

CPO Survey 2025

Perspective on the Strategic Role of Procurement



Context and purpose

Procurement has long since evolved **beyond cost optimization** and now become a critical driver of business impact. Yet, its full potential remains underutilized and undervalued in many organizations. This report provides a comprehensive look at the **current state of Procurement functions** across European companies, highlighting **key challenges, common levers and persistent pain points**.

Understanding these dynamics is the first step for any Procurement team that's looking to expand its role and deliver revenue growth to its organization. This report considers **Procurement impact leaders**, which are teams that have successfully elevated their role by adopting concrete strategies to enhance their influence and effectiveness. By outlining their focus areas and key actions, such teams serve as a **practical template to follow for Procurement leaders attempting to drive meaningful change**.

By taking proactive steps and aligning Procurement with broader business goals, **CPOs can deliver tangible financial results and strengthen their company's competitive position**. The insights presented here aim to inspire both **Procurement leaders and CEOs** to recognize Procurement as a **key enabler of growth, agility and long-term value creation**. No matter their starting point, **all Procurement teams have the opportunity to enhance their strategic influence and impact**.

A city skyline at night with light trails from traffic on a highway in the foreground.

Discover how leading Procurement teams are **securing a strategic role at the executive level** by leveraging **key focus areas and actionable strategies** to drive **business impact and growth**.

Inverto CPO Survey 2025 | Participants

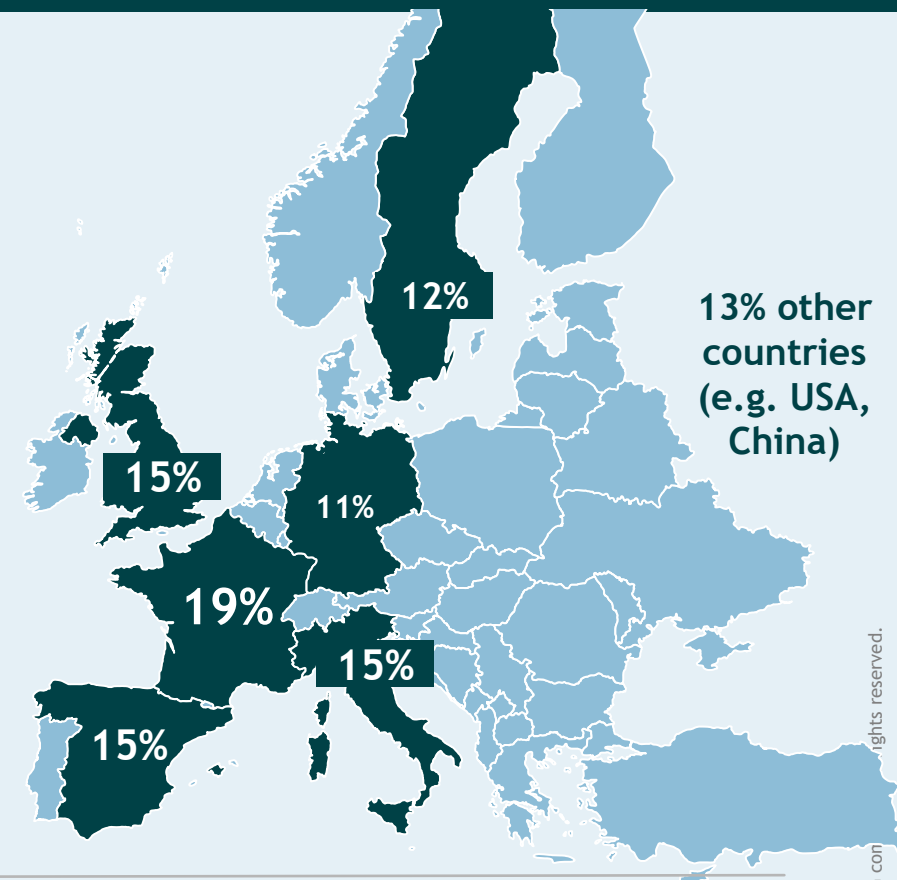
335
Responses

~70%
Chief Procurement
Officers
~30% Procurement directors

20+
CPOs interviewed from
top European companies

34%
Large companies
Rev >1.5Bn€

66%
SMEs
Rev <1.5Bn€



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In a complex and uncertain economic environment, the top three challenges for CEOs highlight the need for strategic Procurement

33%

Of corporate leaders are ranking **cost optimization** as their **most critical priority**

- Amid a complex economic landscape, **cost management remains executives' top priority**.
- Despite this, only **48%** of cost optimization programs are successful.
- **Cultural resistance** to structural cost change is the #1 barrier. Firms that actively focus on aligning their culture around cost-savings and efficiencies can reinvest 11% more from long-lasting structural gains.

Balancing **cost efficiency**, **agility** and cultural transformation

70%

Of executives feel they have sufficient mid-term visibility to **invest in business expansion**

- **Product innovation, talent advancement, sustainability and operational excellence** are the main investment areas where executives hope to seize new business opportunities.
- **67%** of executives plan to reinvest gains from their cost optimization efforts—notably in **AI and digital**—to accelerate product development while automating parts of customer service, sales, marketing and more

Driving **growth**, **business expansion**, and **innovation**

60%

Of executives anticipate **business disruptions due to tariffs** following the US election

- **85%** of executives are already addressing rising interest rates, inflation, tariffs and regulatory changes that threaten **profitability**.
- **40%** of executives nonetheless feel ready to weather market shocks.
- Adapting through new **pricing strategies** will be necessary to manage these **rising supply chain costs**.

Increasing revenue by anticipating an **unstable environment**

CEO priorities that impact the CPO's value proposal and require Procurement transformation

CEOs' challenges and goals

Balancing cost efficiency, agility and cultural transformation

Driving growth, business expansion and innovation

Increasing revenue by anticipating an unstable environment

Levers to bridge the gap to strategic influence

- Raise Board and stakeholder awareness of Procurement's potential for value creation
- Develop leadership and communication skills to focus on agility and Procurement cross-functionality
- Redefine value creation KPIs to engage and mobilize Board and teams

This survey reveals the levers CPOs use to elevate Procurement's role. The objective: to meet company-wide challenges proactively and stimulate growth

CPOs' priorities and objectives

Build legitimacy with the Board to assert Procurement's strategic vision and influence

Boost agility in supplier base and product specifications

Drive ROI, margin and a culture of efficiency

This survey has exposed a profile of CPOs and Procurement teams known as impact leaders, that proactively address EXCOM priorities and are linked to +2% higher average revenue growth

Build legitimacy with the Board to assert Procurement's strategic vision and influence

- For now, only **46%** of Procurement teams consider themselves proactive in identifying value sources within EXCOMs despite **85%** believing Procurement has gained importance in recent years.
- **Leadership and strategic influence is the main challenge** to assess the full scope of value creation levers for 53% of companies.

Boost agility in supplier base and product specifications

- Most Procurement teams meet their supply chain agility objectives through **supplier engagement strategies**—securing partnerships (53%) and diversification (49%).
- Most Procurement teams meet their objectives through recruitment, and by investing in **hard, soft and digital skills development** through training programs.

Drive ROI and a culture of efficiency

- **P&L impact is not systematically measured: savings remain the top Procurement KPI** (cost avoidance for 48%, recurring savings for 45%) while company-owned KPIs are less common (EBITDA impact for 34%).
- **People and skills remain the primary limiting factor** for Procurement (48%), with 42% of teams **lacking expertise in non-core Procurement areas**.

Teams that combine **proactivity towards EXCOM** and **strongly rising importance**

+2%

Estimated **extra revenue growth** for **impact leaders**¹ versus survey average thanks to **proactivity in EXCOM**

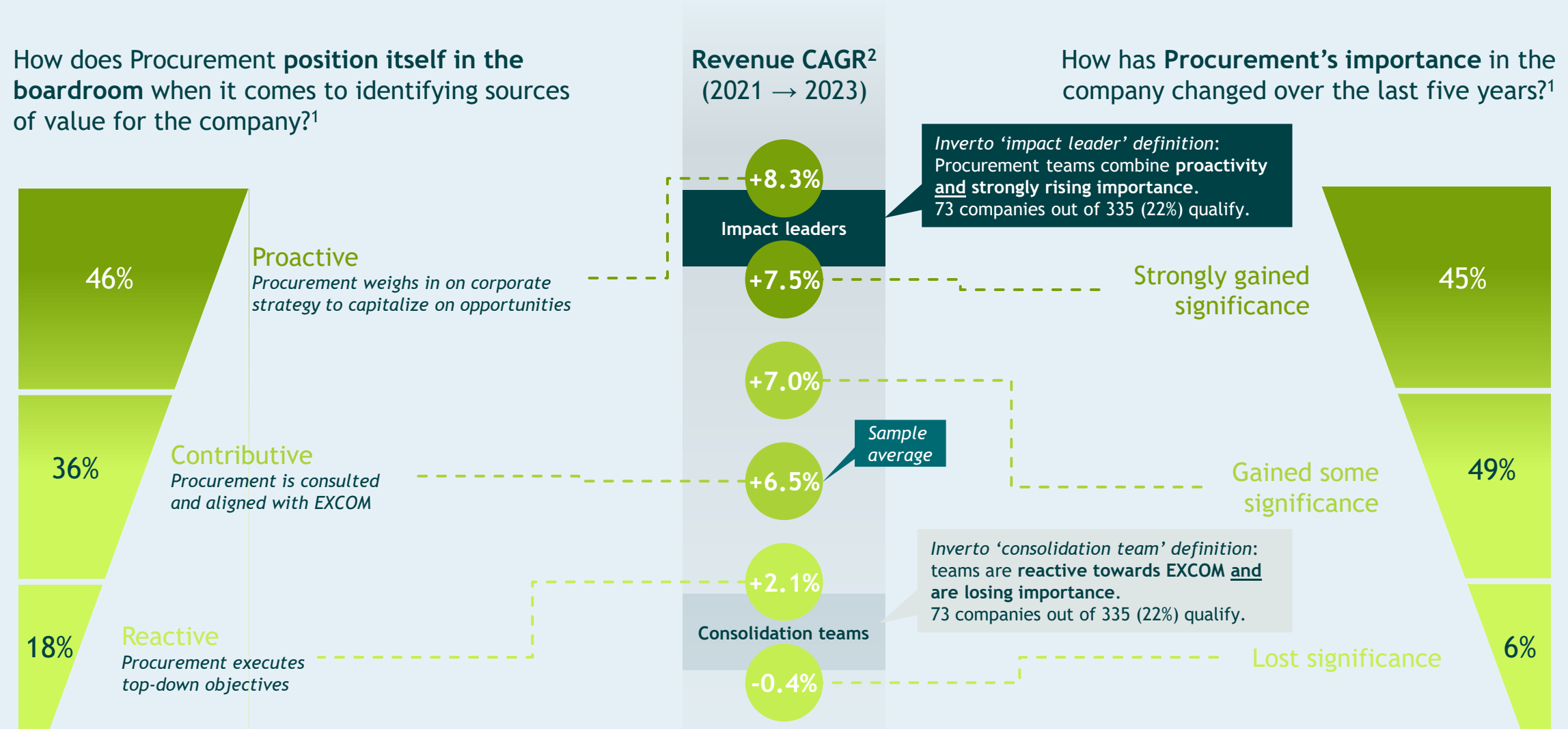
#1

Mitigating supply chain risk is the **number 1 way impact-leading teams** contribute to their company's goals, before cost optimization

56%

Of impact leaders use company-wide KPIs, **revenue or margin % growth**, to **measure their success**

Inverto analysis reveals a connection between revenue growth, and Procurement’s proactive positioning and growing importance within the organization



1 Sample of 335 respondents across Europe
2 Revenue CAGR 2021 to 2023 calculated from financial reports for a sample of 39 French companies having answered accordingly to both questions in the survey

CPO go-to actions to successfully achieve strategic transformation

Mandate



The necessity of a paradigm shift for Procurement functions

Place **P&L impact** at the heart of Procurement performance assessments

Encourage CEOs to build **long-lasting, top-to-top relationships** with key suppliers.

Sourcing
strategies



Value creation initiatives should be **led jointly with business and finance**, based on **ROI logic**:

- **GenAI**: sourcing opportunities by category (IT, marketing, customer service...).
- **Supply chain risk**: supplier base diversification, Tier-n traceability, product re-specification.
- **Growth**: Participate in pricing strategies and cost structures development.
- **Sustainability**: apply and maintain high expectations externally on supplier transparency, and internally on product specifications and supplier selection.

Enablers



Build new capabilities focus on leadership, analytical and technical skills—through targeted training—to transform Procurement teams into **strategic business leaders**.

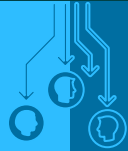
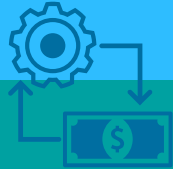
Put **GenAI** at the centre of **buying organisation processes** for market analysis, RFP, negotiation...

Enlarge source-to-pay solutions to Tier-n supplier data monitoring.

Procurement's pathway from execution to influence — a call for action

What gets measured gets funded

Unless you have the right KPIs, Procurement's contributions will remain invisible



Your next top talent will be skilled in Procurement and beyond

Broaden the talent pool, prioritize leadership and soft skills, establish cultural change, and build a function that has cross-functional influence

Strategic influence isn't given — so take it

Proactively focus on impact beyond cost optimization to address Board expectations

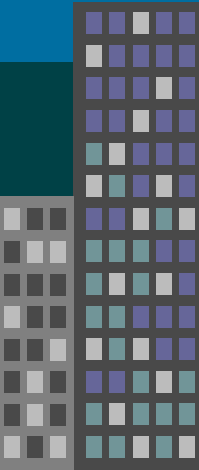


Impact-leading CPOs are future CEOs

The universal skills needed to lead Procurement can allow CPOs to elevate their mandate

Source broader and plan further

Rearticulate value chains regionally, diversify and manage suppliers beyond the historical ecosystem, and anticipate mid- and long-term challenges proactively



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While Procurement's role is gaining strategic importance at a global scale, impact leaders are paving the way for all the components of value creation

Status quo of the survey reveals:

In the meantime, Impact leaders ^{defined slide 14}:

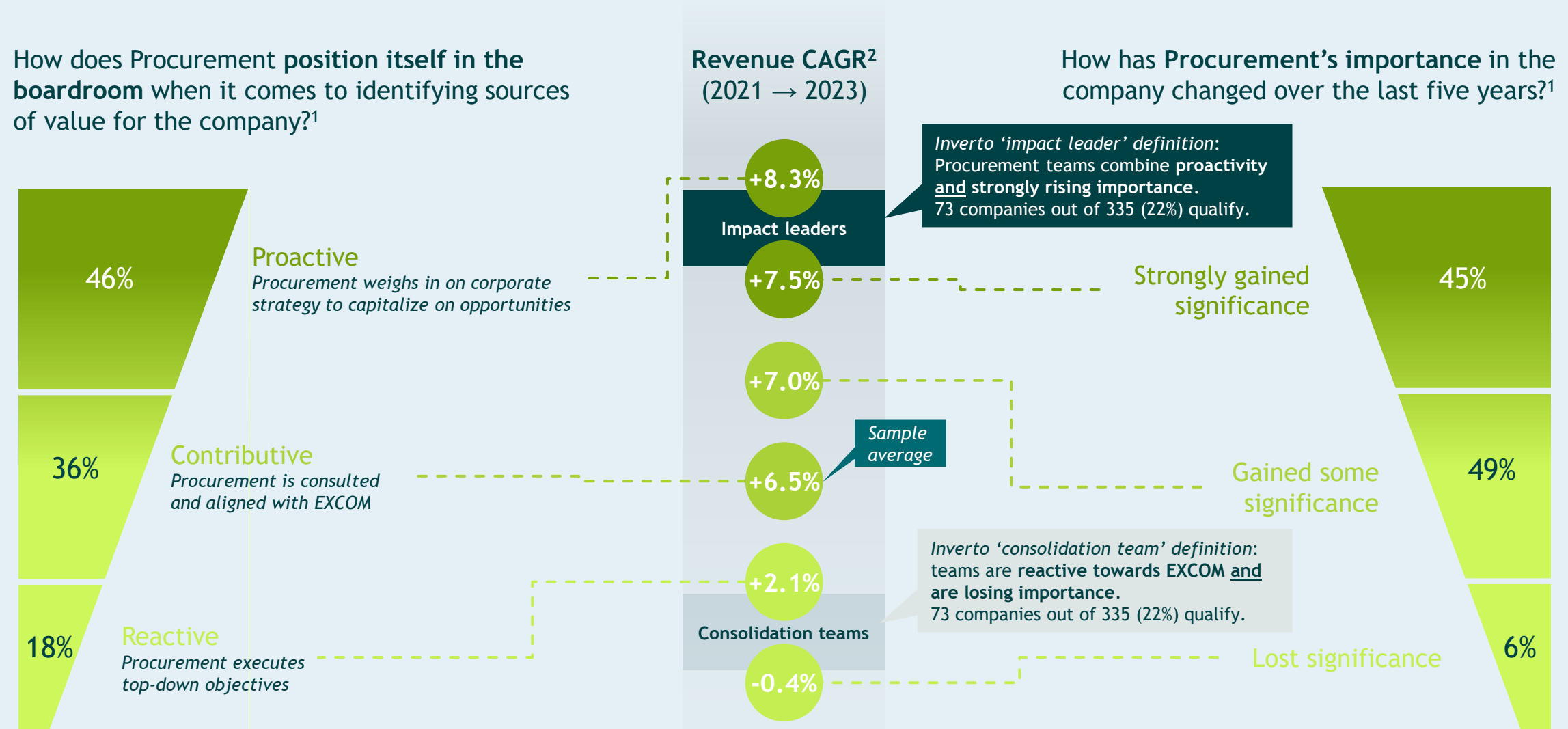
Mandate	Proactivity	<ul style="list-style-type: none"> • Procurement has grown in significance for 85% of respondents over the past 5 years. • 46% of procurement teams consider themselves proactive in identifying value sources within EXCOMs. Yet, 53% have still to maximize their role: 36% are contributive and 18% reactive. 	Cement the importance of Procurement by positioning the function as EXCOMs core allies, ultimately delivering higher revenue growth of +2-3 points (<i>analysis performed on French CPO surveyed</i>)
	Competitiveness & innovation	<ul style="list-style-type: none"> • Competitiveness remains the number one challenge for +50% of respondents, with 51% addressing this challenge through cost optimization. • Innovation is the number two challenge (35%), which is being tackled via market screening and supplier partnerships (42%). 	Differentiate by putting a strong focus on risk mitigation (59%), innovation (42%) and digitalization (51%), and catalysing supplier-led innovation (48%) to fuel the company top line
Targets	Agility	<ul style="list-style-type: none"> • Risk and supply chain resilience is only the fourth priority for Procurement, and mainly addressed through supplier engagement strategies – partnership securitization (53%) and diversification (49%). 	Lead the way in supply chain visibility and agility through process enhancements (66%) and workforce capabilities reinforcement (60%)
	Sustainability	<ul style="list-style-type: none"> • Sustainability ranks as the third greatest priority for procurement, with staff upskilling the most common measure taken (56%) to meet this objective. • Compliance remains a challenge, as only 33% of companies track Scope 3 emissions, only 38% actively support ESG efforts and just 29% monitor non-emission ESG KPIs. 	Integrate sustainability principles earlier, counting on skills development (66%) to bridge the ambition gap, through supplier footprint monitoring (56%) and specifications re-design (62%)
Enablers	Impact measurement	<ul style="list-style-type: none"> • Savings remain the top Procurement KPI (cost avoidance for 48%, recurring savings for 45%). Company-owned KPIs are less commonly used (EBITDA impact only 34%). • Quality, supply chain and budget performance measurements are standard (45%). 	Weigh on P&L by aligning and integrating reporting at Board level, and measure broader impact through supply chain performance, supplier innovation, risk exposure and sustainability
	Skills & Digital	<ul style="list-style-type: none"> • People and skills remain the primary limiting factor for Procurement (48%), with 42% lacking expertise in non-core Procurement areas. • 25% have not yet considered AI implementation, and 52% limit digital adoption to efficiency improvements instead of transformation. 	Invest in soft, hard, and digital skills development through training programs and recruitment, and get the best out of digital tools by enhancing master data quality and AI-driven analytics

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2. Survey core insights

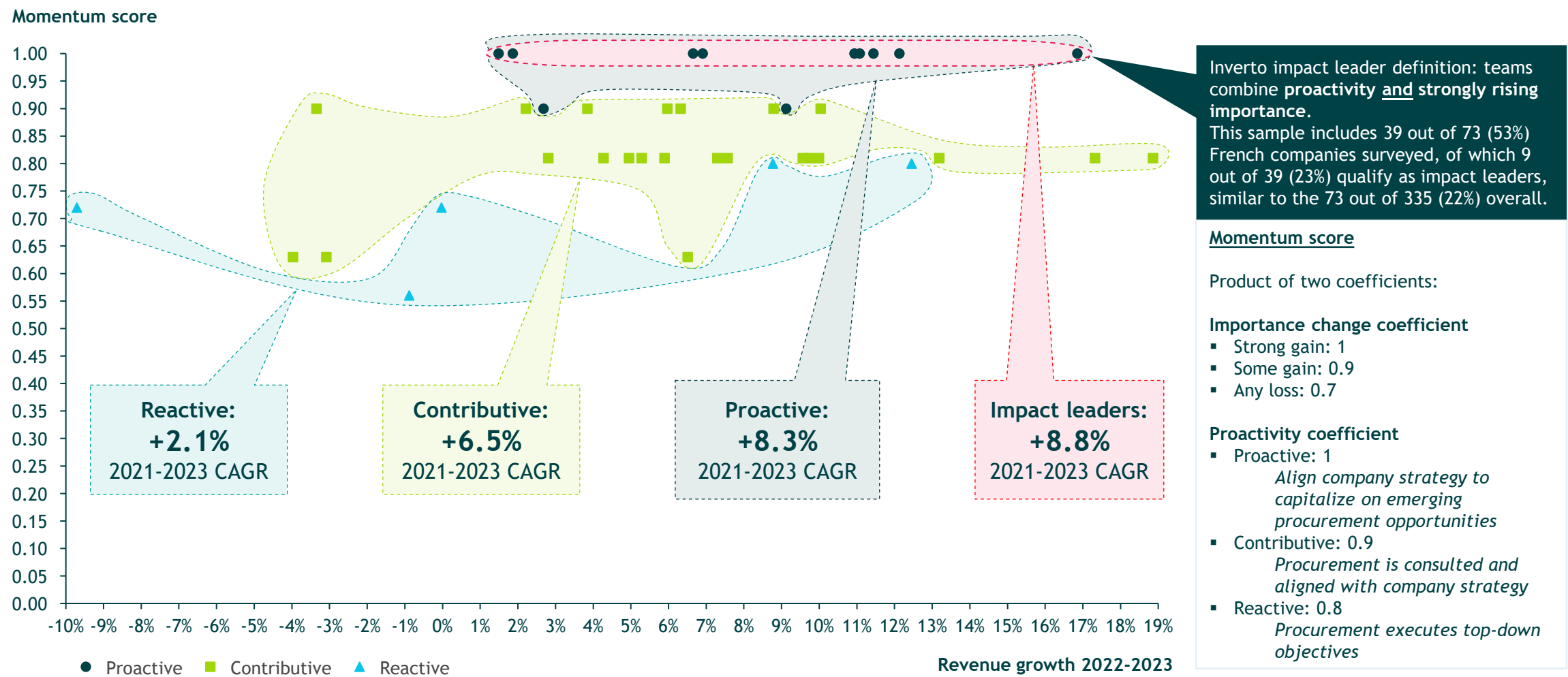
Taking a proactive role in EXCOM to deliver tangible revenue growth

Inverto analysis reveals a connection between revenue growth, and Procurement’s proactive positioning and growing importance within the organization



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² Revenue CAGR 2021 to 2023 calculated from financial reports for a sample of 39 French companies having answered accordingly to both questions in the survey

France focus | Proactive and valued Procurement correlates with higher revenue CAGR, based on a 2021-2023 analysis of 39 companies, using qualitative data scales for momentum score



Impact leaders position themselves as key business allies at the EXCOM level by asserting their influence and establishing their role through success stories

“I see Procurement teams that are technically part of the board, but they don’t necessarily have the full attention of leadership. What impresses me the most is when a Procurement leader is on the board and actively plays their role—challenging, asserting influence and pushing boundaries. Usually, it’s the Procurement director who has pushed their way in to secure a place at the board level.”

University professor

Large Beverage and Consumer Goods company¹ CPO

“Although Procurement is part of the EXCOM agenda, its role is still predominantly evaluated based on cost reductions. Procurement should act as a business ally, building trust through success stories in strategic tenders. Procurement needs to strike a balance between technical expertise and a broad strategic vision.”

“Procurement is involved in the company’s executive strategy as it plays a key role in pricing, cost structures and supply chain efficiency. Procurement is directly involved in executive management discussions and strategic direction.”

Consumer Electronics SME CPO



Impact leader teams move beyond cost savings and position themselves as key business allies at EXCOM level by actively contributing to pricing strategies, cost structures and supply chain efficiency.



This shift requires Procurement leaders to assert influence, build trust through strategic initiatives and push for a broader role in executive management discussions.

¹ Large company: revenue > 1.5 B\$; SME: revenue < 1.5 B\$

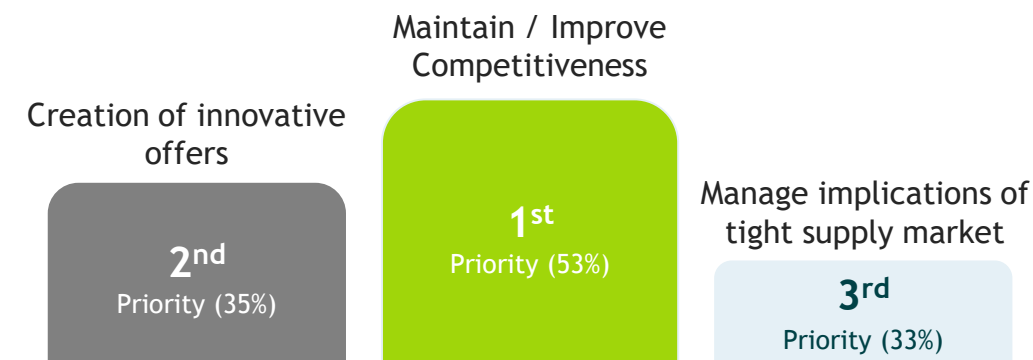
Agenda

2. Survey core insights

Going beyond cost savings impact by making innovation a priority

Enhancing competitiveness is the top challenge for companies, and Procurement plays a key role in achieving that, both by driving cost savings and more...

What are currently the main challenges for your company?



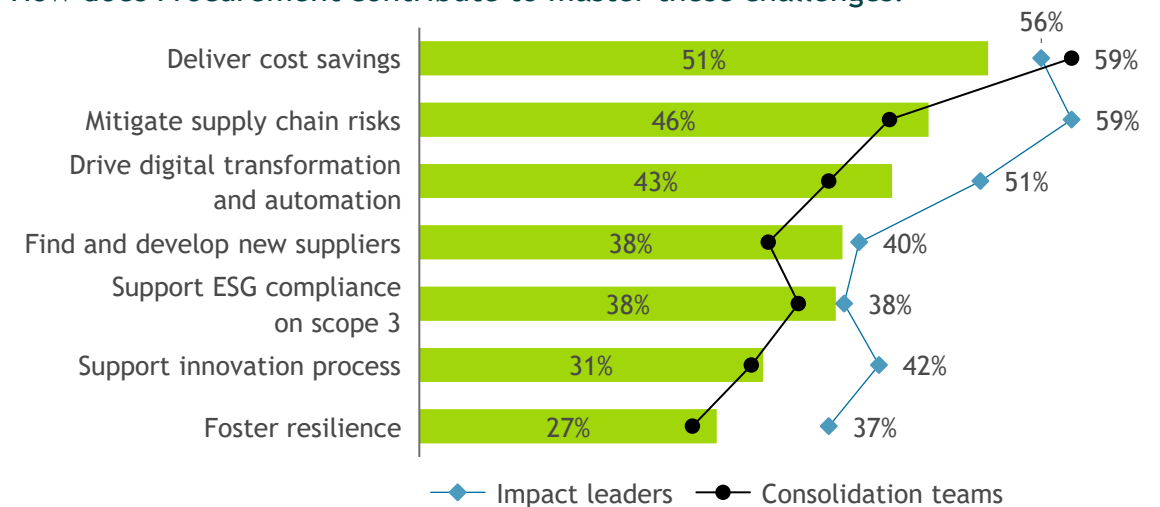
51% of Procurement teams master these challenges mainly by delivering cost savings... but Procurement teams can go beyond savings to weigh on strategy

- Consolidation teams are disproportionately focused on the legacy cost-savings (59%), which come 2nd to mitigating supply chain risks for impact leaders.
- Cost savings remain Procurement's primary contribution across all company sizes, but priorities differ: Large companies focus on supply chain risk and Scope 3 compliance, medium companies on risk mitigation and digital transformation, and small companies on supplier development and innovation.
- In certain industries, digital transformation ranks 1st, especially in Automotive (53%), Building & Infrastructure (58%), and Chemicals & Metallurgy (64%).

Competitiveness remains the **#1** objective for **50%** of companies - this is where Procurement can flex its muscles in building competitive advantage

- Large companies are even more focused on competitiveness (61% of respondents). Their 2nd major challenge is compliance with regulations (43%), which is unsurprising given recent regulatory developments. SMEs appear to be more reactive, with their 3rd significant challenge considered to be solving supply chain issues (35%).
- From an industry perspective, these three challenges remain highly relevant, but specific sectoral challenges also emerge:
 - Talent retention in Building and Infrastructure (38%).
 - Transitioning to renewable energy sources in Energy & Utilities (38%) and Chemicals (64%).
 - Regulatory compliance in Entertainment (50%) and Healthcare (75%).

How does Procurement contribute to master these challenges?



Impact leader Procurement teams go beyond cost savings to enhance company competitiveness by equally prioritizing risk mitigation, supply chain agility and innovation process support

“Procurement is now perceived and positioned as one of the key levers of the company's competitiveness. We are expected to deliver Procurement performance, but not only in terms of financial results.”

**Large Construction
company CPO**

**Large Healthcare and
Emergency Services
company CPO**

“We want to change the narrative—beyond just savings—to supplier innovation, strategic partnerships, and risk reduction. We need to create a more resilient supply chain because we keep hearing from the business that we talk too much about savings. Now, we will focus more on resilience and partnerships. We measure savings deeply because that's our ticket to ride. It gives us credibility to do all the other strategic things we want to implement.”

“We are entering a new business model where we no longer just sell vehicles—we sell solutions, requiring us to rethink Procurement's role in competitiveness. Risk mitigation, resilience and transparency in the supply chain are key levers for competitiveness.”

**Large Automotive
company CPO**



Impact leader Procurement teams go beyond traditional cost-saving measures to drive sustainable company competitiveness. They equally prioritize risk mitigation and agility by diversifying supplier networks, fostering strategic partnerships, leveraging digital transformation and ensuring supply chain agility.



By proactively addressing market disruptions, regulatory compliance and environmental challenges, they enhance long-term business stability while unlocking new growth opportunities.

Innovation is the second biggest challenge for companies, and Procurement teams mainly drive it by focusing on market screening and leveraging suppliers

What proportion of innovation in products and services sold is derived from innovations unearthed with suppliers?



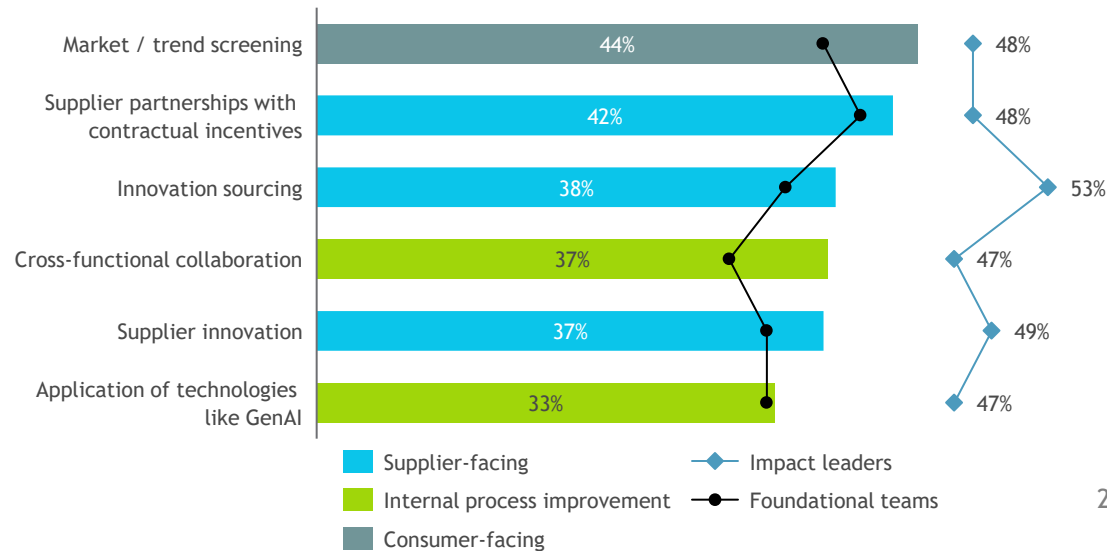
44% of organizations prioritize market trend screening, and 42% leverage supplier partnerships with contractual incentives as key innovation drivers

- Impact leaders predominantly leverage innovation sourcing (53%); Consolidation teams are especially lacking in cross-functional collaboration (30%) to deliver innovation.
- The most widely used value delivery measure for innovation is "Market/Trend Screening" (42%), followed by "Supplier Partnerships with Contractual Incentives" (41%). These findings suggest that organizations prioritize external market analyses as their key strategies to foster innovation.
- "Application of technologies like GenAI" is the least utilized measure at 34%. This suggests that, while advanced technologies hold potential, they currently play a secondary role compared to traditional measures like partnerships and sourcing.

34% of companies report that supplier-led innovation significantly contributes to their product and service development

- The proportion of innovation in products and services sold that originates from supplier collaborations is higher for Large to Very Large companies (38%). This can be attributed to their extended supplier networks, strategic positioning and established Procurement influence, making it easier to engage suppliers in co-development initiatives.
- Looking at industry sectors, innovation exceeds the 34% average across all manufacturing sectors, including Automotive, Building and Chemicals. Indeed, in highly regulated or capital-intensive industries, supplier-led R&D plays a key role in advanced innovation.

Which value delivery measures do you take to drive innovation?



Impact leader Procurement teams master the innovation challenge by prioritizing supplier-led innovation and all supplier-facing measures, including partnerships and innovation events

“Most of the significant part of our innovation solutions that we develop is in close partnership with suppliers. For someone like us, where there’s a high rate of range renewal - and to be able to capture trends fast, making sure that our range is relevant - the only solution is to work with suppliers.”

Retail SME CPO

**Large Automotive
Equipment company
CPO**

“We have pushed the topic of innovation management this year. That means we have designated a person from each purchasing division and segment who deals with innovations and challenges sales and development on the other side. Our goal was to hold ten innovation days with suppliers this year. We are now at eight and will reach ten by the end of the year. An innovation day means that a major supplier gets a full day with us to present their expertise in development, operations and logistics. From there, internal projects are initiated.”

“Innovation comes up with new solutions together with our suppliers and how to mitigate any weather impacts—it might be different innovative solutions, technical solutions, whatever. We are trying to utilize what they know. This could also be in the cybersecurity area, where we come up with new products for our customers together with some of our partners. One of our challenges is internally aligning with our own innovation roadmap. Sometimes, suppliers bring great ideas, but they don’t fit into our internal strategy, which makes them difficult to implement. We need to adapt more to supplier-driven innovation and align better with their expertise.”

**Large Insurance
company CPO**



Impact leader Procurement teams build long-term partnerships with suppliers to co-develop innovative solutions, anticipate market trends and strengthen competitive advantage.



They implement dedicated initiatives, such as innovation days and co-development projects, to systematically integrate supplier expertise into business growth. By ensuring supplier-driven innovations align with corporate priorities, best-in-class teams enable faster adoption, new revenue streams and enhanced operational efficiency.

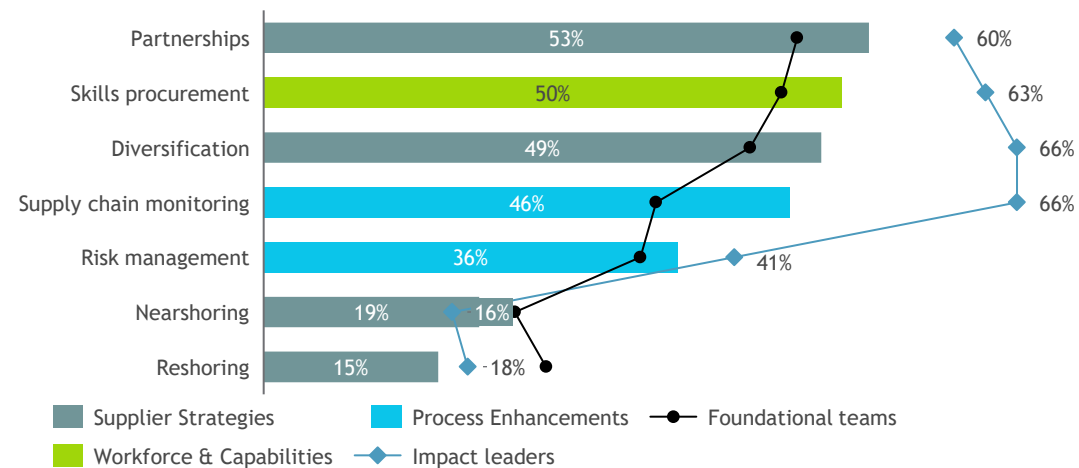
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2. Survey core insights

Fostering agility to thrive in an ever-changing market environment

Despite reduced post-COVID urgency, supply chain agility remains a priority - enabled by supplier engagement strategies, internal capability development and process optimization

Which value delivery measures do you take to manage risk and enhance supply chain resilience?



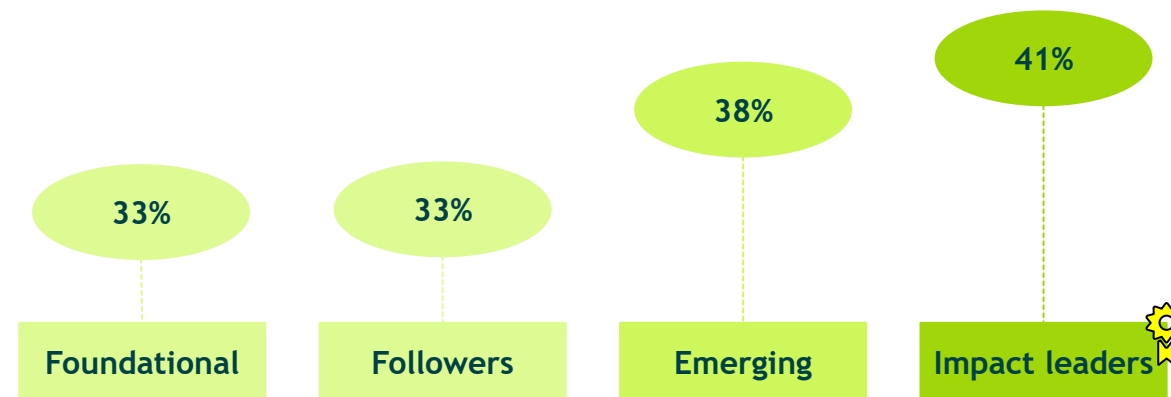
41% of impact leader Procurement teams show the way forward in supply chain visibility and reactivity by implementing risk management frameworks and predictive analytics

- Heavy industries lead the way in supply chain monitoring, with 50% of companies in Aeronautics, Defence & Security, Automotive, Building & Infrastructure, Chemicals & Metallurgy, and Manufacturing implementing this lever. That's versus 11% in Healthcare, Professional Services, Entertainment & Communication, Technology & Software, and the Public Sector, where 74% of companies are focused on diversification.

Impact leader companies put more emphasis on diversification than partnerships and upskill at higher rates to achieve internal process enhancements

- Up to 62% of large companies rely on skills procurement, leveraging higher recruitment agility, compared to 46% of SMEs.
- Nearshoring and dual sourcing are increasingly used, with 35% of companies reporting improved supply continuity through regionalized sourcing.
- Impact leaders' teams are significantly more advanced in their supply chain management strategies like diversification (66% vs 49%) and process monitoring (66% vs 46%), which can, in part, be explained by their greater share of skills procurement (63% vs 50%).

Share of companies implementing risk management frameworks and predictive analytics rises with increasing Procurement maturity



Impact leader Procurement teams anticipate, adapt and secure stability before disruptions strike - by increasing transparency and proactively managing their supply chain

“We need to move beyond outdated processes and governance structures to truly empower Procurement. Right now, we don’t always have the facts on the table and decisions get stuck in the system. A more data-driven approach—where automated risk monitoring alerts us in real-time, like detecting an event affecting a Tier 5 supplier—would allow us to shift from reactive firefighting to proactive risk management. Without this transformation, Procurement remains focused on cost rather than creating real value.”

**Large Automotive
company CPO**

**Large Facility
Management and
Services company CPO**

“We have a very fruitful relationship with our suppliers, they co-develop with us—bringing the latest technology, prescribing methods, materials, and chemicals, and helping us document and standardize best practices across the company. It’s not sending a spaceship to Mars but, in our world, that’s co-development, even innovation. In food services, we work closely with local suppliers on ingredient lists, menus and even inflation management. In subcontracting, however, there is more work needed to deepen those partnerships.”

“We have a very structured and rigid process for tracking supplier performance. Every project we conduct is signed off with documented impact, and we update our savings tracker, which is managed by our Procurement finance officer. Each project requires validation from the relevant business owner—whether it’s IT or another function—before signing off on the savings. We physically sit down at least once a month with finance to review and validate these numbers, ensuring credibility. We are committed to transparency and rely on high credibility in our reporting.”

**Large Healthcare and
Emergency Services
company CPO**



Impact leader Procurement teams leverage automated risk monitoring and predictive analytics to transition from firefighting disruptions to strategic resilience.

Overcoming outdated governance structures and fragmented data enables mitigating risks before they escalate.



Leading organizations co-develop solutions with suppliers and monitor their success - integrating new technologies, materials and process optimizations to drive efficiency and innovation.

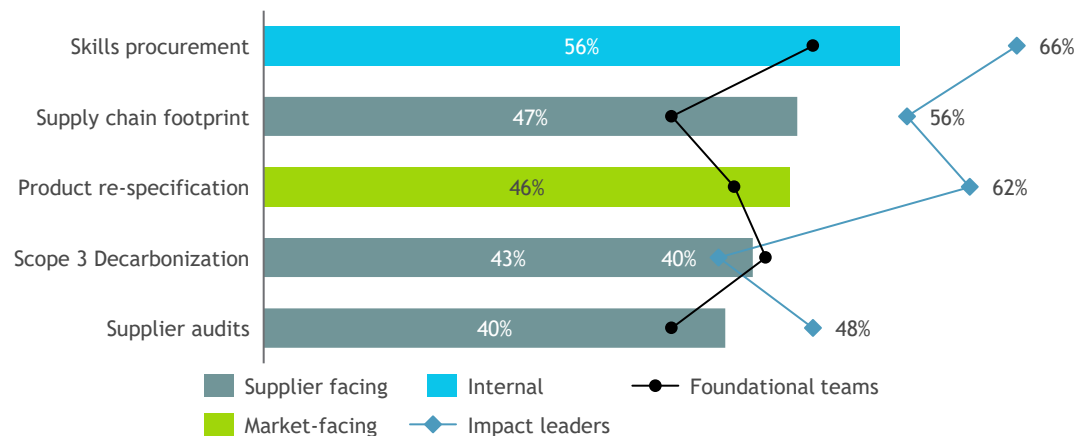
Agenda

2. Survey core insights

Leveraging sustainability efforts to
create value

Sustainability is an opportunity to develop supply chain best practices that also benefit the rest of Procurement’s objectives, like transparency and agility

Which value delivery measures do you take to achieve sustainability goals?



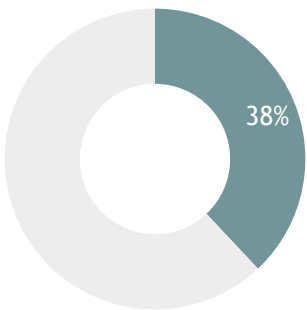
The upskilling necessary to achieve sustainability goals also improves supply chain monitoring and cross-functional cooperation over product re-specification

- Upskilling is a major lever for 56% of companies in pursuit of their sustainability efforts. Two-thirds of impact leaders succeed with upskilling through new hires.
- 56% of impact leader companies review their supply chain footprints as part of meeting their sustainability targets, compared with just 36% for foundational teams.
- 40% of companies leverage audits among their suppliers to monitor sustainability with transparency.

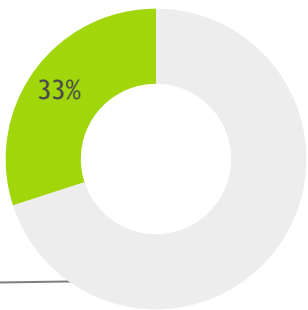
Sustainability is the 3rd most valued key for value creation and 2nd most lacking capability for Procurement teams - companies should generalize KPI tracking in this field

- Only 33% of companies measure scope 3 emission reductions, despite 38% supporting their company’s efforts in this field. Also, only 29% monitor non-emission-related ESG KPIs.
- This figure is stronger among large to very-large companies, where 50% monitor scope 3 emissions, versus 24% for SMEs.
- Heavy industries are lagging here, with 27% of companies across Aeronautics & Defense, Automotive, Chemistry & Metallurgy and Manufacturing sectors measuring their scope 3 emissions despite higher-than-average impact.

Does Procurement support ESG compliance on scope 3?



Do you measure scope 3 emissions?



Strongly enables

77% Of companies do not track their scope 3 emissions. Monitoring this, as well as non-emissions-related ESG, is necessary to boost company-wide sustainability efforts.

Leading Procurement teams strive to take ESG from ambition to action, starting with monitoring their supplier's footprint and putting quantifiable KPIs in place

“We are working more and more with circular materials, where supplier innovation plays an important role, and its importance is rising. Right now, we are redesigning our products, working on specifications, and focusing on fit-for-purpose, cost-efficient, circular materials. This shift is not just about the present—it’s about ensuring the company’s future sustainability in the market. While it hasn’t been a major focus historically, it is now becoming increasingly visible and essential.”

**Energy and
Environmental
Solutions SME CPO**

**Large Automotive and
Manufacturing
company CPO**

“We have made ambitious sustainability commitments, including the CO₂ pact signed by Antoine Raymond, setting a goal of carbon neutrality by 2040 and a 30% emissions reduction by 2030. This transition also involves diversification, as demonstrated by our new 25,000 m² factory in Grenoble, dedicated to the healthcare sector—marking a strategic shift beyond the automotive industry.”

“Today, Procurement is seen as a key driver of competitiveness, not just from a financial perspective. We are strongly committed to ESG issues, including reducing our carbon footprint, ensuring due diligence and complying with regulations such as CSRD and CSDD. Since taking on this role in 2017, I have placed ESG at the core of our strategy by building a dedicated team and structuring our initiatives around responsible Procurement. This has enabled us to become the first construction company in France to receive RFAR certification and to mainstream the use of low-carbon concrete across our projects worldwide.”

**Large Construction
company CPO**



Supply chain transparency is hugely important for avoiding disruptions proactively and with agility: measuring suppliers’ footprints and performing audits on their ESG practices are strong sustainability enablers.



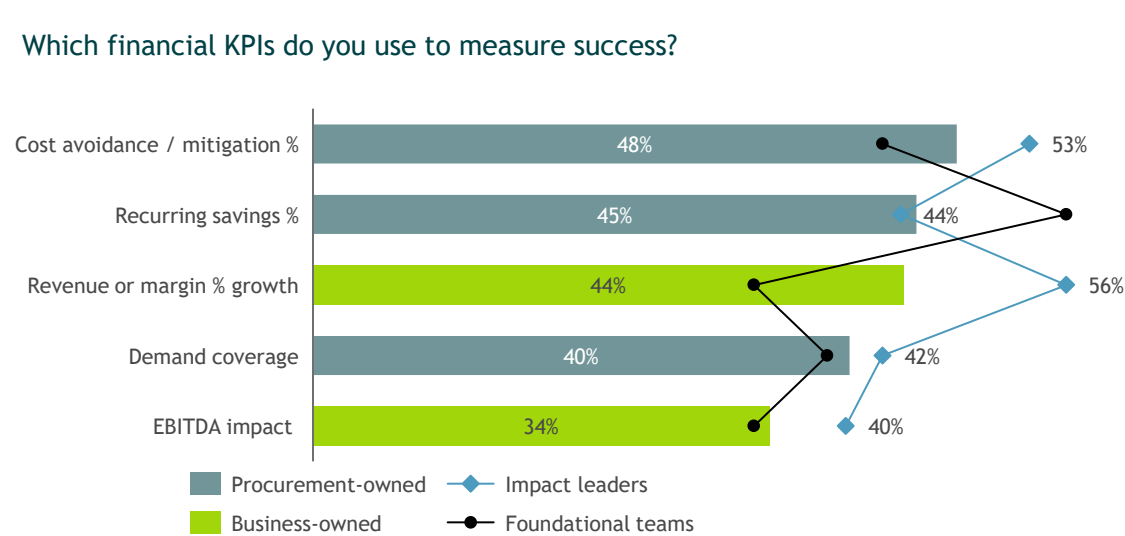
A lack of quantifiable metrics can lead to inefficient strategies: tracking KPIs is key to tackling compliance and sustainability challenges.

Agenda

2. Survey core insights

Bridging the reporting gap to reach
company's headlines

Procurement-owned savings remain the primary success metric, along with quality and supply chain performance. However, if Procurement’s impact isn’t on the P&L, does it even exist?



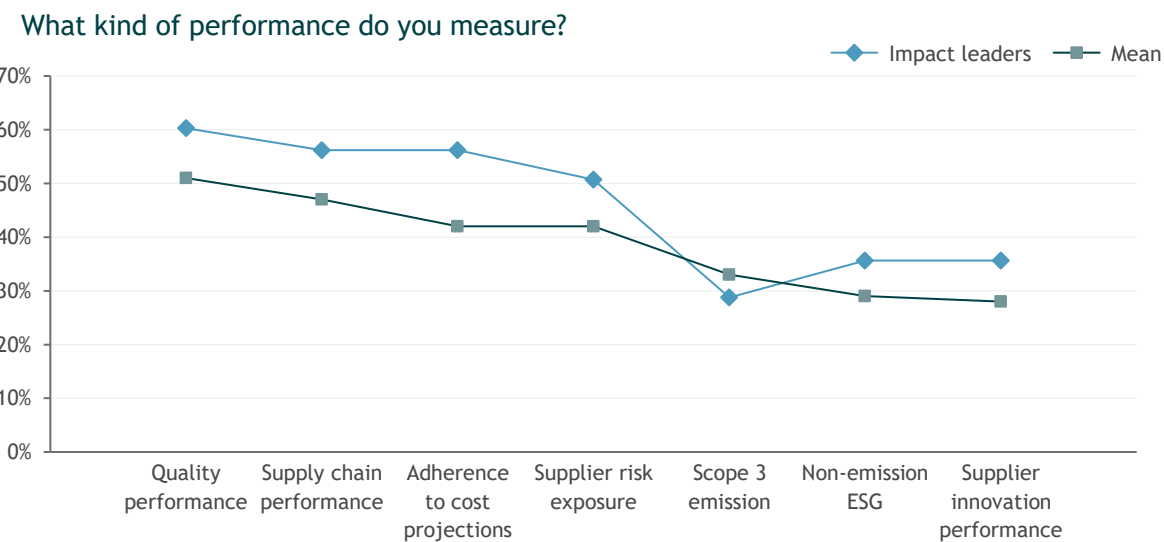
Measurement of quality, supply chain and budget performance are no brainers for ~45% of companies

Discrepancies appear on risk exposure and ESG

- Regardless of size, most companies focus their performance measurements on quality, supply chain and budget. These elements reflect the commonality of challenges shared across all businesses.
- Looking at the measurement of supplier risk exposure and ESG-related KPIs, practices differ significantly according to company size. Measurement complexity and de-prioritization at the strategic level explain these gaps.
- Supplier innovation performance is the most overlooked metric, with only 28% of companies measuring it.

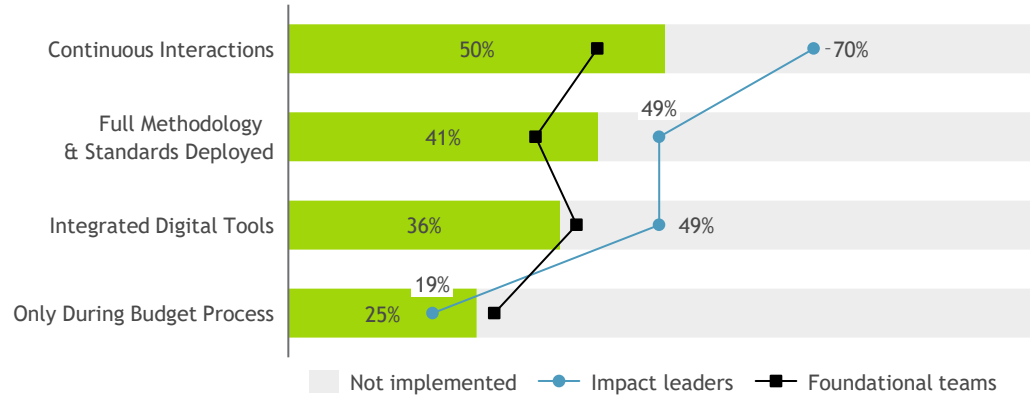
Savings delivered are still holding the top line of Procurement actions, while company-owned KPIs are less common

- KPIs directly related to top-line of the company, such as growth and EBITDA impact, are more developed among impact leaders. Meanwhile, the predominance of Procurement-owned KPIs among consolidation teams underlines the challenge of aligning Procurement, and company definitions of performance.
- With Procurement’s core objective being competitiveness, the saving generated is naturally the main KPI reported. Cost avoidance is less tangible in the P&L and reveals the backstage performance of Procurement teams.
- Savings will directly impact a company’s financial KPIs, and the bridge is to be built that secures the alignment of objectives.



Procurement teams are increasingly interacting with finance. However, performance tracking remains limited as a full methodology and integration into digital tools is not yet enforced

How are you ensuring alignment with finance for performance monitoring?



Only **50%** of companies have continuous interactions with finance, limiting the potential for performance tracking beyond Procurement-owned KPIs like savings

- Impact leaders display greater abilities to align with finance, while 1/4th of foundational teams only align during the budget process.
- 41% of companies have a full alignment methodology in place. Large and very large companies have a head start here with 54%, versus 35% for SMEs.
- Again, large companies have a higher rate of digital integration - at 44% - compared to 32% of SMEs relying on digital tools for alignment.
- These alignment strategies also shed light on how non-financial KPIs are correlated with revenue growth - like linking agility scores with reduced vulnerability to external disruptions.

1

Broaden performance metrics beyond cost savings to tackle company-wide challenges

- Address business growth, risk mitigation, sustainability and operational efficiency metrics.
- Communicate on supplier-led innovation and time-to-market impact.

2

Reinforce alignment with finance to reflect Procurement's contribution

- Finance teams need measurable Procurement data that links supplier risk, cost efficiencies and ESG compliance to profitability and business continuity.

3

Leverage digital tools for real-time analytics and EXCOM visibility

- Standardize data-sharing practices between Procurement, finance and strategy teams to ensure alignment.
- Digital integration helps Procurement teams move beyond static reporting and provide actionable insights to EXCOM.

Leading Procurement teams create value beyond traditional financial metrics and embed metrics at the corporate level. That enables them to fully track all aspects, including supply chain performance, supplier innovation, risk exposure and sustainability

“Procurement at [our company] is directly embedded in EXCOM, reporting through our global business performance function. We have clear targets, and we know that if we miss even slightly, [our company] will miss its financial goals—so there is significant attention on Procurement’s impact. We have a centralized value capture system, where every project is tracked and must be approved by finance before counting towards the P&L. We measure cash, decarbonization and residual risk, but when dealing with EXCOM, Procurement must present outcomes, not just enablers.”

**Large Facility
Management and
Services company CPO**

“Procurement has long been focused on cost reduction, but this approach is no longer sufficient. Today, real value creation comes from directly contributing to the company’s growth. I have completely reversed the logic: instead of solely discussing productivity and savings, we have established strategic meetings with our suppliers, focused on innovation and market opportunities. We no longer talk just about money but about direction and joint development. However, measuring this impact remains a challenge. What we do generates immense value, but traditional metrics do not always capture it. The key challenge now is to rethink how we evaluate Procurement performance to truly reflect its strategic impact.”

**Large Automotive and
Manufacturing
company CPO**

“We have a very rigid and structured process for tracking cost savings, ensuring transparency with finance. But Procurement performance cannot be limited to savings and efficiencies—we need to expand beyond financial KPIs. Our goal is to introduce new metrics, including supplier performance, customer satisfaction and strategic impact. Ultimately, Procurement should be seen as a business partner that delivers real value, not just cost reductions.”

**Large Healthcare and
Emergency Services
company CPO**



Leading Procurement teams expand performance metrics beyond cost savings by tracking supply chain performance, supplier innovations, time-to-market impact, risk mitigation contributions and sustainability in order to track and communicate their broader strategic value.



They shift focus from financial efficiency to a broader set of KPIs, and use predictive analytics and risk modelling to position Procurement as a proactive business enabler, rather than a reactive cost-management function.

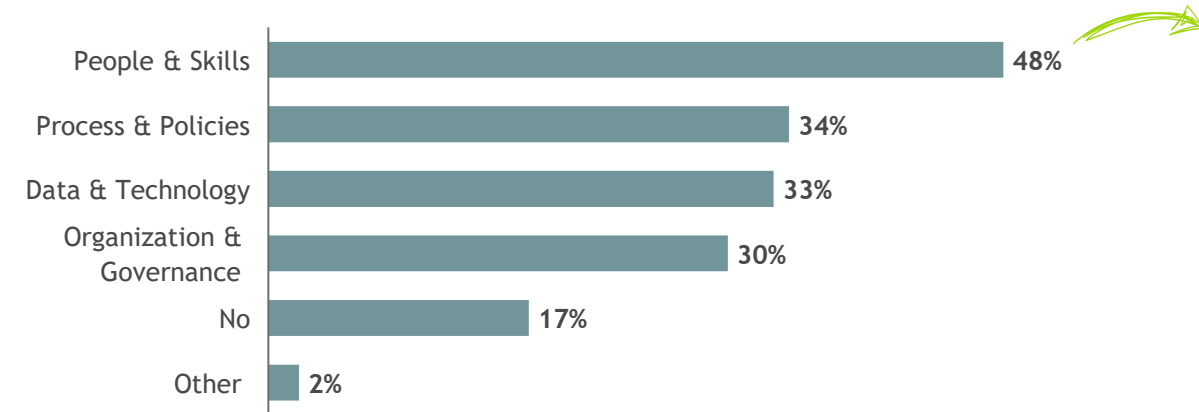
Agenda

2. Survey core insights

Prioritizing hard, soft and digital skills development

People and skills are the primary limiting factor for Procurement value delivery, especially in non-core Procurement skills

Are there limiting factors to deliver full value on your Procurement area?



48% of companies report that **People & Skills gaps** are the top barrier to Procurement value realization

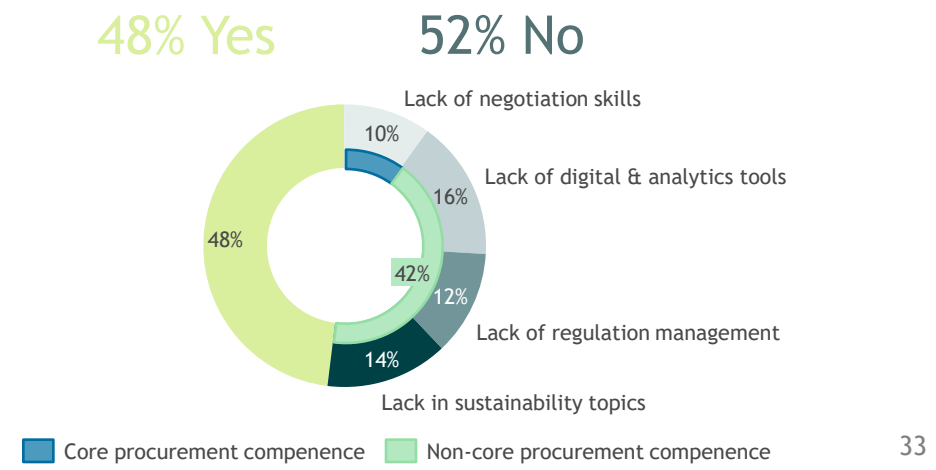
- Attracting and retaining the right talent remains one of the key challenges for companies, with its importance continuing to grow (29% of surveyed CPOs identified this as a top concern).
- Large companies seem to be more affected by the talent and skills gap than SMEs (65% vs 37%), highlighting the growing challenges big corporations face in attracting top talent.

42% of companies express a lack in Non-core Procurement competences

The lack of expertise in specific areas is a key challenge for Procurement teams. Surveyed companies focused particularly on improving the skills of their teams to better address the following topics:

- **Managing risk and enhancing supply chain resilience** (50%)
- **Achieving sustainability goals** (56%)
- **Ensuring compliance to regulations** (56%)

Does your Procurement team have the needed capabilities and expertise?



Impact leaders invest in skills, emphasizing transversal and soft skills through training programs, while achieving the right balance between internal resources and bringing in external expertise

“Enhancing Procurement efficiency goes hand in hand with **developing your own internal people by making sure they can receive training programs internally**. Striking the right balance between internal resources and bringing in external expertise when speed is required is essential. Keep in mind that you can't have everything perfect!”

Retail SME CPO

Large Construction
company CPO

“We believe that technical expertise and strong interpersonal skills are the foundation of a high-performing purchasing team. At [our company], we recognize the critical role of continuous learning and develop our internal network. **That's why we established [our company's] University, providing our buyers with tailored training on Procurement fundamentals**. Recently, in locations such as Ivory Coast and Australia, these programs have empowered our new buyers to quickly develop their skills.”

“I see **buyer agility as the key to our strategic purchasing transformation**. Our goal is to shift from a transactional role to a fully integrated business partner, driving both efficiency and long-term value for the company.”

Large Beverage and
Consumer Goods
company CPO



Technical expertise and category knowledge remain key drivers of success in Procurement performance.



Impact leader Procurement teams highlight the growing importance of **transversal and soft skills**, as Procurement increasingly has to **work closer with Business teams and integrate global challenges** such as decarbonization and geopolitics into its strategy.

AI and digital tools are underutilized despite being on the top of CPO's minds

What are currently the main three objectives of value creation for your Procurement organization?



$\frac{1}{4}$ of companies have not yet considered the implementation of GenAI in their Procurement operations and 52% of the those that have limit its use to increasing efficiency

- Risk management is also a strong focus for GenAI implementation (39%), highlighting its potential for mitigating uncertainties in supply chains.
- Large companies prioritize efficiency, while smaller firms face greater challenges in implementation and integration of this technology (-10 pts).

Digitalization & AI is the 2nd main priority for value creation according to Procurement teams

- Digitalization is a top priority for 53% of large organizations, but only 22% of small companies have implemented digital Procurement solutions so far.
- Digital tools remain underutilized, with only 31% of companies leveraging them significantly to achieve sustainability goals, and just 33% using them to drive innovation.

Where will GenAI create most value for Procurement?



Impact leader Procurement teams unlock digital potential through master data quality and cross-functional integration

“We are moving into a world where making decisions based on data is crucial, requiring us to not only rely on data, but also effectively connect it with AI to drive strategic initiatives. The ability to access and utilize the right data at the right time has become fundamental in Procurement. Additionally, we must develop scalable solutions that not only enhance efficiency but also remain flexible enough to adapt to changing business needs.”

Large Automotive
company CPO

Large Automotive
Equipment company
CPO

“Data and AI are at the heart of our digital transformation. By 2026, we will implement Ivalua, eliminating manual processes and fully integrating Procurement into SAP S/4HANA. Success will require our teams to develop digital literacy, leveraging data and AI for strategic supplier management, and effective risk mitigation in a rapidly evolving environment.”

“One of our major limitations is the lack of a unified Procurement platform across our group. With multiple ERP systems, we face data transparency issues, making it difficult to consolidate and analyse spending efficiently. A common digital platform and AI integration would drastically improve efficiency, allowing us to focus on strategic priorities rather than operational bottlenecks.”

Automotive
Equipment SME CPO



The primary bottleneck for AI-driven Procurement is data availability and quality.



While they fully recognize the need for AI, CPOs often lack a concrete understanding of its potential impact or tend to underestimate how it could enhance their operations.



Agenda

1. Executive synthesis

CEO challenges & strategy - a BCG study	5
CPO answers to company objectives - Inverto survey	6-7
Defining impact leaders	8
Immediate actions for CPOs	9-10

2. Survey core insights

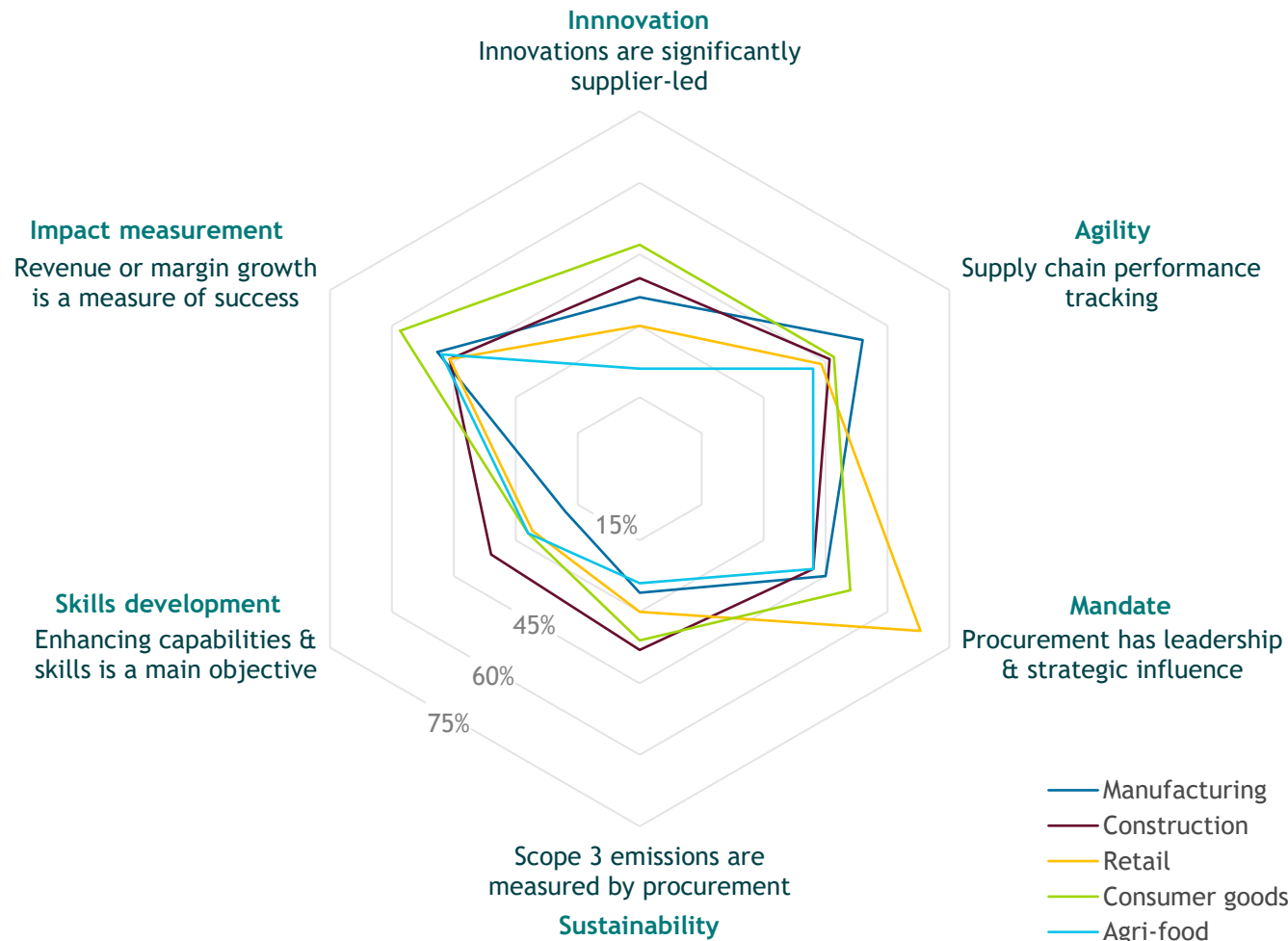
Taking a proactive role in EXCOM to deliver tangible revenue growth	13-16
Going beyond cost savings impact by making innovation a priority	17-21
Fostering agility to thrive in an ever-changing market environment	22-24
Leveraging sustainability efforts to create value	25-27
Bridging the reporting gap to reach company's headlines	28-31
Prioritizing hard, soft and digital skills development	32-36

3. Country & industry benchmarks

37-39

Industry comparison | Manufacturing, Construction, Retail, Consumer goods, Agri-food

Key specificities of Procurement functions across Industries



1 Context & rationale

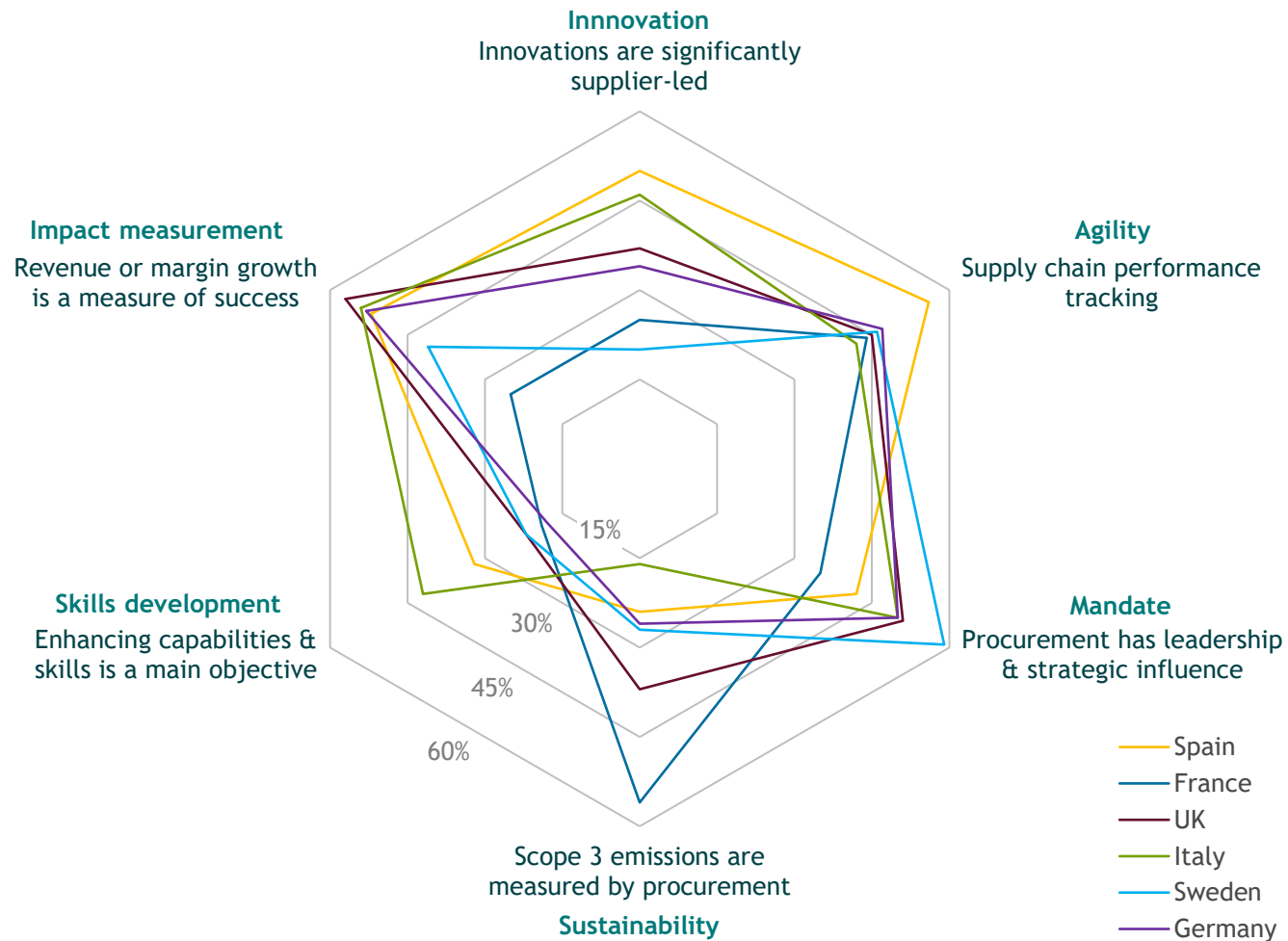
- Survey answers from CPOs were received from the companies in the following sectors: **Manufacturing** (76 answers), **Construction** (50), **Distribution & Retail** (50), **Consumer goods** (45), **Agri-food** (33), and six other industries (81).
- For different **performance categories**, represented by one survey answer, certain industries foster more impact leaders.

2 Industry takeaways

- Manufacturing:** Teams are more advanced than average on agility topics and more apt to communicate with company-owned KPIs. However, their skills development is lacking and could explain their underperformance on sustainability.
- Construction:** Teams are keen to upskill and seem more equipped to tackle evolving topics like sustainability and innovation. However, they need to further communicate on these strengths to gain strategic influence.
- Retail:** Teams show strong leadership and influence within their organizations, despite rare reporting of company-owned metrics and less dedication to upskilling.
- Consumer goods:** Teams are able to effectively communicate performance cross-functionally, and display strong oversight of the supply chain through monitoring and supplier-led innovation - contributing, in part, to their leadership and influence.
- Agri-food:** Teams are upskilling at higher rates than other industries, which will enable stronger confidence and leadership, as well as further contribution to innovation and sustainability.

Country comparison | France, UK, Spain, Italy, Sweden, Germany

Key specificities of Procurement functions across Europe



1 Context & rationale

- Survey answers from CPOs were received from **France** (63 answers), the **UK** (51), **Spain** (50), **Italy** (50), **Sweden** (41), **Germany** (38) & 11 other countries (42).
- For different **performance categories**, represented by one survey answer, certain countries foster more impact leaders.

2 Country takeaways

- France:** teams contribute most strongly to company-wide efforts on sustainability, but are behind on company-owned success metrics and innovation sourcing with suppliers.
- UK:** teams have strong strategic influence, in part thanks to reliance on company-owned success metrics, however supply chain performance tracking is less widespread.
- Spain:** teams effectively track supply chain performance and are therefore able to benefit from supplier-led innovation, but are lacking in sustainability practices and should upskill in this field.
- Italy:** teams hold upskilling and capability enhancement in strong regard, which reflects in their higher-than-average use of company-owned metrics. Scope 3 emissions tracking is, however, remarkably low.
- Sweden:** teams benefit from leadership and strategic influence despite sparse tracking of company-owned metrics.
- Germany:** teams are behind on building new skills and capabilities, yet they manage to be relatively proactive and cross-functional. Supplier innovation sourcing is scarce.

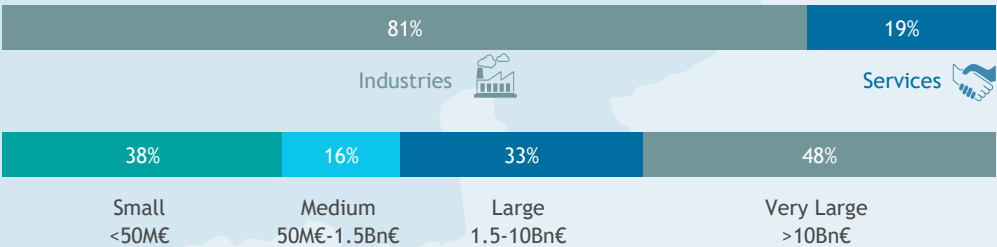
Country overview | France | Procurement is largely positioned as a contributive partner in board discussions, with its efforts centered on achieving cost savings

63
Responses
(out of 335)

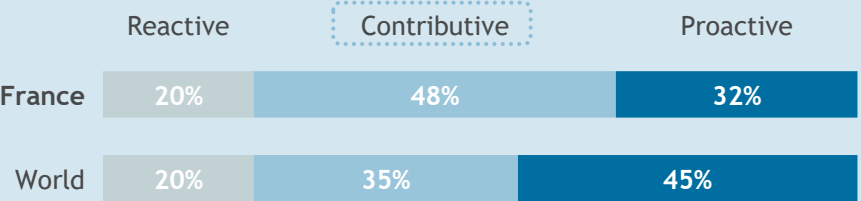
57%
Chief Procurement
Officers
40% Procurement directors
3% CEO

6
CPOs interviewed

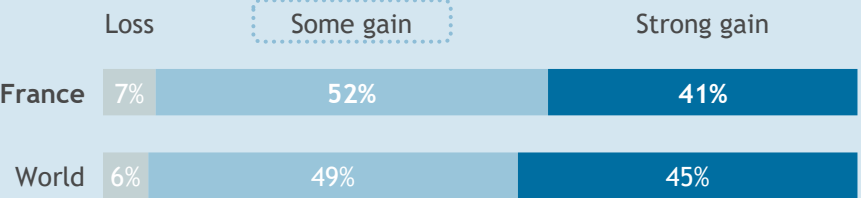
Company size & industry profile



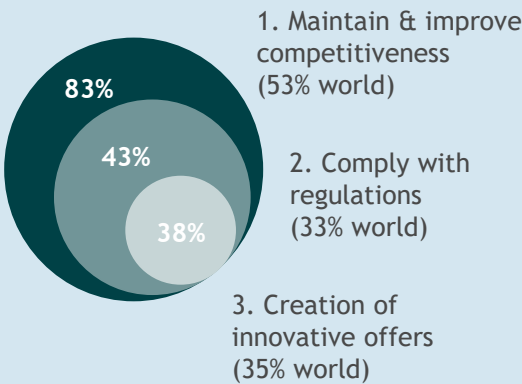
In which way does Procurement position itself within the board ?



How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?



How does Procurement contribute to master your challenges?

- 1 Deliver cost savings (73%)
- 2 Mitigate Supply chain risks (52%)
- 3 Support ESG compliance on scope 3 (51%)
- 4 Drive digital transformation (40%)

Country analysis | France's Procurement stands out in performance measurement and sustainability, but faces challenges in skills development and innovation

Key specificities of France's Procurement functions



1 France excels in a results-driven mindset, with strong recognition of procurement's impact on EBITDA

- France significantly outperforms the average in measuring procurement's impact on EBITDA (65% vs. 26%)
- It also leads in tracking recurring savings (70% vs. 39%), reflecting a strong results-driven culture

2 People and skills are a huge issue for French procurement teams

- A much larger share of respondents in France report a lack of procurement capabilities (78% vs. 46%), highlighting a major talent gap
- Similarly, digital skill shortages are more prevalent in France (41% vs. 19%), suggesting a need for targeted upskilling

3 France shines by its high level of engagement for sustainability

- Sustainability is a higher strategic priority in France (46% vs. 29%), confirming a stronger ESG commitment
- France also leads in Scope 3 emissions measurement (56% vs. 28%), showing maturity in environmental impact tracking

4 Innovation is neither a priority nor a strategic focus for procurement teams

- France lags behind in procurement's contribution to innovation, with 0% citing involvement vs. 38% on average
- The use of GenAI for procurement innovation is also lower (16% vs. 37%), suggesting slow adoption of emerging technologies

Country overview | Spain | Procurement is highly proactive at the board level, with a clear emphasis on digital transformation and supplier development

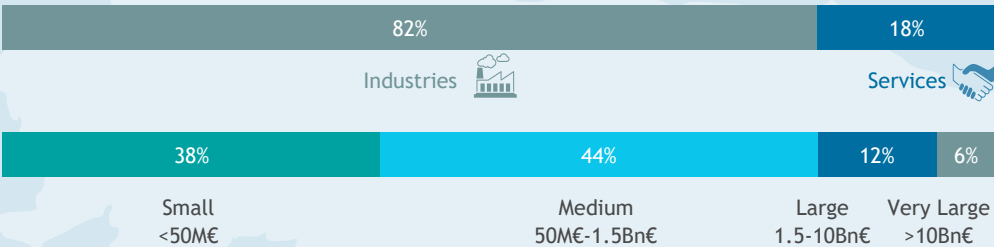
50

Responses (out of 335)

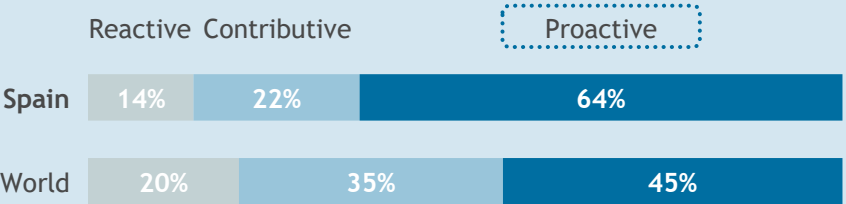
66%

Chief Procurement Officers
34% Procurement directors

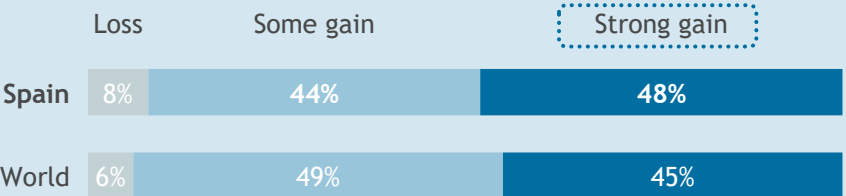
Company size & industry profile



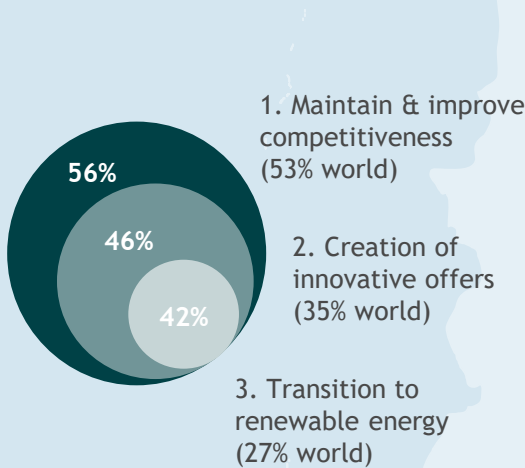
In which way does Procurement position itself within the board ?



How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?



How does Procurement contribute to master your challenges?

- 1 Drive digital transformation (62%)
- 2 Find and develop new suppliers (56%)
- 3 Deliver cost savings (56%)
- 4 Support innovation process (46%)

Country analysis | Spain's procurement leads in supplier relationships and digitalization, driven by strong innovation efforts and cross-functional influence

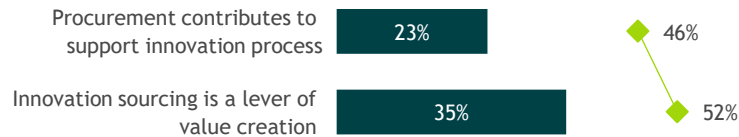
Key specificities of Spain's Procurement functions



Strategic influence



Innovation



Supplier's Relations



Digital expertise



■ Average (excl. SPA) ◆ SPA

1

Procurement plays a cross-functional role, although strategic influence remains below expectations

- Spain significantly outperforms in cross-functional procurement involvement (86% vs. 52%), reflecting strong integration of procurement into broader strategic initiatives
- However, leadership influence still lags slightly behind the average (42% vs. 48%), suggesting room for stronger positioning at the top

2

Spanish procurement teams demonstrate strong commitment to innovation as a lever for improved performance

- Spain outperforms the average in both procurement's support for the innovation process (46% vs. 23%) and in leveraging innovation sourcing as a value driver (52% vs. 35%), highlighting a strong commitment to driving innovation both internally and through external sources

3

An extended supplier base and active monitoring of supplier relationships are key priorities

- Spain shows a strong commitment to supplier relationship management, with higher engagement in both developing new suppliers (56% vs. 35%) and ongoing monitoring (50% vs. 36%), pointing to a more proactive and strategic supplier management approach

4

Digitalization and AI are prioritized as key enablers to address procurement challenges

- Spain leads the way in digital transformation and GenAI adoption in procurement (62% vs. 39% and 52% vs. 30%, respectively), underlining its strong focus on innovation and technological advancement to tackle procurement challenges

Country overview | United Kingdom | Procurement plays a predominantly proactive role at the board level, with a primary focus on mitigating supply chain risks

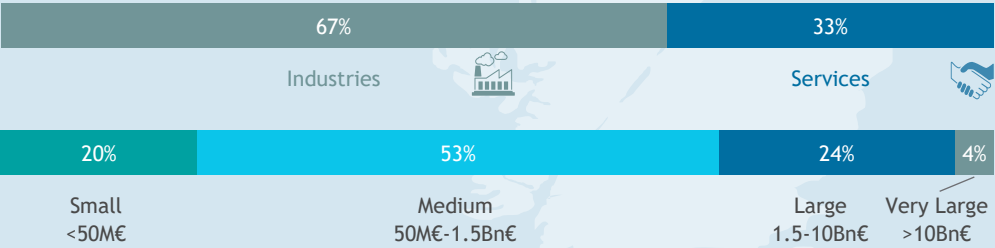
51

Responses (out of 335)

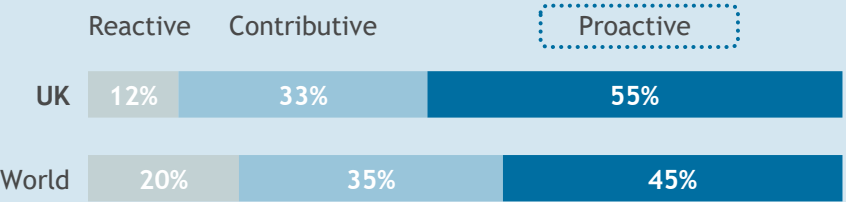
69%

Chief Procurement Officers
31% Procurement directors

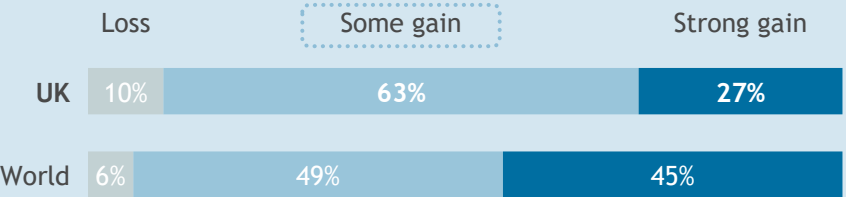
Company size & industry profile



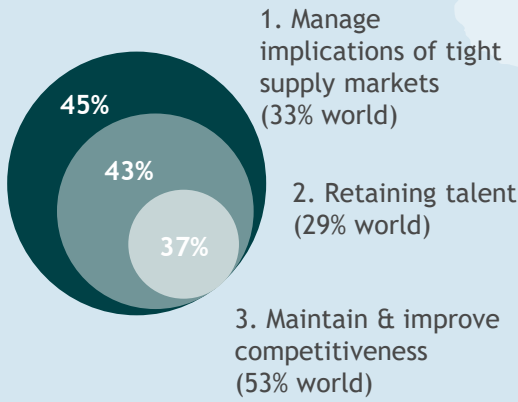
In which way does Procurement position itself within the board ?



How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?

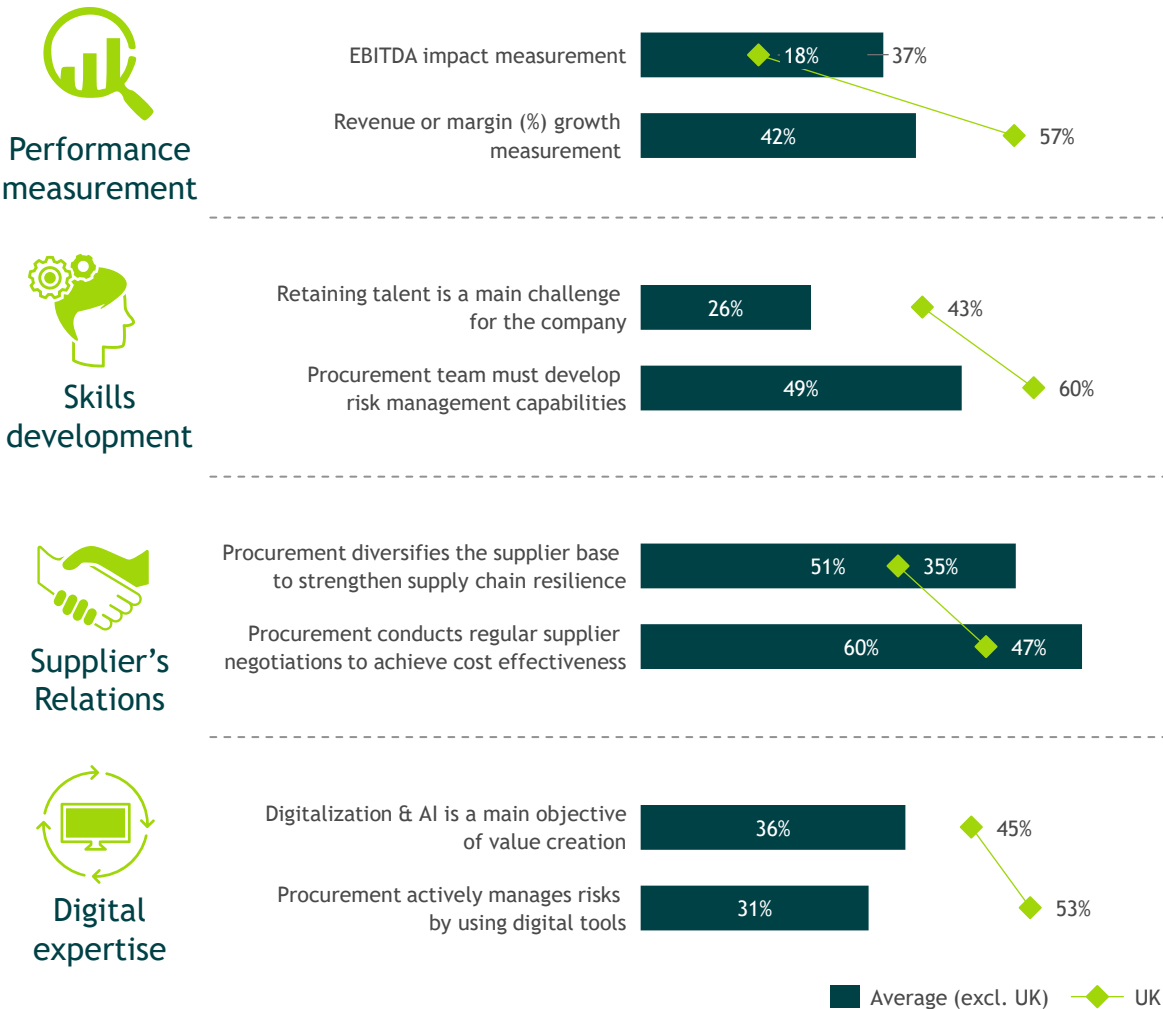


How does Procurement contribute to master your challenges?

- 1 Mitigate supply chain risks (53%)
- 2 Drive digital transformation (45%)
- 3 Find and develop new suppliers (43%)
- 4 Deliver cost savings (39%)

Country analysis | United Kingdom's procurement prioritizes digital risk management and revenue growth tracking, but faces gaps in talent retention and supplier engagement

Key specificities of UK's Procurement functions



1 Greater focus on revenue and margin growth over EBITDA impact

- UK procurement teams track EBITDA impact less rigorously, with only 18% measuring it (vs. 37% average)
- However, they show better performance in tracking revenue and margin growth (57% vs. 42%), indicating a stronger focus on top-line contribution

2 Retaining talent and upskilling remain key challenges for UK companies

- Talent retention is a bigger challenge in the UK (43% vs. 26%), highlighting workforce stability concerns
- UK places greater focus on building supply chain risk management capabilities (60% vs. 49%), showing proactive development efforts

3 UK shows weaker performance in supplier engagement and lacks diversity in its supplier panel

- UK trails in supplier base diversification (35% vs. 51%), indicating a potential risk in supplier dependency
- Regular supplier negotiations are also less frequent in the UK (47% vs. 60%), suggesting fewer efforts to drive cost optimization through this lever

4 Digitalization is a priority for UK Procurement teams, particularly for supply chain risk management

- UK teams see digitalization and AI as a core value creation priority (45% vs. 36%), suggesting digital efforts are strategic for value creation
- UK places more focus on managing risks through digital tools (53% vs. 31%), reflecting strong digital risk maturity on this topic

Country overview | Italy | Procurement takes a proactive role in the board discussions, with a clear focus on identifying and developing new suppliers

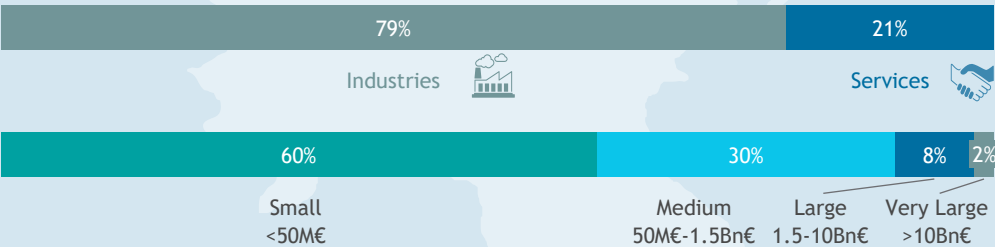
50

Responses (out of 335)

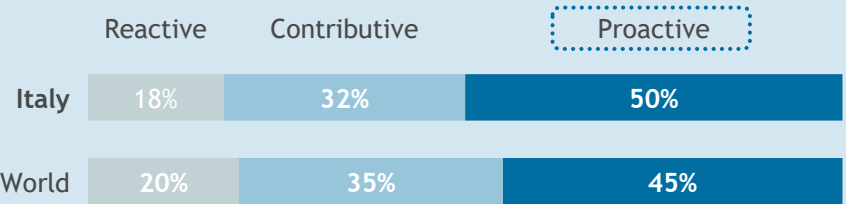
80%

Chief Procurement Officers
20% Procurement directors

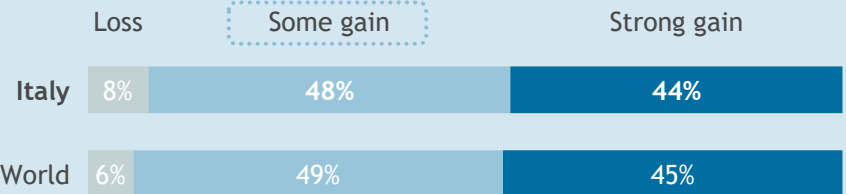
Company size & industry profile



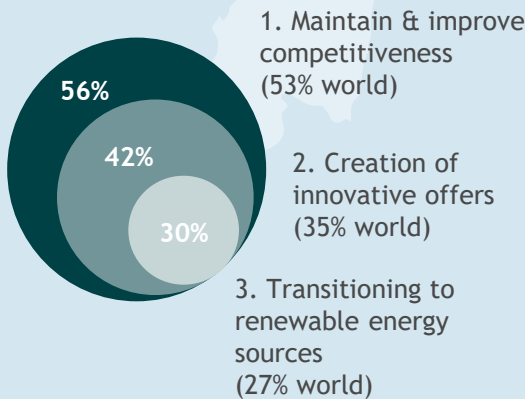
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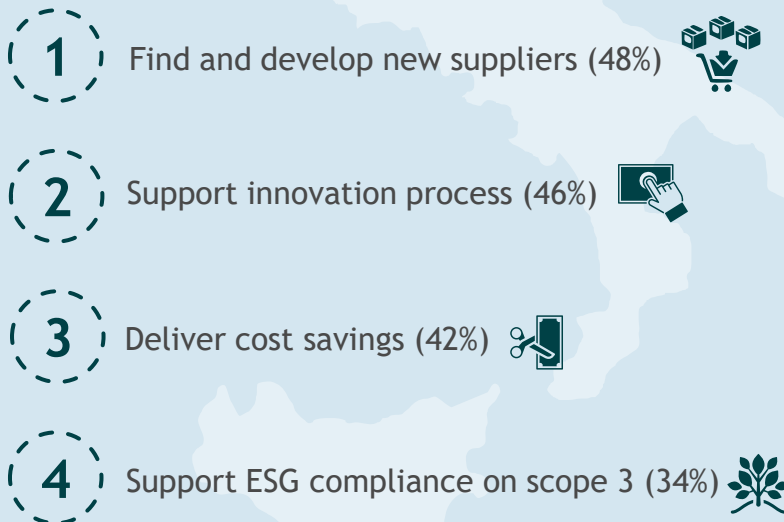
How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?

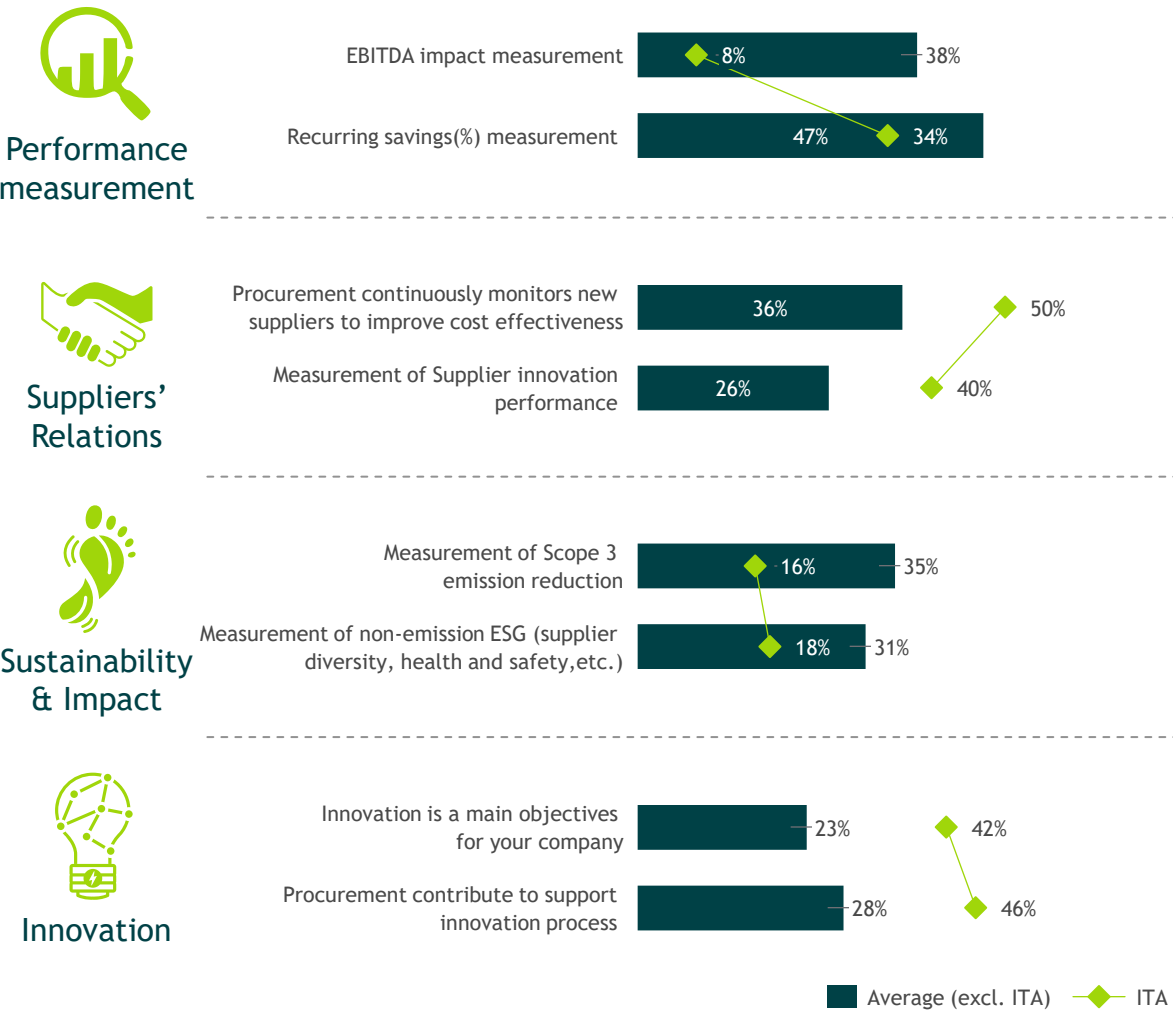


How does Procurement contribute to master your challenges?



Country analysis | Italy's Procurement shows strong performance in innovation and supplier monitoring, but still lags behind in ESG commitment and financial impact tracking

Key specificities of Italy's Procurement functions



- 1 Financial performance is tracked less closely, particularly on company-owned KPIs such as the EBITDA impact of procurement**
 - Only 8% of Italian companies measure the EBITDA impact of procurement, compared to 38% on average, showing a major gap in financial performance tracking
 - Meanwhile, recurring savings measurement is also lower in Italy (34% vs. 47%)
- 2 Procurement demonstrates a stronger supplier monitoring and innovation measurement**
 - Supplier monitoring for cost-effectiveness is more structured in Italy (50% vs. 36%), reflecting a greater focus on supplier performance tracking
 - Italy also excels in supplier innovation measurement (40% vs. 26%), demonstrating a more advanced approach to evaluating supplier contributions
- 3 Reduced ESG commitment, with limited emphasis on emissions tracking and supplier diversity initiatives**
 - Scope 3 emissions measurement is a lower priority in Italy (16% vs. 35%), highlighting a gap in carbon footprint tracking
 - Non-emission ESG metrics receive less attention (18% vs. 31%), indicating room for improvement in sustainability efforts
- 4 Innovation is a key contribution of Italy procurement teams**
 - Innovation is significantly more emphasized in Italy, with 42% identifying it as a main objective compared to 23% on average
 - Similarly, 46% of Italian companies say procurement supports the innovation process, above the 28% average, reflecting a more innovation-driven procurement culture

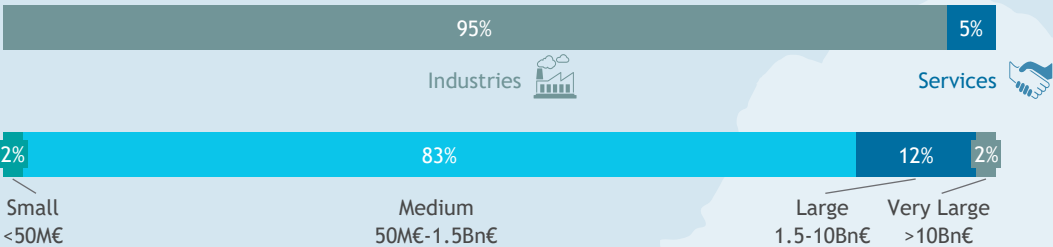
Country overview | Sweden | Procurement is largely positioned as a contributive partner in board discussions, with its efforts centered on mitigating supply chain risks

41
Responses
(out of 335)

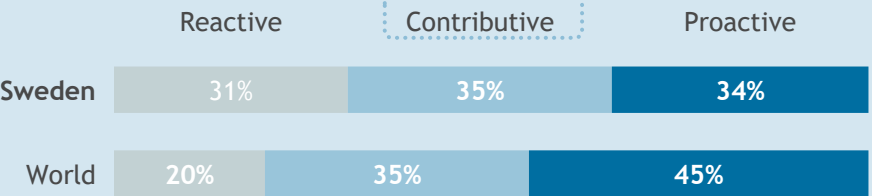
90%
Chief Procurement
Officers
10% Procurement directors

4
CPOs interviewed

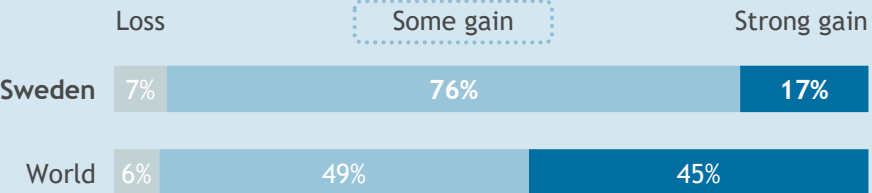
Company size & industry profile



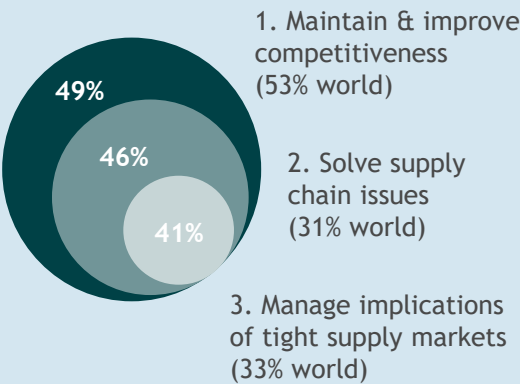
In which way does Procurement position itself within the board ?



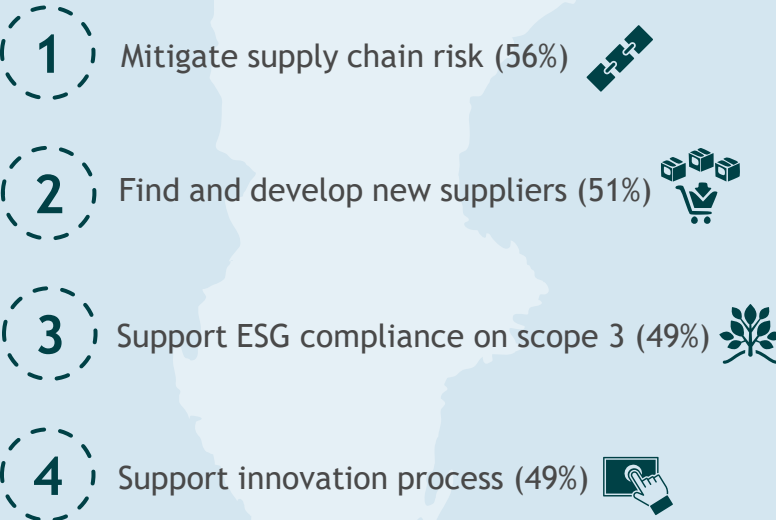
How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?

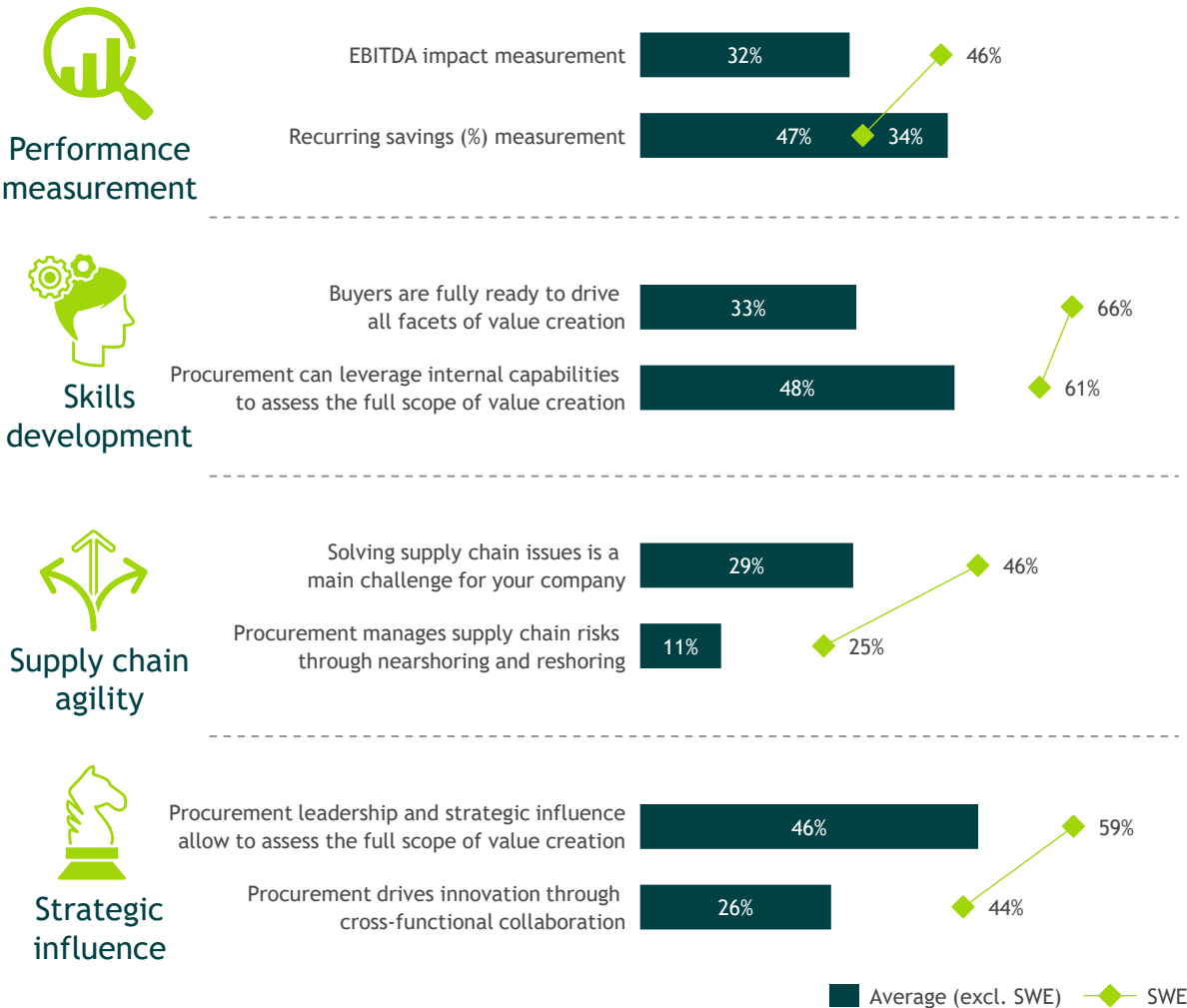


How does Procurement contribute to master your challenges?



Country analysis | Sweden's procurement is highly skilled and supported by resilient supply chain practices, enabling stronger strategic influence across organizations

Key specificities of Sweden's Procurement functions



- 1

Sweden places less emphasis on procurement-specific KPIs and prioritizes EBITDA impact

 - 46% of Swedish companies measure EBITDA impact (vs. 32% average) suggesting that Sweden places stronger emphasis on company-owned metrics beyond just cost savings
 - Only 34% of Swedish companies track recurring savings
- 2

Sweden stands out for its highly skilled procurement teams

 - Swedish buyers are better equipped and trained to contribute strategically to create value (66% vs. 33%)
 - Sweden has stronger internal capabilities in understanding and leveraging procurement value (61% vs. 48%)
- 3

Solving supply chain issues is a key priority, with a stronger focus on reshoring and nearshoring

 - 46% of Swedish companies see solving supply chain issues as a major challenge reflecting Sweden's heightened awareness to complex supply chain disruptions
 - Sweden is more proactive in localizing or regionalizing supply to mitigate global risks (25% vs. 11%)
- 4

Procurement teams demonstrate stronger leadership and influence within their companies

 - 59% of Swedish companies use procurement leadership to assess value creation (vs. 46% average) reflecting a stronger strategic roles within organizations
 - Cross-functional collaboration is seen in 44% of Swedish companies (vs. 26% average) indicating a more integrated approach in Sweden

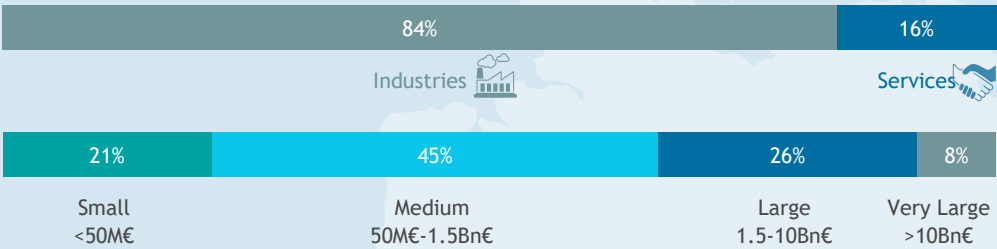
Country overview | Germany | Procurement has significantly gained importance over the past five years, with a strong focus on mitigating supply chain risks

38
Responses
(out of 335)

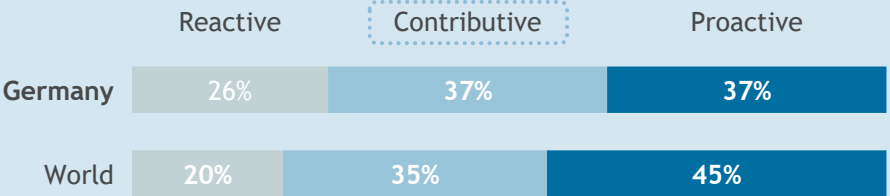
70%
Chief Procurement
Officers
30% Procurement directors

2
CPOs interviewed

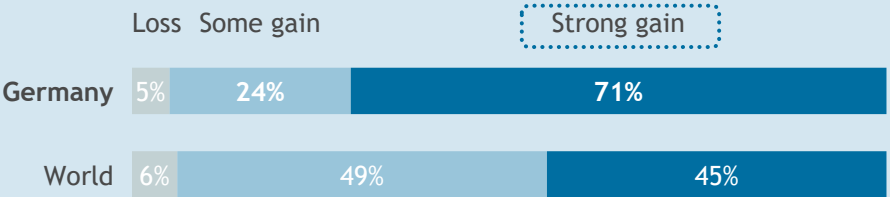
Company size & industry profile



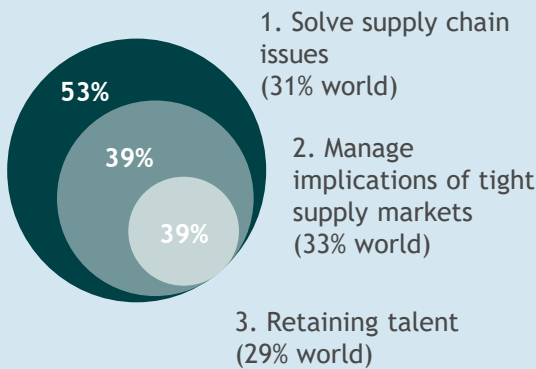
In which way does Procurement position itself within the board ?



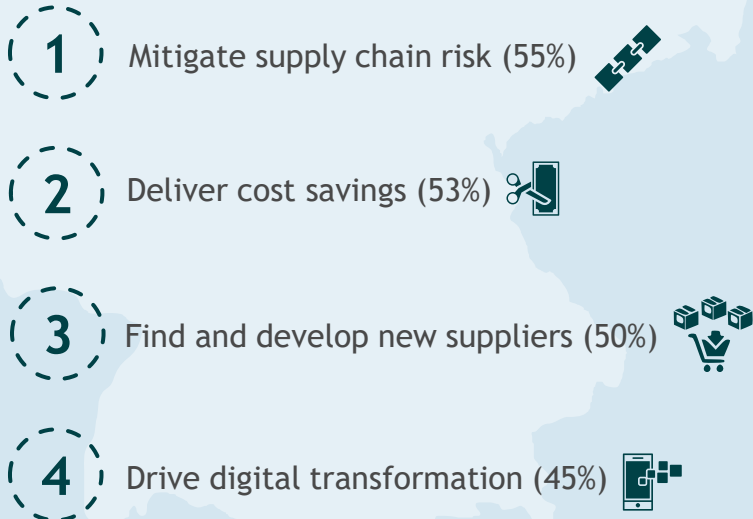
How has the significance of Procurement changed over the last 5 years ?



What are currently the main challenges for your company ?

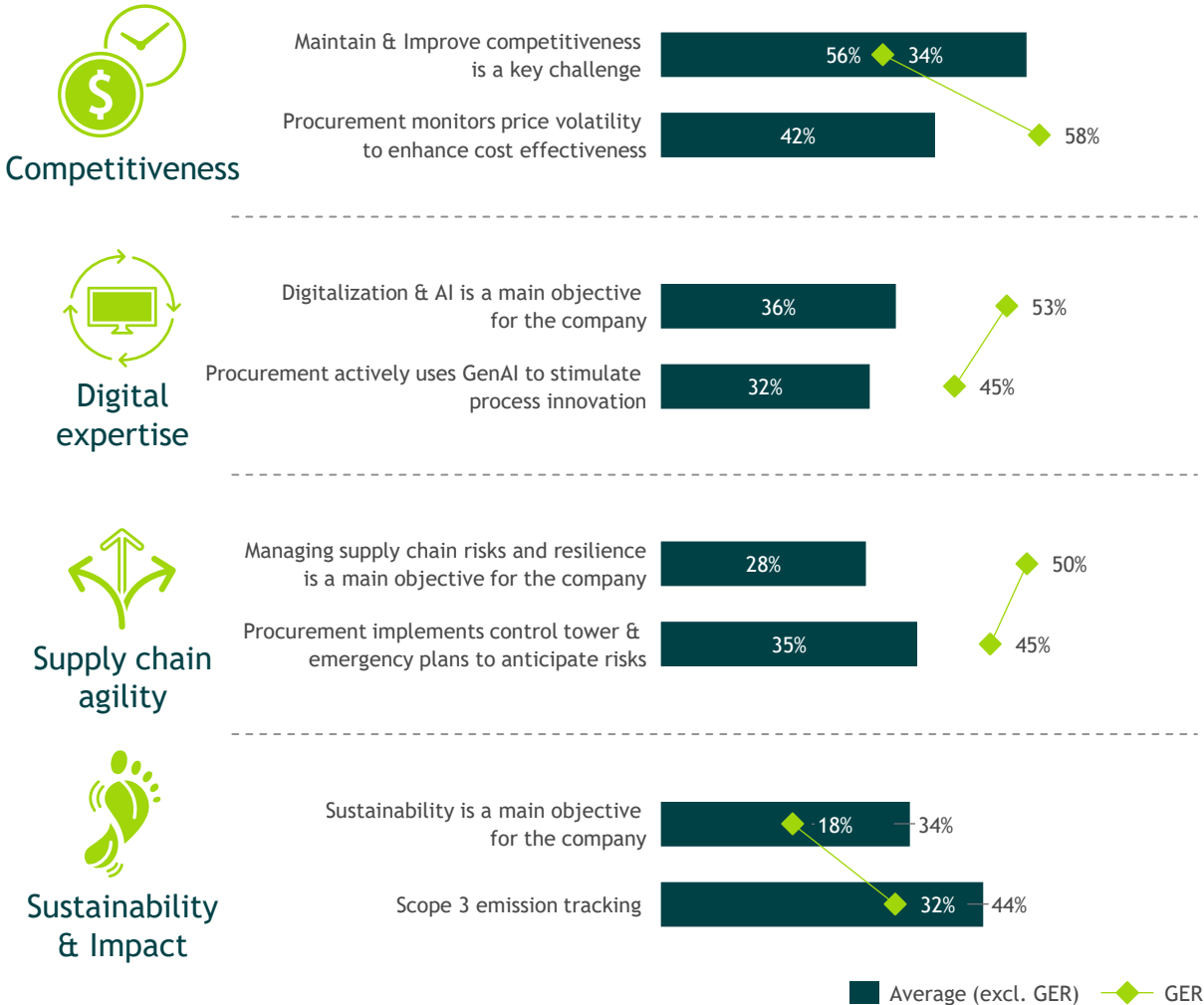


How does Procurement contribute to master your challenges?



Country analysis | Germany's procurement plays a key role in enhancing competitiveness by prioritizing digital tools and strengthening risk management, but still lags behind in ESG

Key specificities of Germany's Procurement functions



- Competitiveness remains a key strength for Germany, driven in part by its strong ability to anticipate and manage price volatility**
 - Germany sees maintaining competitiveness as less of a challenge (34% vs. 56%), reflecting its established strength in this area
 - Germany's stronger focus on price volatility reflects a disciplined and tactical approach to procurement cost control
- Digitalization and AI development are top priorities, with a strong emphasis on accelerating process innovation**
 - Germany shows a clear ambition to modernize procurement through digital transformation (53% vs. 36%)
 - 45% use GenAI to drive procurement process innovation, reflecting a growing commitment to leveraging emerging technologies for operational efficiency
- German procurement teams prioritize risk management, leveraging control towers and emergency planning**
 - Germany places significantly more emphasis on building resilient supply chains (50% vs. 28%), likely influenced by recent disruptions
 - Control towers and emergency plans are seen as good levers to anticipate and fix risks
- Sustainability, particularly Scope 3 emissions tracking, remains a lesser priority for German procurement teams**
 - Sustainability appears to be a lower priority in Germany's procurement strategy at this stage (18% vs. 34%)
 - Only 32% track Scope 3 emissions, suggesting possible improvement in extending sustainability efforts

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