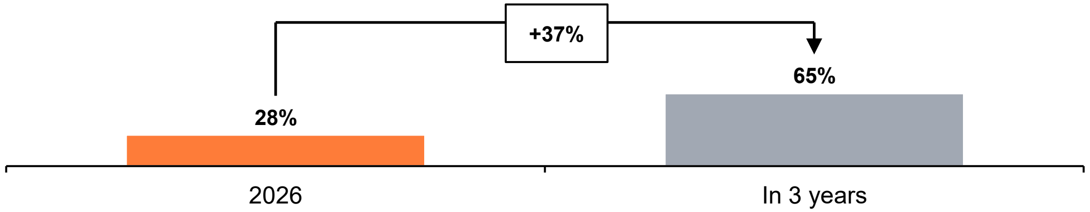
Convergence around a c.65–71% target signals a market-wide 'next frontier'

All three process areas converge on a target maturity band of roughly 65–71%, effectively aiming to more than double current S2C and Supplier Management scores within three years. This level of ambition reflects the growing influence of AI-enabled analytics, integrated suites (e.g. SAP Ariba, Coupa, Ivalua) and generative AI use cases that are reshaping what 'good' looks like in digital procurement – though achieving these targets will require significant change management, data quality improvements and cross-functional alignment that many organisations still underestimate.

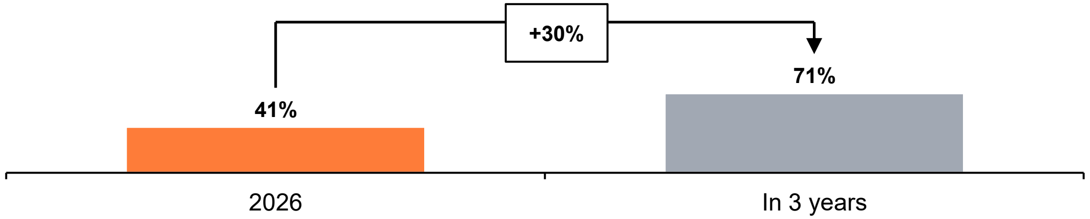
Maturity of S2C processes vs 3-year target state (weighted average by grouping %)



Maturity of supplier management processes vs 3-year target state (weighted average by grouping %)



Maturity of P2P processes vs 3-year target state (weighted average by grouping %)



PwC Global Digital Procurement Survey, 6th edition. Questions: 1. What is the current degree of maturity of the S2C/supplier management/P2P process digitalisation? 2. In 3 years, what will be the targeted level of process digitalisation across – S2C, supplier management, P2P.

*** %'s based on complete answers**

Success factors for transformation

To enable change, businesses recognise the importance of internal management for embedding successfully

Key success factors for the deployment of a digital procurement solution

56%	Cross-business engagement (ie. legal, finance, tech…)	New
52%	Clear definition of requirements and functional processes	-1
39%	Change management after go-live (communication, training…)	=
36%	Sponsorship and Senior/Executive level engagement	-2
34%	Vendor selection (software)	=
28%	Clear understanding of the current state	New
23%	Clarity regarding and adherence to budget	New
10%	Integrator/external project management support	-4

Business transformation

Stakeholder and cross-functional engagement

- Cross-business engagement with Legal, Finance, and Technology teams ranks as the highest success factor (56%), underscoring the importance of breaking down silos during digital transformation.
- Executive sponsorship and senior-level engagement (36%) remains a key enabler, providing the governance and authority needed to drive organisational change.

Process clarity and change management

- Clear definition of requirements and functional processes (52%) is the second most critical factor, emphasising that successful implementations start with well-documented needs.
- Change management after go-live (39%) highlights that deployment success extends well beyond the technical launch, requiring ongoing communication and training.

Technical and vendor considerations

- Technical aspects such as vendor selection (34%), current state understanding (28%), budget adherence (23%), and external integrator support (10%) are viewed as secondary to business-oriented criteria.
- This indicates that companies recognise transformation as primarily a business challenge, with technology as an enabler rather than the driver.

PwC Global Digital Procurement Survey, 6th edition. Question: In your opinion, what are the key success factors in digital transformations for Procurement (please select 3 choices).

*** %'s based on complete answers**

External support and investment

With high levels of investment, success is key and we can see where external support can deliver this best

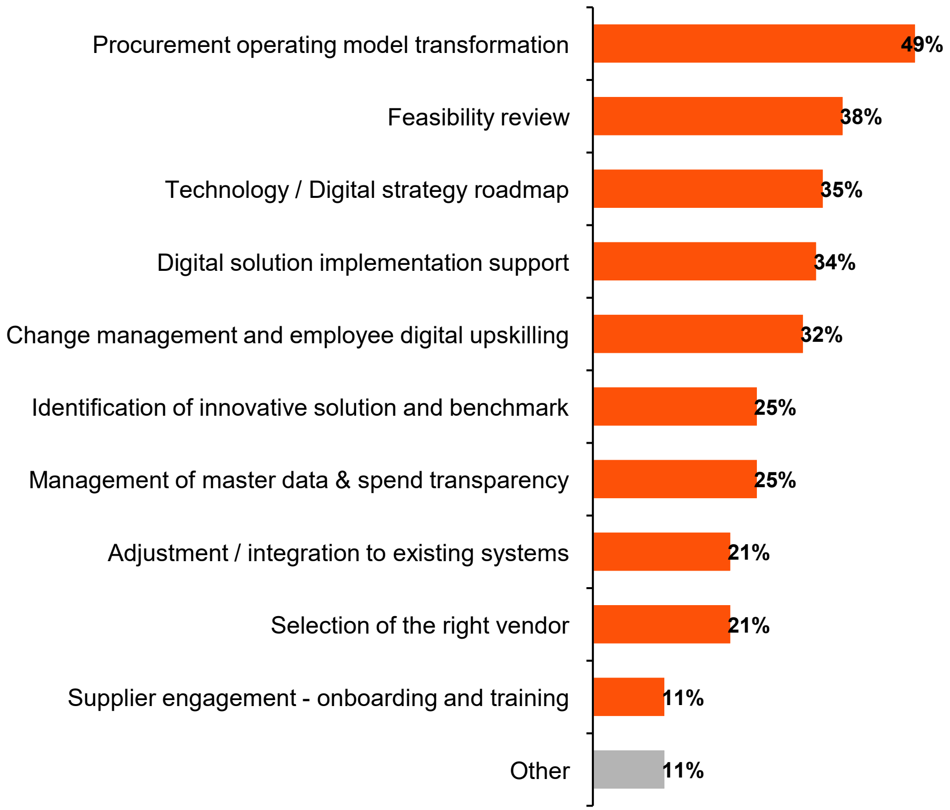
Investment appetite and market commitment

- We can see strong budget commitment across the market with <60% of respondents planning to invest USD 0.5 million or more in digital procurement over the next three years, with over a fifth targeting spend above USD 3 million.
- Many organisations are still building the business case. A quarter (25.1%) have unknown budgets, pointing to early-stage planning and a significant advisory opportunity.

Key areas of external support and strategic implications

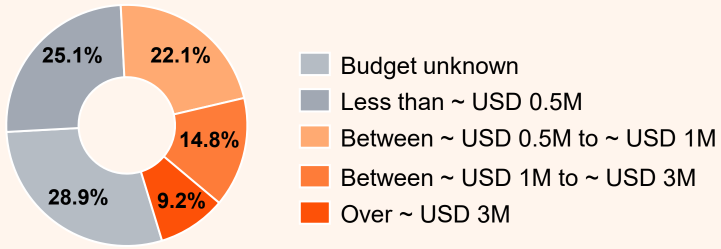
- Operating model transformation leads the need for external support by a wide margin. At 49%, it is nearly double the next use case, signalling that businesses see process and governance redesign—not just technology—as the core challenge.
- Strategy and feasibility are in high demand. Feasibility reviews (38%) and digital strategy roadmaps (35%) show many firms still need help defining scope and priorities before committing to implementation.
- Implementation and change management remain key barriers. Solution implementation support (34%) and employee upskilling (32%) reflect persistent internal capability gaps that drive reliance on external partners.
- Downstream activities are under-prioritised. Supplier engagement (11%) and vendor selection (21%) score lower yet are foundational to realising long-term value and risk being overlooked.
- Advisory-led support trumps pure technology provision. The top five use cases are all capability- and strategy-oriented, favouring firms offering end-to-end transformation services.

Top use cases for leveraging external support



PwC Global Digital Procurement Survey, 6th edition. Question: Where do you expect the greatest benefit from external support in digital procurement transformation?

Expected investment level to digital procurement over the next 3 years



PwC Global Digital Procurement Survey, 6th edition. Question: In 3 years, what will be your annualised investment level (incl. license and implementation costs), dedicated to your procurement digital transformation?

*** %'s based on complete answers**

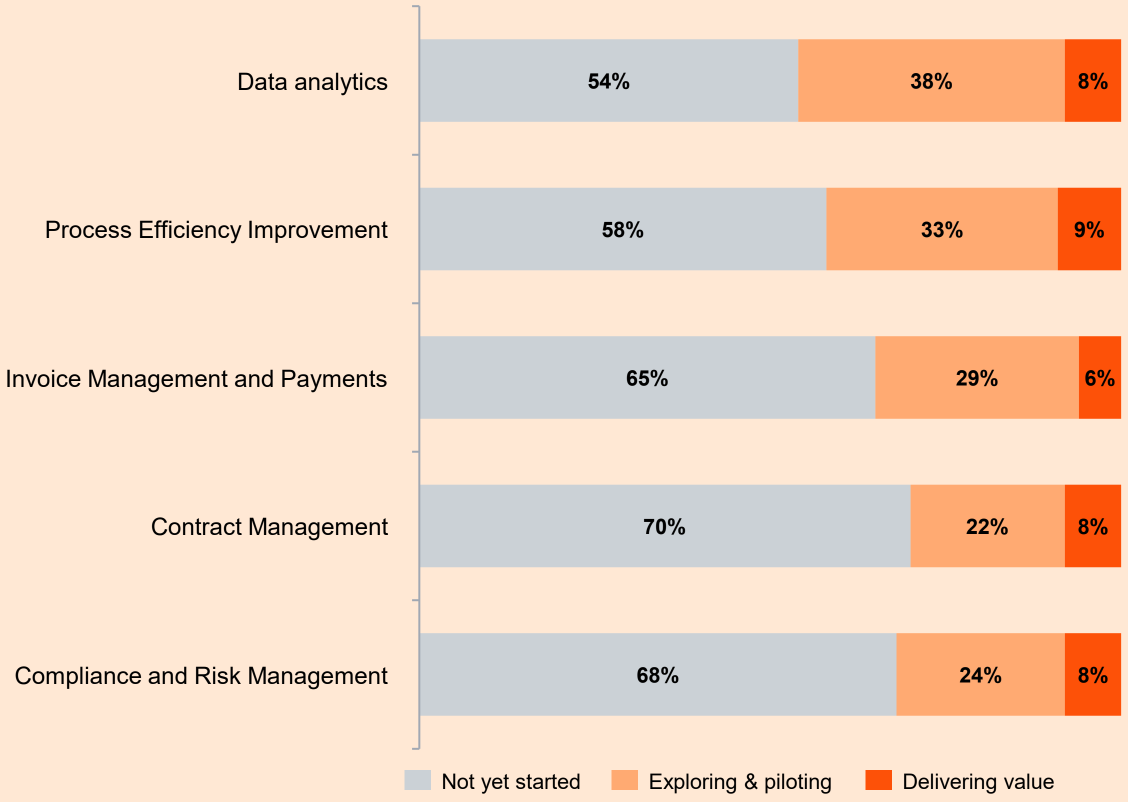
04

Key themes deep dives

AI deep dive

Appetite for AI is broad across use cases, but adoption is slow – data and process efficiency lead the way

Where are we in our AI adoption journey in relation to key use cases?



PwC Global Digital Procurement Survey, 6th edition. Question: Where in the AI adoption journey is your procurement organisation across the following parameters – data analytics, process efficiency improvement, invoice management and payments, contract management, compliance and risk management?

*** %'s based on complete answers**

Top use cases

Whilst most procurement functions are early in their adoption of AI, clear use cases are emerging to drive success

Intake and Orchestration

AI routes request to the right process, supplier, and approvals to improve efficiency.

Automated Spend Analysis

AI cleans and classifies spend data to inform category strategies.

Intelligent Sourcing

AI supports market research, RFx development, and bid scenario analysis.

Contract Intelligence

AI reviews/drafts contracts, ensures standard terms are met.

Franck Lheureux

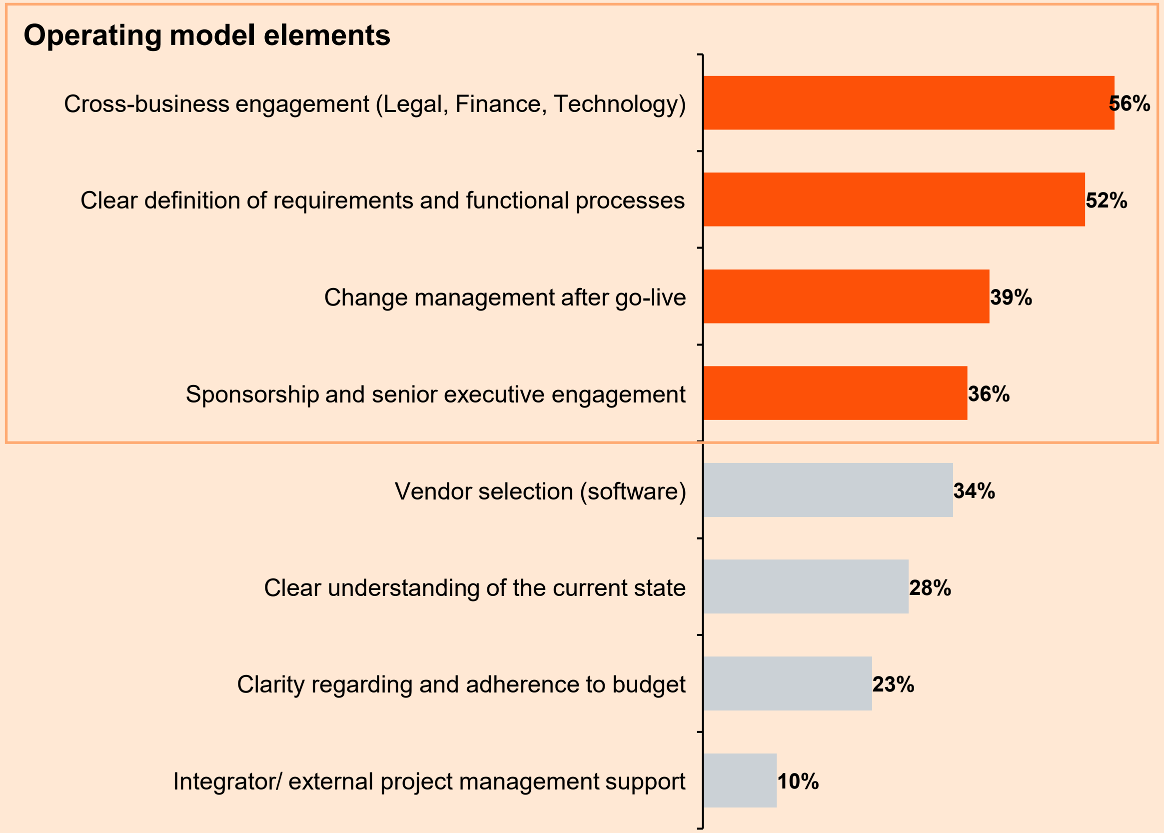
CEO, Ivalua

> We stand at the threshold of a new era in procurement. Agentic AI is not simply going to improve operational efficiency but fundamentally change how procurement works and multiply its impact on the business.

Operating model deep dive

Successful transformation is an operating model and people challenge – organisational enablers rank far above technical ones

Key success factors for deploying a digital procurement solution



PwC Global Digital Procurement Survey, 6th edition. Question: In your view, what are the key success factors in procurement digital transformation?

*** %'s based on complete answers**

Key insights

Cross-business engagement

Engagement with Legal, Finance, Technology and other key functions is the top ranked success factor (56%), underscoring the need to break down functional silos.

Design clarity

Clearly defined requirements and functional processes (52%) shows that redesigning how procurement operates must precede tool deployment.

People and governance

Change management after go-live (39%) outranks technical factors, outlining the importance of change management in ensuring user adoption and transformation success.

Executive sponsorship and engagement

Executive sponsorship and engagement is key for setting the strategic direction, prioritisation of goals, and steering the organisation through complex transformations.

Lucy Harding

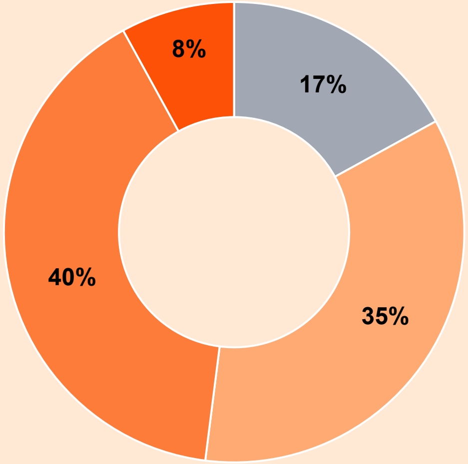
Partner and Global Head of Procurement and Supply Chain Practice, Odgers

> The AI revolution gives procurement leaders and their teams the opportunity to be more human. Finally freed from the administrative tasks that have been a blocker to the capacity required to focus on value added activity. Procurement teams will now have the time to engage earlier and in a more in-depth way, augmented and accelerated by the insights and process wins AI can provide, not replaced by AI.

Enabling growth deep dive

Deeper supplier collaboration is procurement's next lever for innovation and growth – but few have realised it

Maturity of collaborative digital tools with suppliers or across the procurement ecosystem



- Do not (yet) recognise the added value
- Partial platform deployment
- Opportunity identified but no visible solution
- Mature, full-ecosystem platform

PwC Global Digital Procurement Survey, 6th edition. Question: What is the current maturity of the collaborative digital tools with suppliers and across the procurement ecosystem?

*** %'s based on complete answers**

Key insights

Supplier ecosystem collaboration is an emerging growth lever

Digital collaboration with suppliers on product development, innovation, quality and risk moved procurement beyond a cost control function to that of holistic value creation.

Deployment is still partial

Around 40% have deployed collaboration platforms with one or several suppliers, but largely limited to procurement topics rather than full ecosystem.

A large untapped opportunity remains

About 35% of the survey respondents recognise the opportunity but cannot find a solution that meets their requirements – a significant platform gap.

Full-ecosystem maturity is rare (~8%)

Few have extended collaboration tools to multi-functional teams and business partners; those that do are besxt placed to co-innovate and capture growth.

Jesse Lee

CEO, Brooklyn Solutions

"The procurement leaders who deliver maximum value for money – and that demonstrably enable and accelerate their business's strategic roadmap – are those who bring a holistic, policy-driven, and digitally rigorous approach across the entire supplier lifecycle. They are excited about AI, yet they are grounded enough to know that demonstrable control and clean, connected data atop a proper architecture are what turn procurement capability into enterprise resilience.

05

Sector summary

Aeronautics, defense and security

Complex single-source supply chains and strict export-control regimes make supplier risk visibility critical. AI-enabled procurement helps CPOs anticipate programme delays and geopolitical disruption before they spread through the supply base.

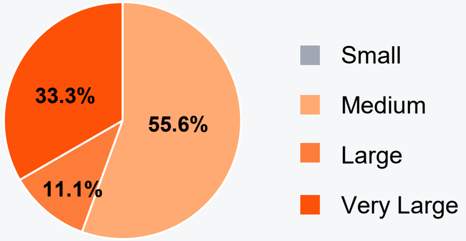
Aeronautics, defense and security

18 respondents

- 78% of respondents cite efficiency and simplicity as a driver, the most-cited in the sector (14 of 18).
- Digitalisation maturity is low; 39% of both source-to-contract and supplier management processes sit at "Very Low," and fewer than 15% reach "Strong" or above.
- The sector is concentrated in medium-sized companies (56%), with very large enterprises a further 33%.
- Cross-business engagement is the top-ranked success factor; clear understanding of the current state ranks 2nd in the sector versus 6th overall.

Current state

Size of company



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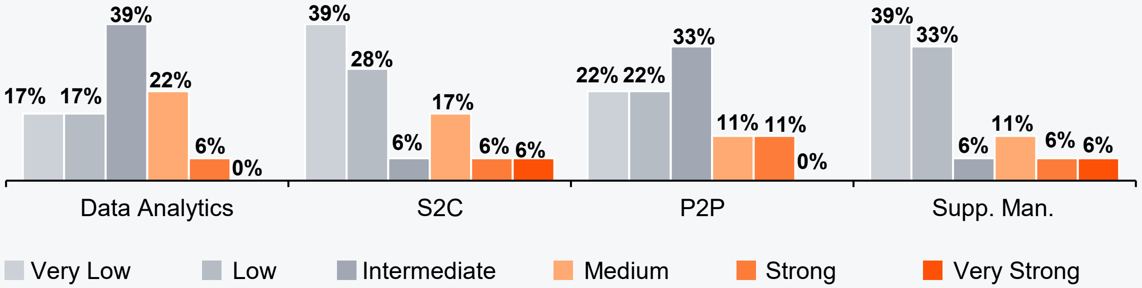
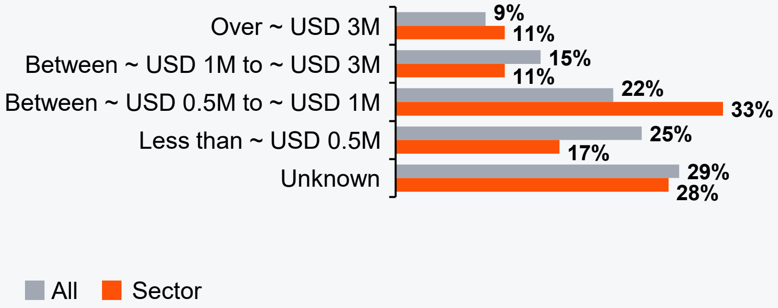


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Clear understanding of the current state	1	2	-1
Cross-business engagement	2	6	-5
Vendor selection (software)	3	1	-

Top drivers for digital transformation

Efficiency and simplicity
14 responses

Crisis/risk management
5 responses

AI enablement
5 responses

* %'s based on complete answers

Agri-Food

Volatile commodities, climate risks, tightening traceability and sustainability rules, and a fragmented supplier base make digitisation essential for end-to-end traceability and predictive demand and yield forecasting.

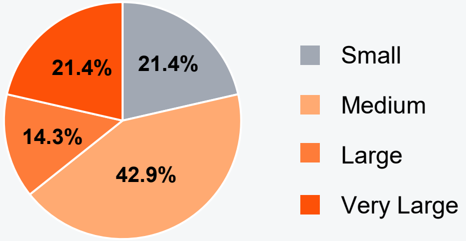
Agri-Food

14 respondents

- 71% cite efficiency and simplicity and 57% cite procurement savings (10 and 8 of 14).
- 43% expect to invest less than USD 0.5M over the next three years, well above the 25% survey average, and none expect to invest over USD 3M.
- The sector is weighted toward medium-sized (43%) and small (22%) companies.
- Cross-business engagement and clear definition of requirements are the top two success factors, matching the overall survey.

Current state

Size of company



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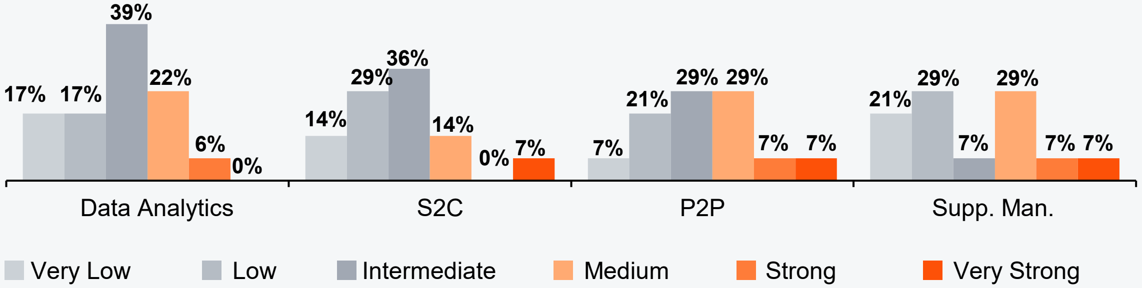
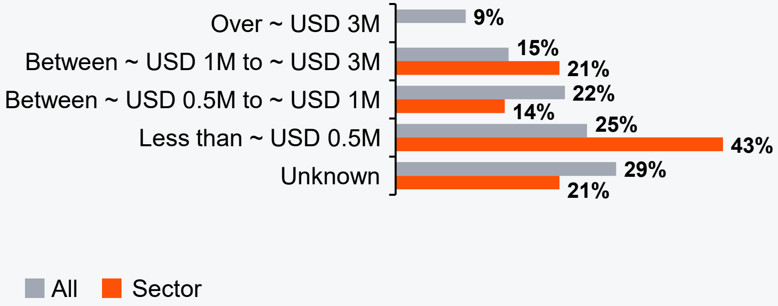


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	3	+1
Sponsorship and Senior/Executive level engagement	3	4	+1

Top drivers for digital transformation

Efficiency and simplicity

10 responses

Procurement Savings

8 responses

Process transparency, traceability and fairness

4 responses

* %'s based on complete answers

Automotive

EV transition, semiconductor shortages and just-in-time exposure reveal fragile tier-1/2/3 networks. Digital and AI-led procurement provide the risk sensing and supplier visibility needed to keep production moving.

Automotive

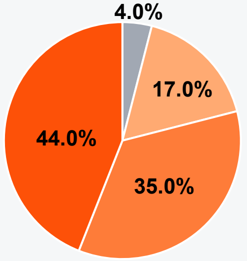
23 respondents

- 78% cite efficiency and simplicity and 61% cite procurement savings, making it one of the most savings-focused sectors (18 and 14 of 23).
- The sector is dominated by large and very large companies (79% combined), reflecting the scale of OEMs and Tier 1 suppliers.
- Investment is spread fairly evenly, with 26% expecting USD 1M to USD 3M and a further 26% expecting USD 0.5M to USD 1M.
- Clear definition of requirements is the top-ranked success factor, while cross-business engagement (the overall #1) falls to 5th.

* %'s based on complete answers

Current state

Size of company



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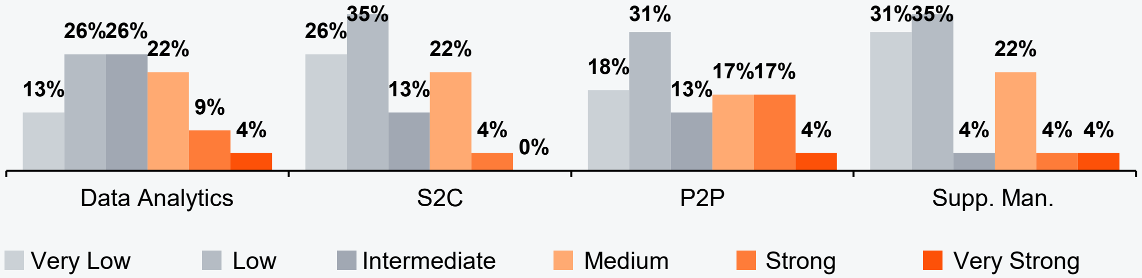
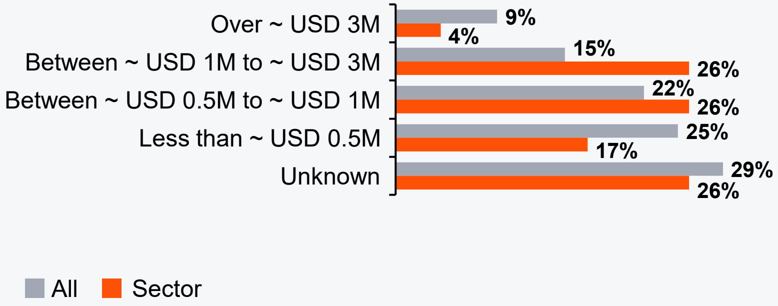


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Clear definition of requirements and functional processes	1	2	+1
Sponsorship and Senior/Executive level engagement	2	4	+2
Change management after go-live (communication – training etc.)	3	3	-

Top drivers for digital transformation

Efficiency and simplicity
18 responses

Procurement Savings
14 responses

Process transparency, traceability and fairness
6 responses

Banking, insurance and financial services

Rising third-party risk scrutiny and high IT and professional services spend make procurement digitisation key to vendor risk, contract compliance and margin protection.

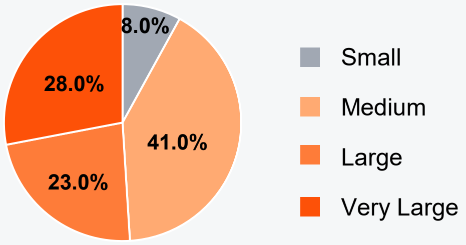
Banking, insurance and financial services

62 respondents

- The largest respondent group in the survey; 74% cite efficiency and simplicity and 44% cite procurement savings (46 and 27 of 62).
- 18% of respondents expect to invest over USD 3M, double the 9% survey average and among the highest of any sector .
- Company size is broad-based, led by medium-sized firms (41%), with very large enterprises a further 28%.
- Cross-business engagement and clear definition of requirements are the top two success factors, matching the overall survey.

Current state

Size of company



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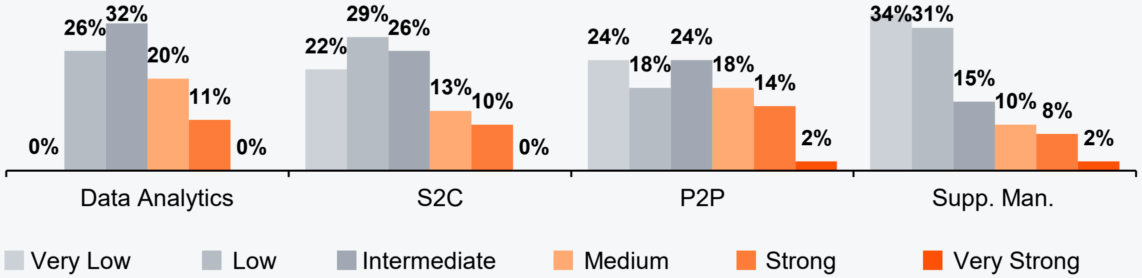
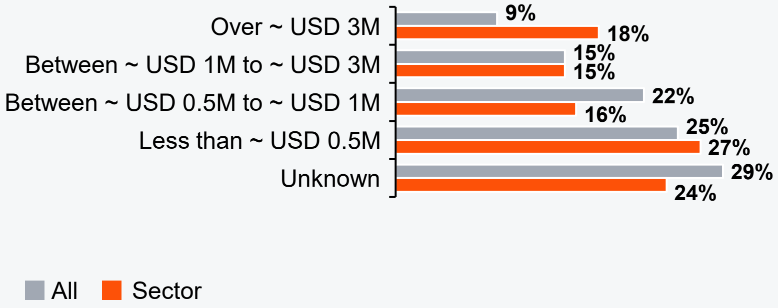


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Sponsorship and Senior/Executive level engagement	3	4	+1

Top drivers for digital transformation

Efficiency and simplicity

46 responses

Procurement Savings

27 responses

Process transparency, traceability and fairness

15 responses

* %'s based on complete answers

Building and infrastructure

Fragmented subcontractors, cost overruns and material price volatility make digitised procurement and AI forecasting critical to protect margins and de-risk supplier prequalification.

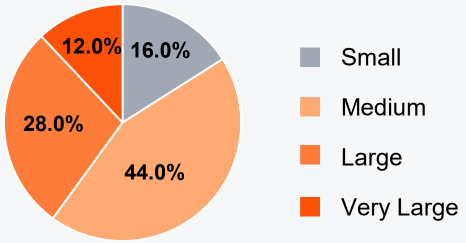
Building and infrastructure

25 respondents

- 68% cite efficiency and simplicity, followed by procurement savings (48%) and AI enablement (32%), with AI more prominent than in most sectors (17, 12 and 8 of 25).
- Investment sits at the lower end; 32% do not know their future budget and a further 28% expect to invest less than USD 0.5M.
- Source-to-contract maturity is weak, with 40% of respondents at "Very Low" or "Low“.
- The sector is led by medium-sized companies (44%), with relatively few very large enterprises (12%).

Current state

Size of company



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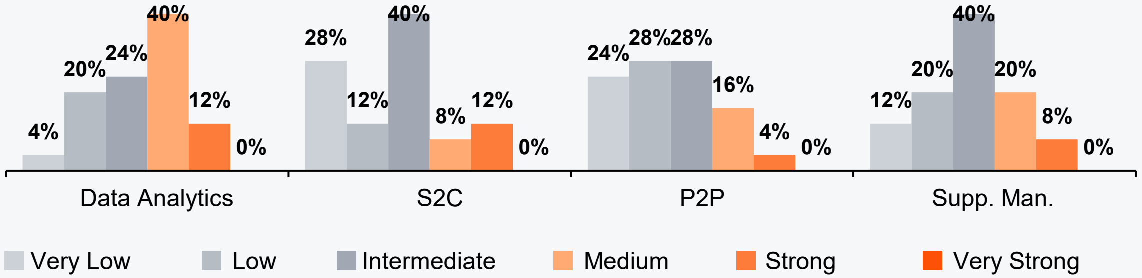
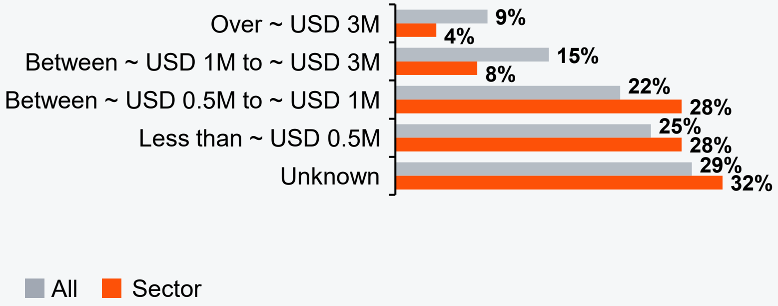


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Vendor selection (software)	2	5	-5
Clear definition of requirements and functional processes	3	2	-1

Top drivers for digital transformation

Efficiency and simplicity
17 responses

Procurement Savings
12 responses

AI enablement
8 responses

* %'s based on complete answers

Consumer goods

Changing consumer preferences, SKU growth and raw material swings require digital procurement to improve sourcing agility, protect margins and move beyond back-office cost control.

Consumer goods

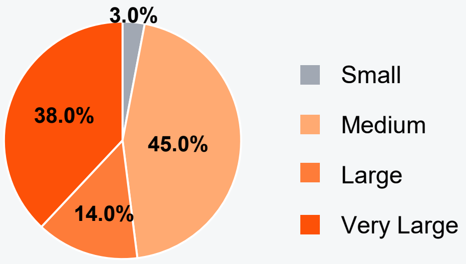
30 respondents

- 70% cite efficiency and simplicity, followed by procurement savings (40%) and process transparency (37%) (21, 12 and 11 of 30).
- 37% do not know their future investment level, among the highest uncertainty rates in the survey.
- Purchase-to-pay is the most digitally mature process area, with only 11% of respondents at "Very Low" or "Low".
- The sector is led by medium-sized (45%) and very large (38%) companies.

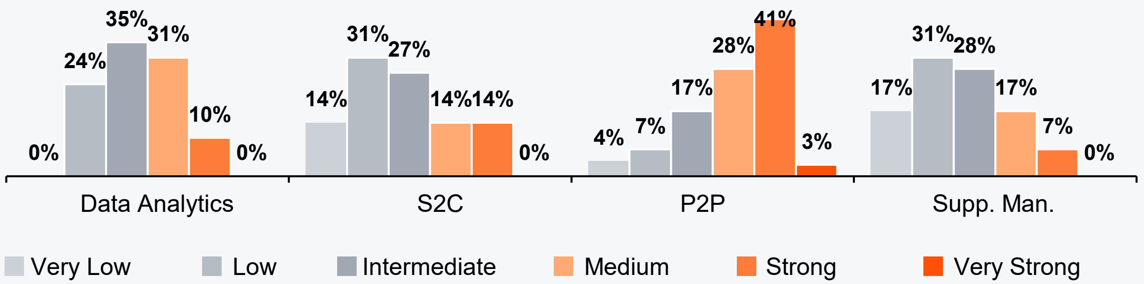
* %'s based on complete answers

Current state

Size of company

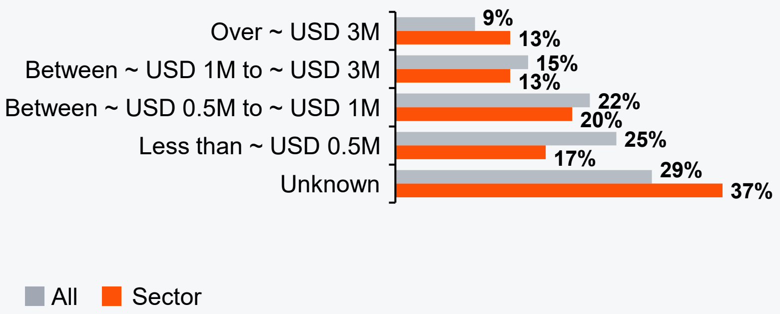


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Change management after go-live	2	3	+1
Clear understanding of the current state	3	6	+3

Top drivers for digital transformation

Efficiency and simplicity
21 responses

Procurement Savings
12 responses

Process transparency, traceability and fairness
11 responses

Distribution and retail

Thin margins and speed-to-shelf pressures make digitised, inventory-linked procurement vital for managing seasonal demand spikes and total cost-to-serve.

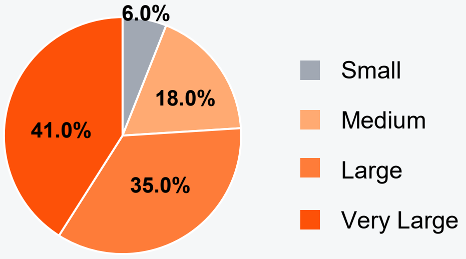
Distribution and retail

17 respondents

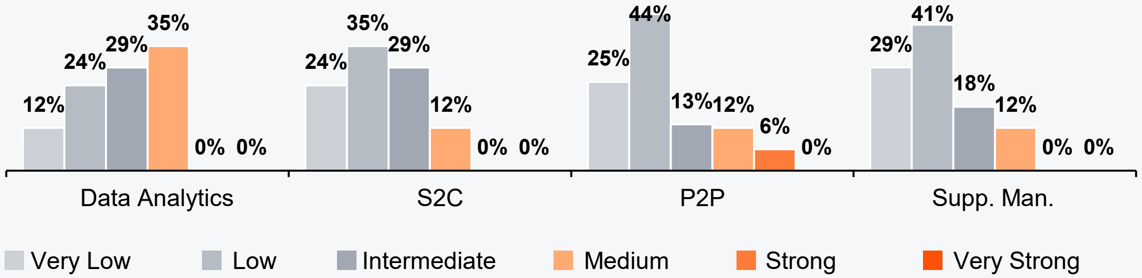
- 76% cite efficiency and simplicity and 53% cite procurement savings (13 and 9 of 17).
- Investment is polarised; 18% plan over USD 3M (double the survey average) while 35% plan less than USD 0.5M
- Source-to-contract maturity is weak, with 59% of respondents at "Very Low" or "Low".
- Cross-business engagement is the top-ranked success factor, while sponsorship and senior engagement rises to 2nd versus 4th overall.

Current state

Size of company

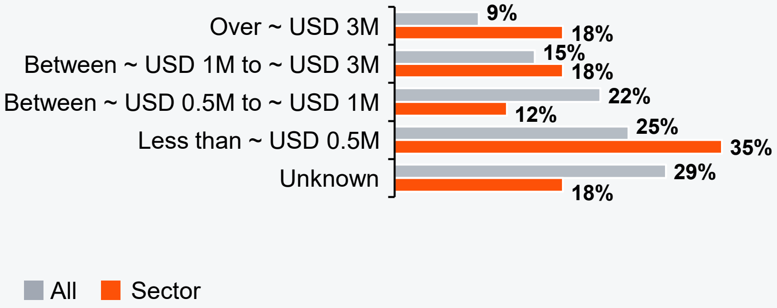


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Sponsorship and Senior/Executive level engagement	2	4	+2
Clear definition of requirements and functional processes	3	2	-1

Top drivers for digital transformation

Efficiency and simplicity
13 responses

Procurement Savings
9 responses

AI enablement
6 responses

* %'s based on complete answers

Education

Tight budgets, decentralised buying and reliance on ed-tech vendors make procurement digitisation essential for cost transparency, compliance and value-for-money accountability.

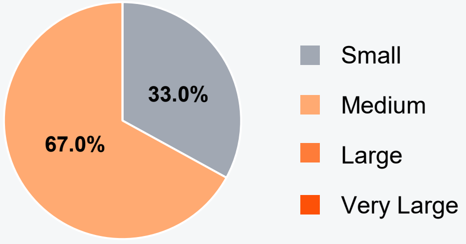
Education

3 respondents

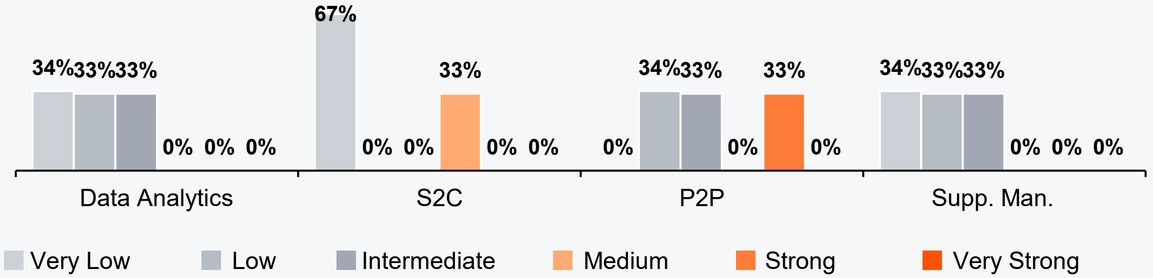
- Very small sample (3 respondents), so findings are indicative only.
- Efficiency and simplicity and process transparency are the joint most-cited drivers, each selected by 2 of the 3 respondents.
- Two-thirds (67%) expect to invest less than USD 0.5M, and none expect to invest above USD 1M.
- All respondents are small or medium-sized companies.

Current state

Size of company

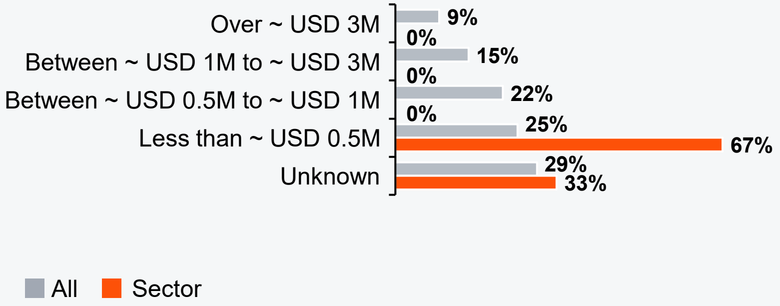


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Vendor selection (software)	1	5	+4
Clear understanding of the current state	2	6	+4
Cross-business engagement	3	7	+4

Top drivers for digital transformation

Efficiency and simplicity
2 responses

Process transparency, traceability and fairness
2 responses

Procurement Savings
1 responses

* %'s based on complete answers

Energy, utilities and natural resources

Capital-intensive assets and demand for transition materials make procurement digitisation essential for capex efficiency and supply continuity through the energy transition.

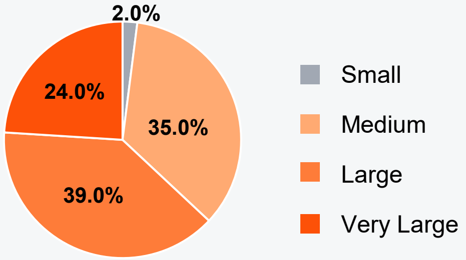
Energy, utilities and natural resources

51 respondents

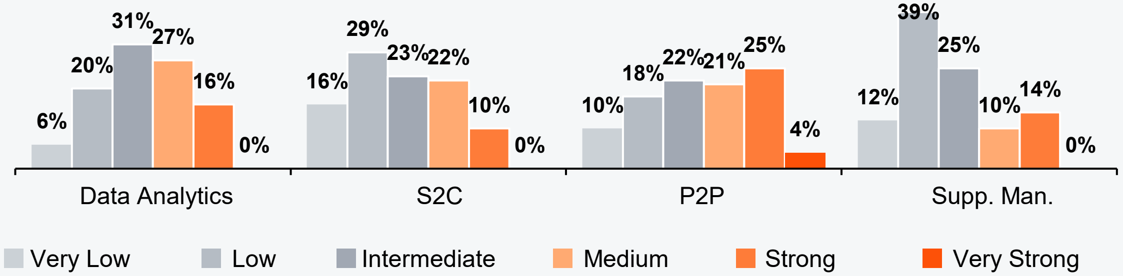
- 76% cite efficiency and simplicity and 47% cite procurement savings (39 and 24 of 51).
- Investment is modest; only 4% expect to invest over USD 3M, well below the 9% survey average.
- Data analytics is the most digitally mature process area, with 16% of respondents at "Strong" or above.
- Clear definition of requirements is the top-ranked success factor, just ahead of cross-business engagement (the overall #1).

Current state

Size of company

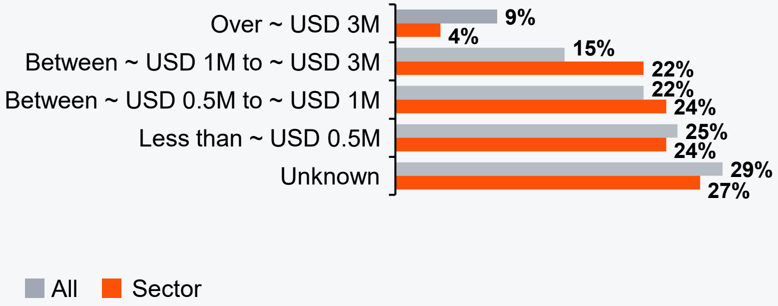


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Clear definition of requirements and functional processes	1	2	+1
Cross-business engagement	2	1	-1
Cross-business engagement	3	3	-

Top drivers for digital transformation

Efficiency and simplicity

13 responses

Procurement Savings

9 responses

Process transparency, traceability and fairness

11 responses

* %'s based on complete answers

Entertainment, communications and media

Complex licensing, royalties and fast-moving tech spend require agile digital vendor management to match content cycles and platform economics.

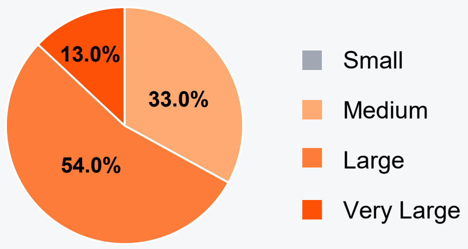
Entertainment, communications and media

15 respondents

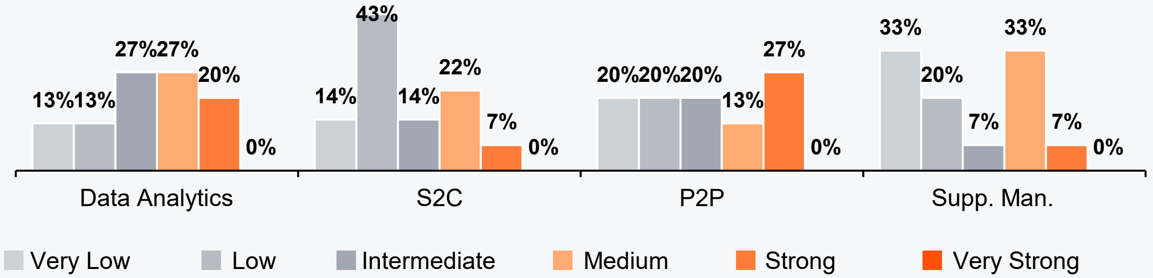
- 73% cite efficiency and simplicity and 47% cite procurement savings (11 and 7 of 15).
- 40% expect to invest USD 0.5M to USD 1M, nearly double the 22% survey average.
- Source-to-contract is the least mature process area, with 43% of respondents at "Low" and a further 14% at "Very Low“.
- The sector is dominated by large companies (54%), unusual among the sectors surveyed.

Current state

Size of company

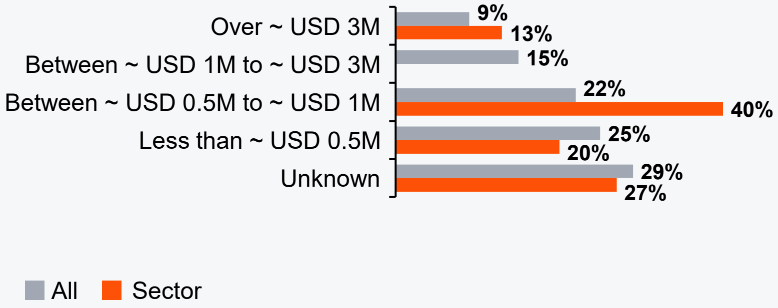


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	1
Vendor selection (software)	2	5	+3
Clarity regarding, and adherence to budget	3	7	+4

Top drivers for digital transformation

Efficiency and simplicity

11 responses

Procurement Savings

7 responses

Process transparency, traceability and fairness

4 responses

* %’s based on complete answers

Healthcare and pharmaceuticals

Regulatory complexity (GMP and quality compliance), drug shortage risk, and the direct link between supply continuity and patient safety mean digitised procurement is not an efficiency play but a clinical and compliance imperative.

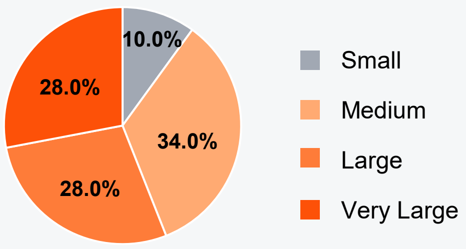
Healthcare and pharmaceuticals

32 respondents

- 84% cite efficiency and simplicity, the highest proportion of any sector (27 of 32).
- 47% do not know their future investment level, the highest of any sector other than Private Equity, pointing to budget uncertainty.
- Supplier management is the least mature process, with 45% of respondents at "Very Low“.
- Cross-business engagement and clear definition of requirements are the top two success factors, matching the overall survey.

Current state

Size of company



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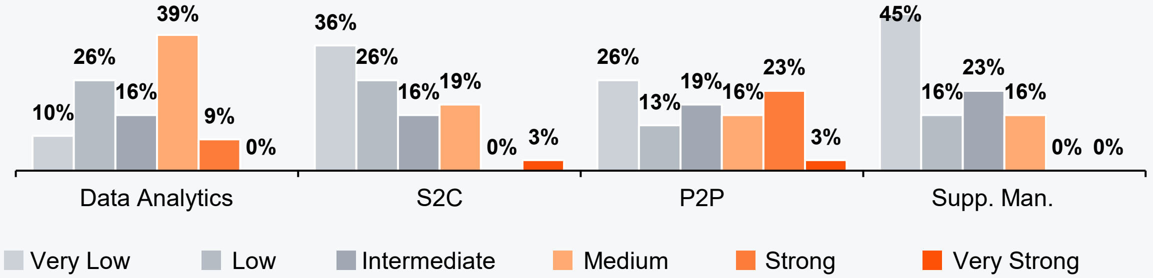
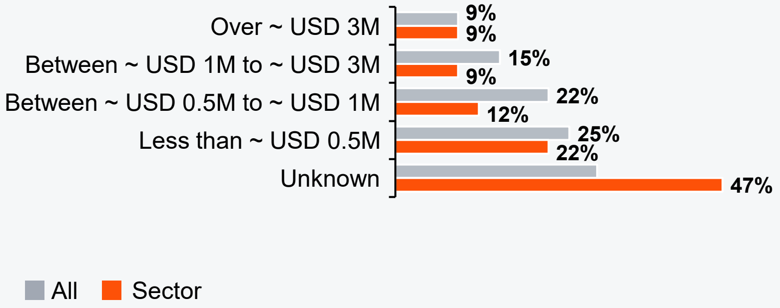


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Change management after go-live	3	3	-

Top drivers for digital transformation

Efficiency and simplicity
27 responses

Procurement Savings
17 responses

Process transparency, traceability and fairness
7 responses

* %'s based on complete answers

Manufacturing

Global, multi-tier supply networks under pressure from cost volatility and reshoring/nearshoring trends mean digitisation is central to building the resilience and cost control that traditional, manually managed supply chains cannot provide.

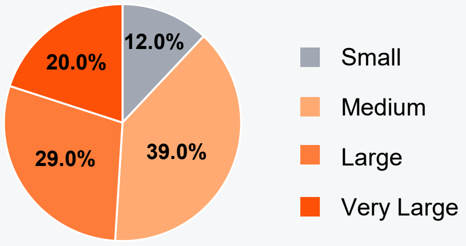
Manufacturing

51 respondents

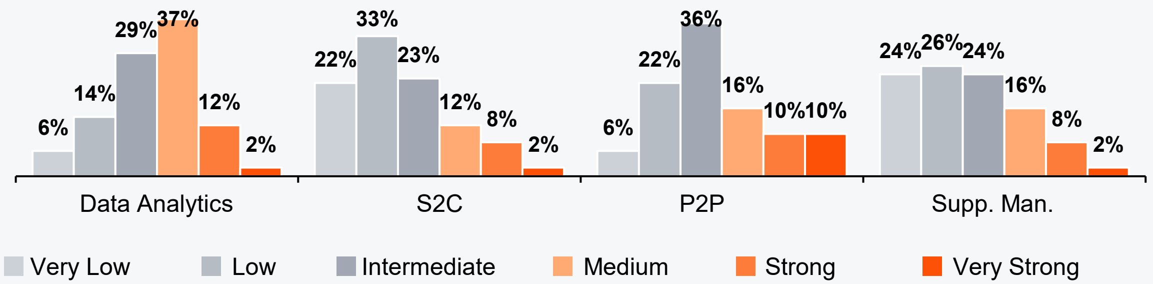
- 76% cite efficiency and simplicity and 45% cite procurement savings (39 and 23 of 51).
- 35% expect to invest less than USD 0.5M, above the 25% survey average, reflecting the large number of mid-sized firms.
- Data analytics is the most mature process area, with 37% of respondents at "Medium“.
- Cross-business engagement and clear definition of requirements are the top two success factors, matching the overall survey.

Current state

Size of company

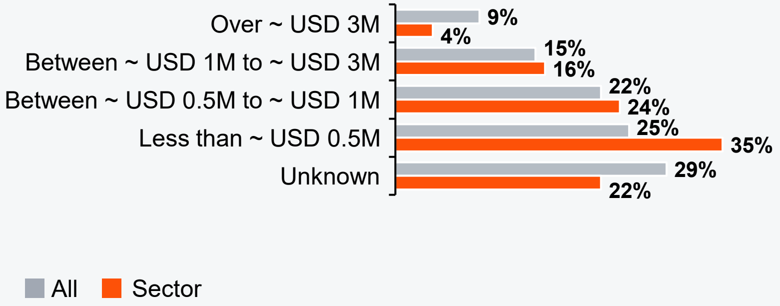


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Vendor selection (software)	3	5	+2

Top drivers for digital transformation

Efficiency and simplicity
39 responses

Procurement Savings
23 responses

Process transparency, traceability and fairness
11 responses

* %’s based on complete answers

Professional services

Spend dominated by people and subcontracted expertise, combined with highly decentralised buying behaviour, leaves most firms with little visibility into indirect spend. Digitisation is the lever that brings this "hidden" spend under control.

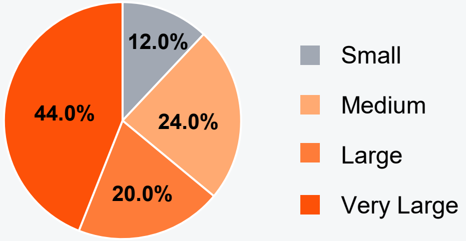
Professional services

25 respondents

- 68% cite efficiency and simplicity and 48% cite procurement savings (17 and 12 of 25).
- 40% expect to invest less than USD 0.5M, above the 25% survey average.
- Purchase-to-pay is the most mature process area, with 24% of respondents at "Strong" or above.
- Cross-business engagement and clear definition of requirements are the top two success factors, matching the overall survey.

Current state

Size of company



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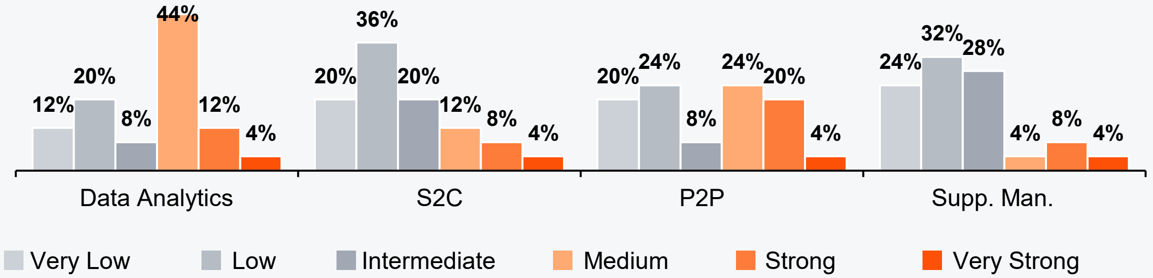
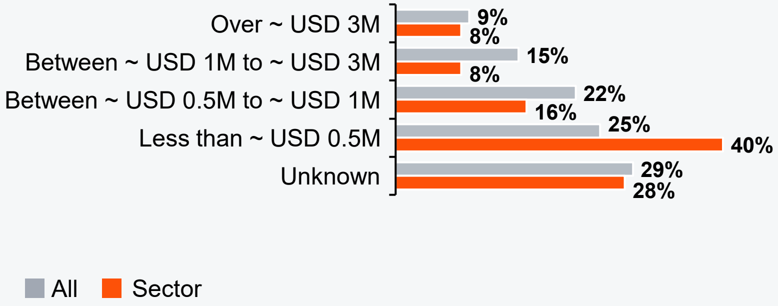


Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Change management after go-live	3	3	-

Top drivers for digital transformation

Efficiency and simplicity
17 responses

Procurement Savings
12 responses

Compliance and regulatory
7 responses

* %'s based on complete answers

Technology, software, hardware and telecoms

Rapid innovation cycles, component shortages, and sprawling software/cloud subscription estates create a level of vendor complexity that only digitised, AI-assisted procurement can manage effectively, particularly around licence optimisation and cost governance.

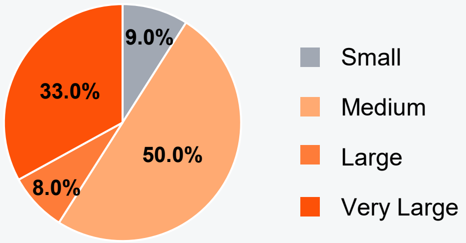
Technology, software, hardware and telecoms

25 respondents

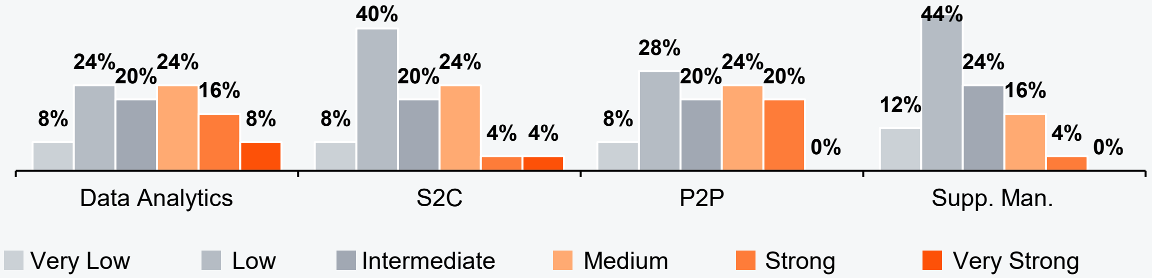
- 80% cite efficiency and simplicity, followed by procurement savings (48%) and AI enablement (32%) (20, 12 and 8 of 25).
- 32% expect to invest USD 1M to USD 3M, the highest concentration in that bracket of any sector and well above the 15% average.
- The sector is led by medium-sized companies (50%), with a further 33% very large.
- Supplier management is the least mature process area, with 56% of respondents at "Very Low" or "Low".

Current state

Size of company

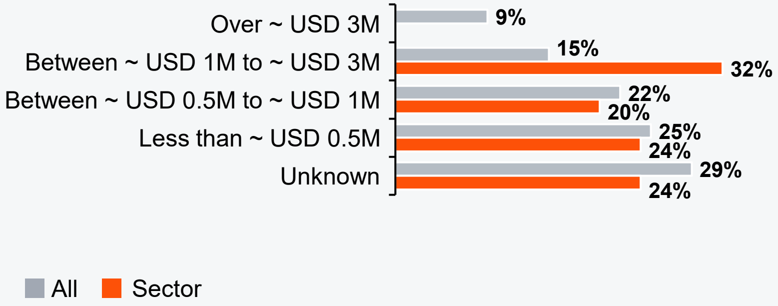


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Vendor selection (software)	2	5	+3
Sponsorship and Senior/Executive level engagement	3	4	+1

Top drivers for digital transformation

Efficiency and simplicity
20 responses

Procurement Savings
12 responses

AI enablement
8 responses

* %'s based on complete answers

Transportation and logistics

Fuel price volatility, capacity constraints, and complex multimodal networks make real-time visibility non-negotiable. Digitised procurement enables the dynamic sourcing and cost management needed to protect service levels and margins simultaneously.

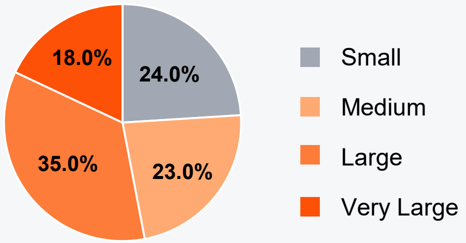
Transportation and logistics

17 respondents

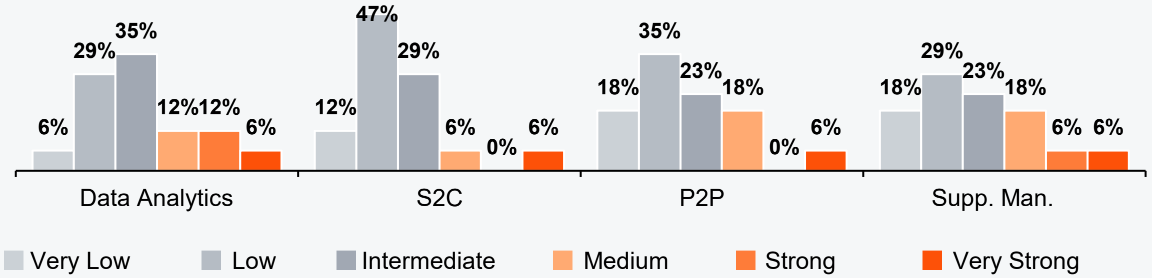
- Procurement savings and efficiency and simplicity are the joint top drivers, each cited by 12 of the 17 respondents (71%).
- 24% expect to invest over USD 3M, the highest of any sector and well above the 9% average, with a further 47% expecting USD 0.5M to USD 1M.
- Data analytics is comparatively mature, with 12% of respondents at "Strong" and 6% at "Very Strong".
- Clear definition of requirements and clear understanding of the current state are the top two success factors, while cross-business engagement (the overall #1) falls to 5th.

Current state

Size of company

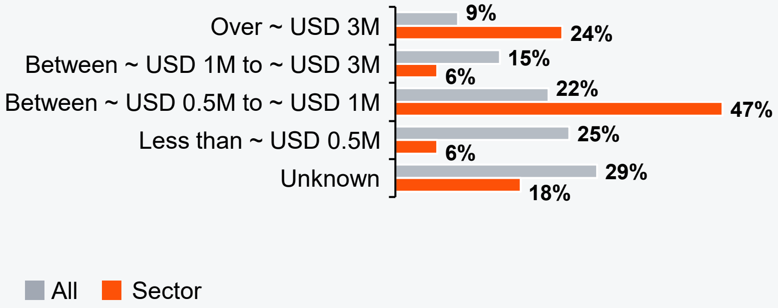


Current digitalisation status



Future state...

Expected investment level



Success factors for digital transformation

	Sector rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	5	-
Change management after go-live	3	4	-

Top drivers for digital transformation

Efficiency and simplicity

12 responses

Procurement Savings

12 responses

Compliance and regulatory

3 responses

* %'s based on complete answers

06

Regional summary

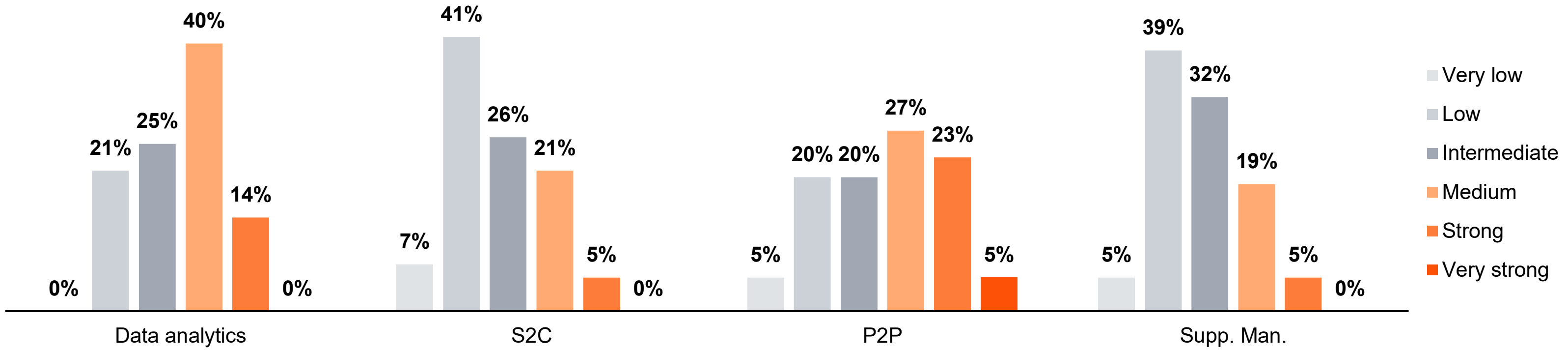
Germany

Regional overview

57
Respondents

Industry	75%
Small and medium	39%
Service	25%
Large and very large	61%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity
51 responses

02

Procurement savings
31 responses

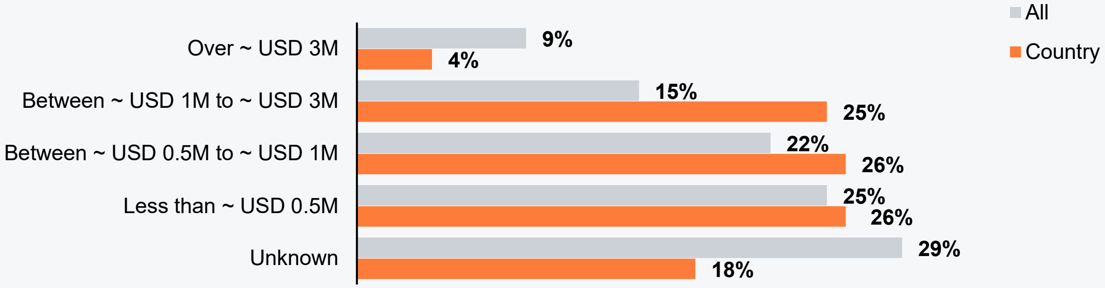
03

AI enablement
10 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Clear definition of requirements and functional processes	1	2	+1
Cross-business engagement	2	1	-1
Change management after go-live	3	3	-

Expected investment level



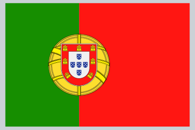
Commentary

- **Efficiency and simplicity leads in Germany** as the main drivers of digital transformation. Repeated across most sectors, often alongside **procurement savings.**
- **AI enablement** as a driver is most visible in **manufacturing, automotive, energy, BFSI and TMT.**
- **Clear definition of requirements** and functional processes is a **recurring key success factor**. Particularly across **manufacturing, automotive, energy and BFSI.**
- **Success factors** are also strongly people and governance-led with repeated emphasis on **change management after go live, sponsorship and senior/ executive level engagement,** and **Cross business engagement.**
- **Digitalisation maturity:** Maturity is generally **stronger in purchase-to-pay** than in source-to-contract and supplier management, with many responses sitting in Intermediate to Medium rather than fully automated.

Portugal

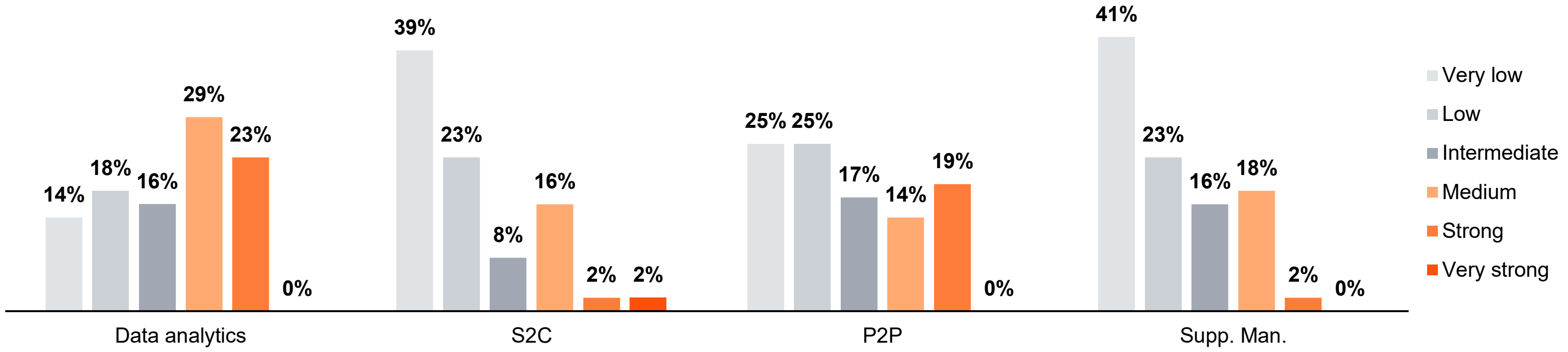
Regional overview

49
Respondents



Industry	52%	
Small and medium	67%	
Service	48%	
Large and very large	43%	

Rate of current digitalisation



Top drivers for digital transformation

01
Efficiency and simplicity
38 responses

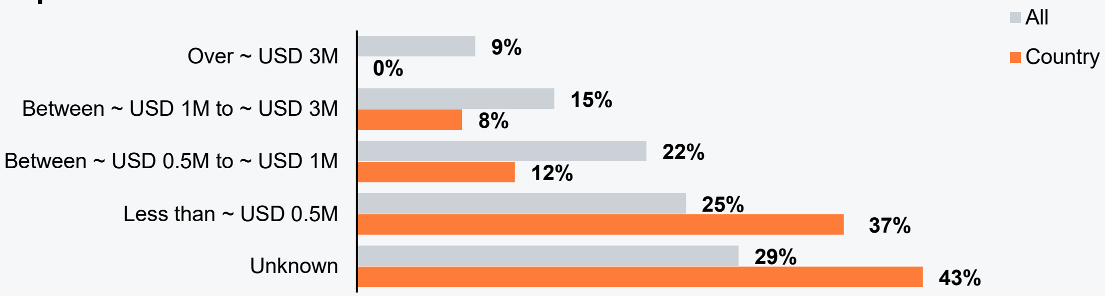
02
Process transparency
19 responses

03
Procurement savings
19 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Change management after go-live	3	3	-

Expected investment level



Commentary

- **Efficiency and simplicity** also lead in Portugal as main drivers for digital transformation.
- **Process transparency** is a notable secondary theme, with **AI enablement** appearing in more **targeted sectors,** especially banking, insurance, financial services, energy, utilities and natural resources, and building and infrastructure.
- **Success factors are strongly implementation** led with repeated emphasis on Cross business engagement, sponsorship and senior/executive level engagement, and clear understanding of the current state.
- **Success** is also centred **on clear definition of requirements and functional processes** and **change management** after go live**.**
- **Digitalisation maturity: Maturity is uneven, with** several responses showing **Very low to low levels in** source-to-contract and supplier management, while Purchase-to-Pay is more **often further advanced**.

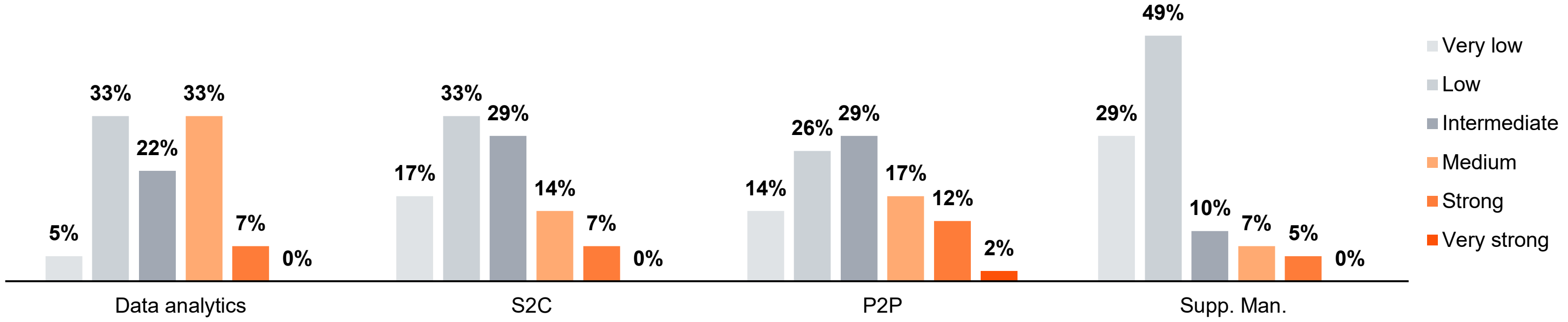
Canada

Regional overview

42
Respondents

Industry	47%
Small and medium	38%
Service	53%
Large and very large	21%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity
37 responses

02

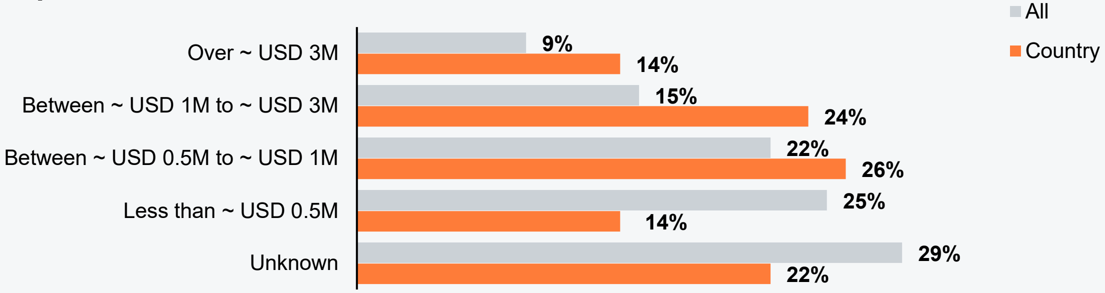
Procurement savings
17 responses

03

AI enablement
10 responses

Success factors for digital transformation	Region rank	Overall rank	
Clear definition of requirements and functional processes	1	3	+1
Cross-business engagement	2	1	-1
Change management after go-live	3	3	-

Expected investment level



*** %'s based on complete answers**

Commentary

- **Efficiency and simplicity** also lead in Canada as main drivers for digital transformation.
- **AI enablement** is also a clear theme, most visible in banking, insurance, financial services and energy, utilities and natural resources, with further signals in technology, software and hardware, telecoms.
- **Clear definition of requirements and functional processes** is a recurring **success factor** particularly in banking, insurance, financial services, energy, utilities and natural resources, and technology, software and hardware, telecoms.
- **Success factors** are also strongly tied to **governance and adoption** with repeated emphasis on **change management** after go live, sponsorship and senior/executive level engagement, and cross business engagement.
- **Digitalisation maturity:** Canada shows a **mixed maturity profile. data analytics** and **purchase-to-pay** are often ahead of **supplier management**, which frequently remains at **low** maturity.

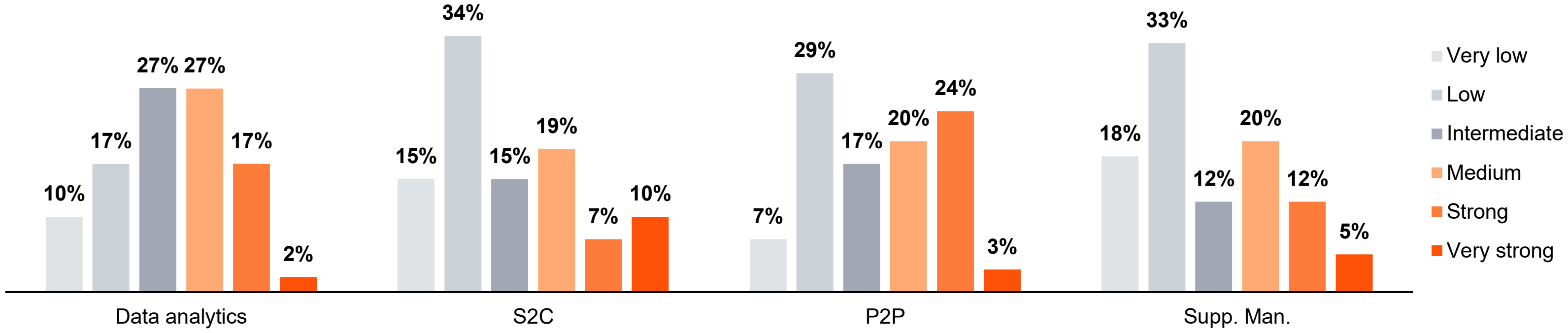
Italy

Regional overview

41 Respondents

Industry	75%
Small and medium	51%
Service	25%
Large and very large	49%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity

28 responses

02

Procurement savings

17 responses

03

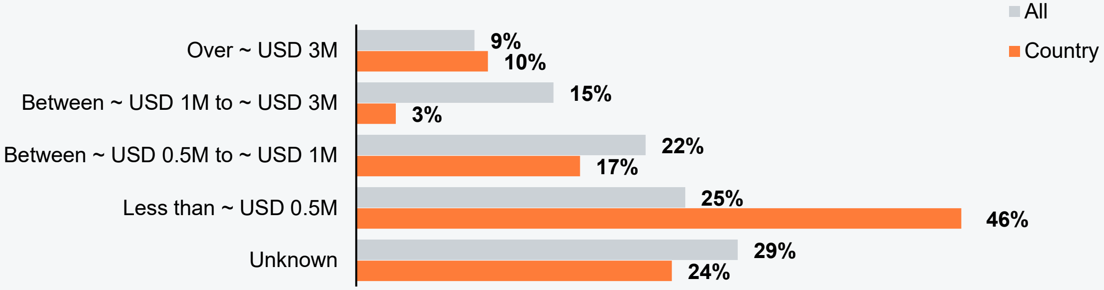
Process transparency

12 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Cross-business engagement	1	1	-
Change management after go-live	2	3	+1
Vendor selection (software)	3	5	+2

Expected investment level



Commentary

- **Efficiency and simplicity** as a transformation driver is a leading theme in Italy notably in **energy, utilities and natural resources** and **manufacturing**.
- **Process transparency** is also a notable theme**, with AI enablement** concentrated in selected sectors**,** particularly in **energy, utilities and natural resources**, **manufacturing**, and **consumer goods**.
- **Success factors** are strongly governance and implementation led with recurring emphasis on **sponsorship and senior/executive level engagement**, **cross business engagement** and **clear understanding of the current state.**
- **Clear definition of requirements and functional processes** and **change management after go live** are also recurring success factors**.** Particularly across **manufacturing** and **energy, utilities and natural resources**.
- **Digitalisation maturity:** Italy appears **polarised**, some sectors show **strong to very strong** maturity, but others remain at **very low to Low**, especially outside core transactional processes.

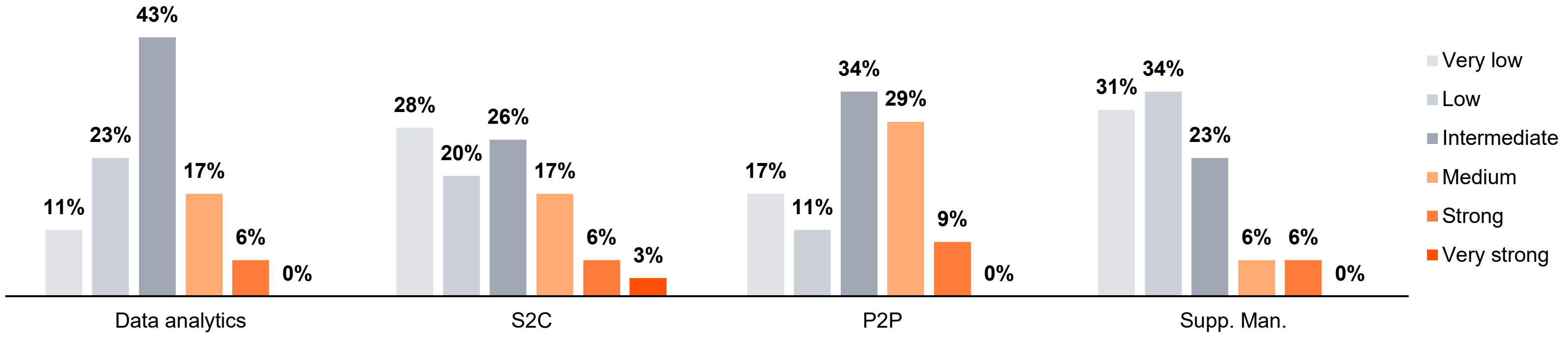
United Kingdom

Regional overview

35
Respondents

Industry	25%	
Small and medium		31%
Service	75%	
Large and very large		69%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity
27 responses

02

Procurement savings
18 responses

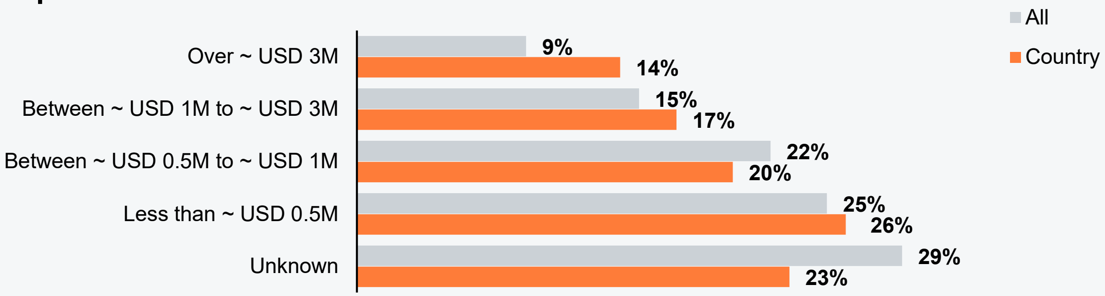
03

End-user experience
8 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Cross-business engagement	1	1	-
Sponsorship and senior/executive level engagement	2	4	+2
Clear definition of requirements and functional processes	3	2	-1

Expected investment level



Commentary

- **Efficiency and simplicity** as a transformation driver is a leading UK theme particularly in **banking, insurance, financial services**, **distribution and retail**, and **professional services**.
- **Procurement savings** remains a major driver, with **AI enablement** appearing in more targeted sectors, most clearly in **banking, insurance, financial services**, **distribution and retail**, and **technology, software and hardware, telecoms.**
- **Success factors** are strongly governance and implementation led with recurring emphasis on **sponsorship and senior/executive level engagement**, **cross business engagement** and **clear understanding of the current state.**
- **Clear definition of requirements and functional processes** and **change management after go live** are also recurring success factors, particularly in **banking, insurance, financial services**, **professional services**, and **distribution and retail**.
- **Digitalisation maturity:** UK maturity is **inconsistent**, with many responses at **Very low to Intermediate** in **source-to-contract** and **supplier management**, while **purchase-to-pay** is typically more mature.

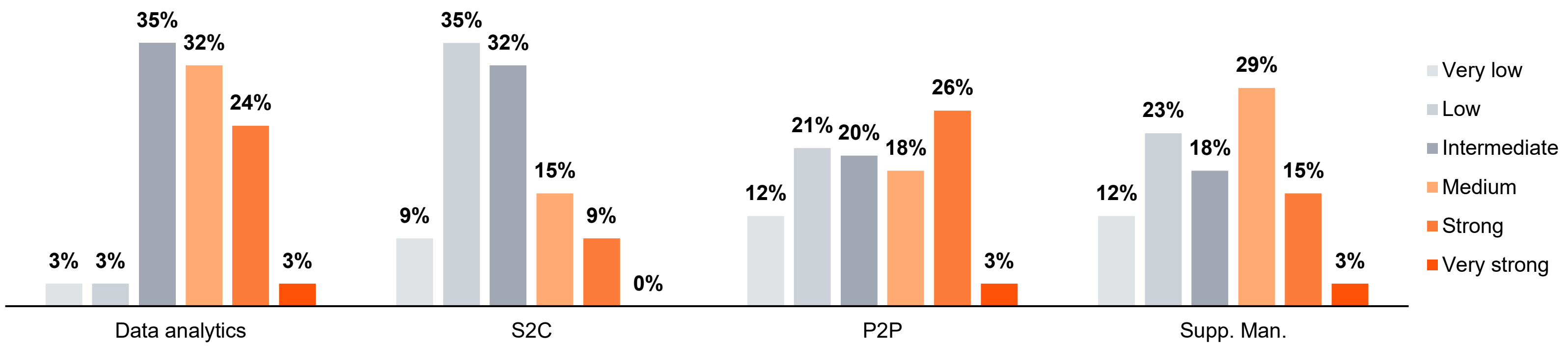
Spain

Regional overview

34
Respondents

Industry	48%
Small and medium	21%
Service	52%
Large and very large	79%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity
26 responses

02

Process transparency
13 responses

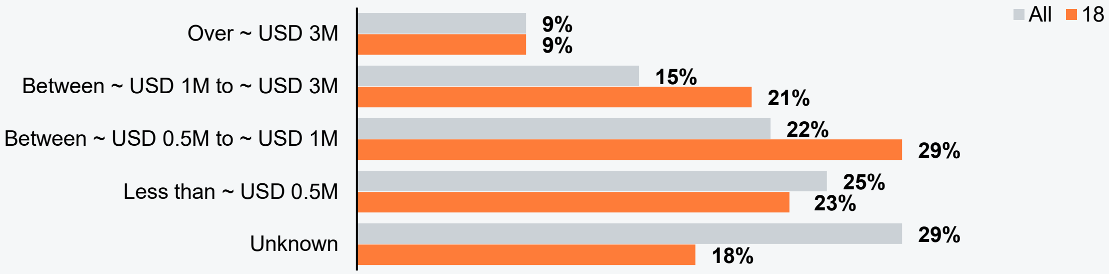
03

AI enablement
10 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Sponsorship and senior/executive level engagement	1	4	+3
Cross-business engagement	2	1	-1
Clear definition of requirements and functional processes	3	2	-1

Expected investment level



Commentary

- **Efficiency and simplicity** as transformation drivers is a leading theme in Spain notably in **banking, insurance, financial services** and **energy, utilities and natural resources**.
- **Process transparency** is a notable theme, with **AI enablement** concentrated in selected sectors, particularly in **energy, utilities and natural resources**, **distribution and retail**, and **banking, insurance, financial services**.
- **Success factors** are strongly governance and implementation led with recurring emphasis on **sponsorship and senior/executive level engagement**, **cross business engagement** and **clear understanding of the current state**.
- **Clear definition of requirements and functional processes** and **Change management after go live** are also recurring success factors especially across **banking, insurance, financial services** and **distribution and retail**.
- **Digitalisation maturity:** Spain shows **stronger maturity in selected sectors**, but overall maturity still tends to be higher in **data analytics** and **purchase-to-pay** than in **source-to-contract** and **supplier management**.

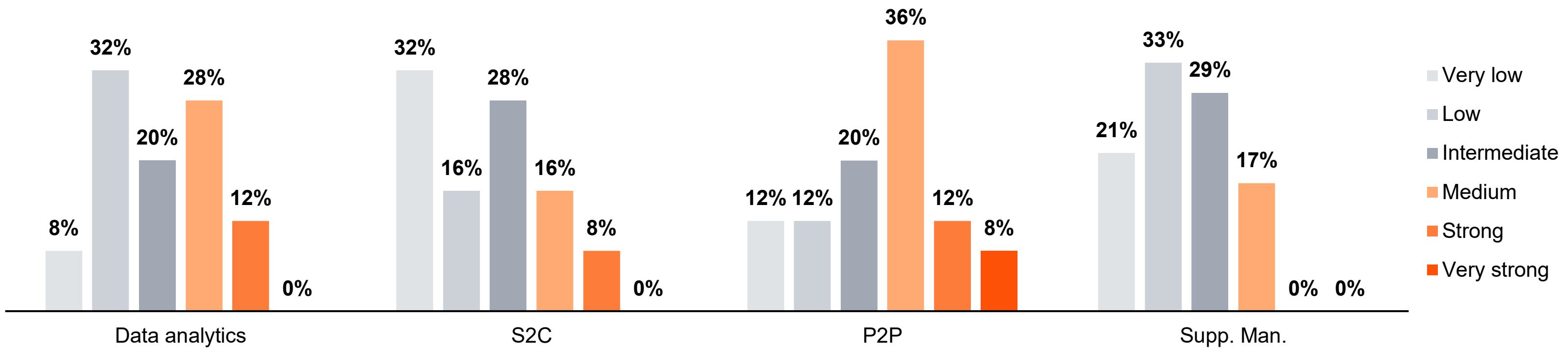
Ireland

Regional overview

25
Respondents

Industry	54%
Small and medium	32%
Service	46%
Large and very large	68%

Rate of current digitalisation



Top drivers for digital transformation

01

Efficiency and simplicity
20 responses

02

Procurement savings
14 responses

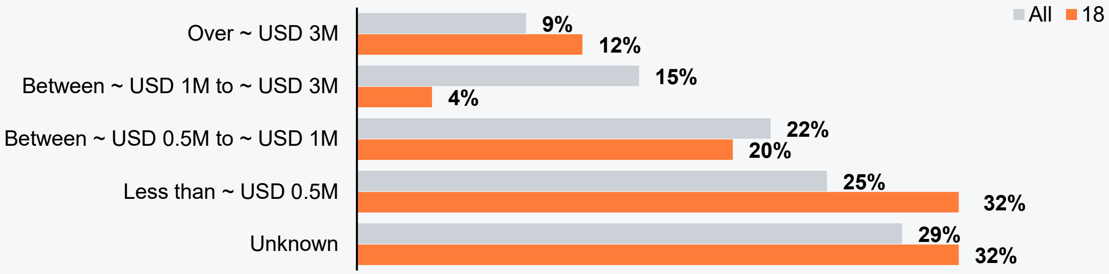
03

Compliance and regulatory
6 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Cross-business engagement	1	1	-
Clear definition of requirements and functional processes	2	2	-
Vendor selection (software)	3	5	+2

Expected investment level



Commentary

- **Efficiency and simplicity** is a leading driver in Ireland notably in **technology, software and hardware, telecoms**, **professional services**, and **healthcare and pharmaceuticals**.
- **Procurement savings** remains a major driver most visible in **technology, software and hardware, telecoms**, **consumer goods**, and **healthcare and pharmaceuticals**. with ai appearing in more targeted sectors.
- **Success factors** are strongly governance and implementation led with recurring emphasis on **sponsorship and senior/executive level engagement**, **cross business engagement** and **clear understanding of the current state**.
- **Clear definition of requirements and functional processes** and **change management after go live** are also recurring success factors particularly in **technology, software and hardware, telecoms**, **professional services**, and **healthcare and pharmaceuticals**.
- **Digitalisation maturity:** Ireland appears **mid stage overall**, with several responses at **low to intermediate** maturity, although **technology, software and hardware, telecoms** and some large companies show more advanced digitisation.

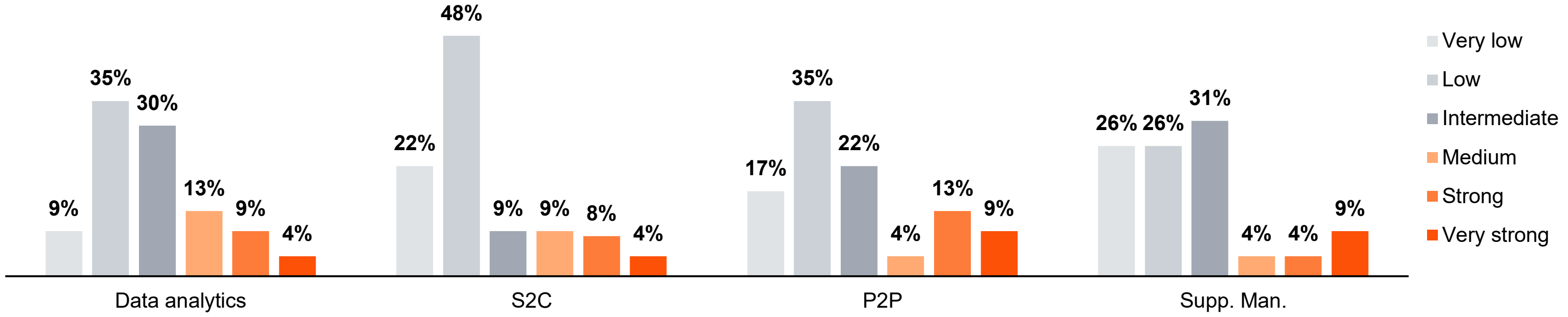
South Korea

Regional overview

23
Respondents

Industry	87%
Small and medium	17%
Service	13%
Large and very large	83%

Rate of current digitalisation



Top drivers for digital transformation

01
Efficiency and simplicity
16 responses

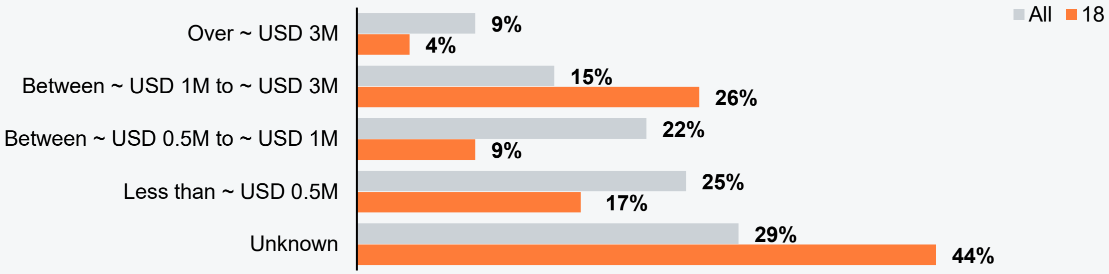
02
Procurement savings
16 responses

03
Crisis/risk management
6 responses

* %'s based on complete answers

Success factors for digital transformation	Region rank	Overall rank	
Clear understanding of the current state	1	6	+5
Clear definition of requirements and functional processes	2	2	-
Cross-business engagement	3	1	-2

Expected investment level



Commentary

- **Procurement savings** is a leading driver in South Korea especially in **manufacturing**, **automotive industry**, and **energy, utilities and natural resources**.
- **Efficiency and simplicity** is also a clear priority most visible in **manufacturing**, **automotive industry**, and **energy, utilities and natural resources**. **AI enablement** appears concentrated in a few sectors most clearly in **manufacturing**, **automotive industry**, and **technology, software and hardware, telecoms**.
- **Success factors are** strongly shaped by **clear definition of requirements and functional processes** and **change management after go live** especially across **manufacturing** and **automotive industry.**
- **Success factors** are also strongly governance and implementation led with recurring emphasis on **sponsorship and senior/executive level engagement**, **Cross business engagement** and **clear understanding of the current state**.
- **Digitalisation maturity:** South Korea shows the **widest spread in maturity** – from **Very low** in some responses to **very strong** in large **manufacturing** and **automotive** players, with **purchase-to-pay** often the most advanced process area.

07

Contact list

Contact us

PwC global procurement and supply chain network

Europe

Daniel Cameron
Partner
PwC UK
daniel.cameron@pwc.com

Pippa Gillibrand
Director
PwC UK
philippa.c.gillibrand@pwc.com

Manual Guettl
Manager
PwC Austria
manuel.guettl@pwc.com

Alexandra Selmer
Senior Manager
PwC Finland
alexandra.selmer@pwc.com

Wolf Goehler
Director
PwC Germany
wolf.goehler@pwc.com

Gölgen Tüfekli
Senior Manager
PwC Turkey
golgen.tufekli@pwc.com

Francesco Bandolin
Partner
PwC Italy
francesco.bandolin@pwc.com

Mark McKeever
Director
PwC Ireland
mark.mckeever@pwc.com

Girorgos Chatzipavlou
Director
PwC Greece
giorgos.chatzipavlou@pwc.com

Diana Kurpniece
Manager
PwC Latvia
diana.kurpniece@pwc.com

Xander de Jong
Senior Manager
PwC Netherlands
xander.de.jong@pwc.com

Pedro Pintos Barros
Director
PwC Portugal
pedro.pinto.barros@pwc.com

Ivan Castro Gutierrez
Senior Manager
PwC Spain
ivan.castro.gutierrez@pwc.com

Lukas Herzog
Manager
PwC Switzerland
lukas.herzog@pwc.ch

Asia/Oceania

David Hodge
Partner
PwC Singapore
david.jc.hodge@pwc.com

Fontane Hau
Partner
PwC Hong Kong
fontane.ft.hau@hk.pwc.com

Jacky Zh Wen
Partner
PwC China
jacky.zh.wen@cn.pwc.com

Americas

David Roselli
Partner
PwC US
david.rosselli@pwc.com

Alicia Stanfill
Partner
PwC Canada
alicia.stanfill@pwc.com

Natalia Andrea Galindo Triana
Manager
PwC Colombia
natalia.andrea.galindo.triana@pwc.com

Thiago Gondim
Partner
PwC Brazil
thiago.gondim@pwc.com

Jose Luis de los Santos
Partner
PwC Mexico
joseluis.delossantos@pwc.com

Africa and Middle East

Abla Rais
Director
PwC Maghreb
abla.rais@pwc.com

Mutasam Al Nazer
Partner
PwC Middle East
mutasem.alnazer@pwc.com

Emovwerha Nwaefuna
Director
PwC Nigeria
emovwerha.nwaefuna@pwc.com

Thank you

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pwc.com