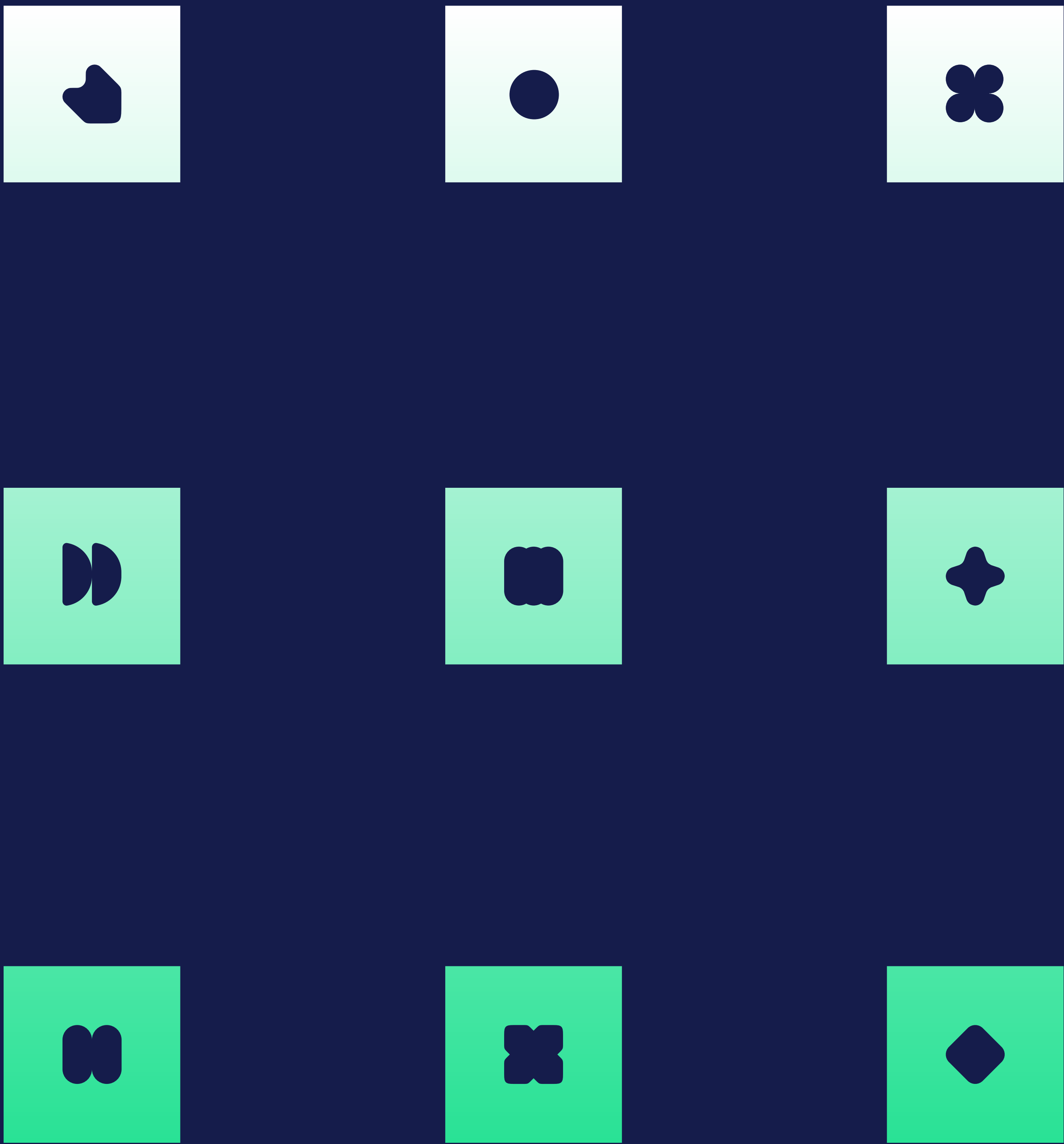
2026

The State of Nordic Procurement Report



What's inside

Opening Remarks

Procurement influences most of a company's cost base. Yet we've never had a shared picture of the function across the Nordics: how mature it is, and what the best teams do differently.

So we built one, together with EY and Silf Competence. This report puts together two things that rarely sit side by side. What 156 procurement leaders told us about their work, and what €41 billion of real spend data shows.

Here's the short version. Ask procurement leaders what holds them back, and many say the same two things. Not enough people, and not enough mandate to shape decisions early and to be heard at the top.

This report shows why it's hard to get both, and it comes down to proof. It's difficult to build a case for more people or more authority when you can't fully prove what you deliver. A quarter of teams don't track their savings against a target. Most spend can't be tied to a contract, so no one can say whether negotiated terms are being used. And the technology to change either is the weakest part of the function.

The mandate follows the evidence. You earn it by showing the value you deliver and proving you have a grip on your spend, and for most of the industry, that proof isn't there yet.

The good news is that the teams already ahead show exactly what this looks like. They set savings targets and track them. They know how much of their spend their contracts cover. And they reach for better tools instead of more people.

We're already seeing that the teams who get these first steps right are the ones succeeding with what comes next. We hope this report helps you become one of them.

Sigbjørn Nome

CEO & Co-founder at Ignite

“Through dedicated procurement functions, organizations demonstrate a clear ambition to manage third-party spend in a professional, strategic manner. But this report, consistent with our experience, shows procurement is often not enabled by the other key operating models required for success, such as a strong mandate, cross-functional processes, capacity, and technology support. Consequently, significant value remains unrealized. This is a striking paradox, because the investment required is modest and low risk. Our perspective is that many organizations underestimate both the value potential of procurement and don’t fully understand the requirements for success. Realizing procurement's full potential requires an integrated approach spanning governance, processes, capabilities and capacity, and technology.”

Thomas Haver
Partner at EY

“One of the most striking findings in this study is the gap between what procurement teams identify as their biggest challenge and where they choose to invest. Nearly half say that lack of people or capability is holding them back, yet only a small minority prioritize capability development. In a more volatile environment, capability is becoming a resilience factor. Procurement teams need the skills and confidence to adapt, make better decisions, and use new technology as conditions change. Building capability is no longer simply about developing people — it is about building the capacity to navigate change and deliver business value over time.”

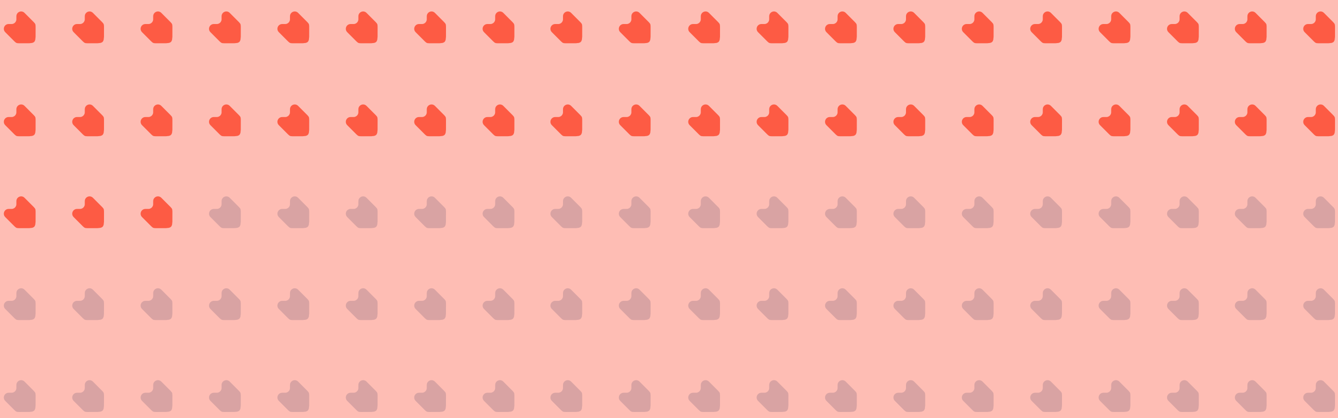
Sofia Andersson

CEO at Silf Competence

43/100

The average Nordic procurement function sits just below the midpoint of the Nordic Procurement Maturity Index. Tools is the weakest of the 5 dimensions.

Findings



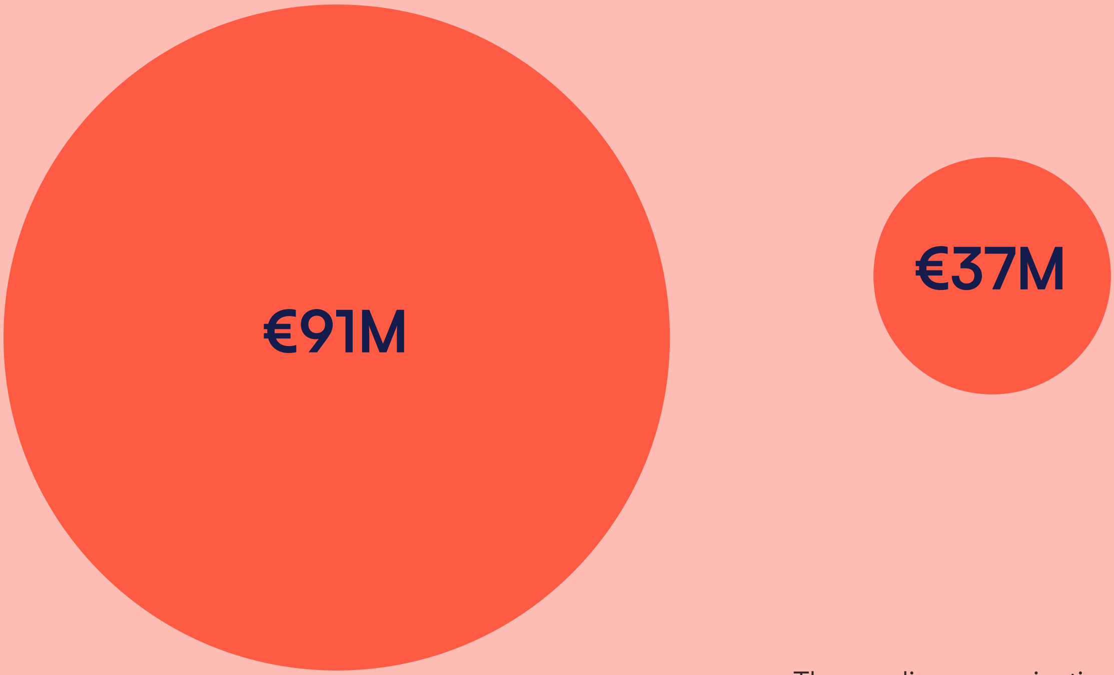
at a glance

40%

of procurement teams have no formal savings target, even though cost reduction is their most common priority.

~23%

The median organization can tie about 23% of its spend to an active contract. The top quartile reaches 44%.



The median organization manages €37M of spend per procurement employee. The top quartile manages €91M.

29 days

The spend-weighted average payment term in the Nordics. Survey respondents rank payment terms near the bottom of their opportunity list.

77%

of teams are using or exploring AI, but only 15% have moved past experimentation. For most, the limit is the data underneath. AI can only be as good as the data it runs on.

About the data

156
procurement professionals surveyed

154
organizations in the spend benchmark

€41 billion
in analyzed spend

Every figure in this report is labeled with its source. The survey and the spend benchmark are 2 separate sources and never matched.

You can find the full methodology at the end of the report.

CHAPTER 1

The state of procurement

Who answered

156 procurement practitioners and leaders completed the survey.

56% manage more than €200M in annual procurement spend, and a third operates across multiple continents. Nearly two-thirds of functions report directly to the CEO or COO, and about a quarter reports to the CFO.

ROLE

47% Procurement leadership (Head of Procurement, VP/Director, CPO)

40% Category or Procurement Manager

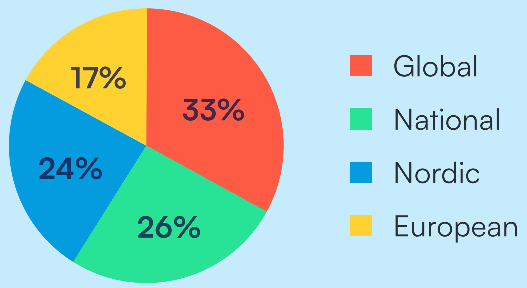
13% Other

PROCUREMENT REPORTS TO

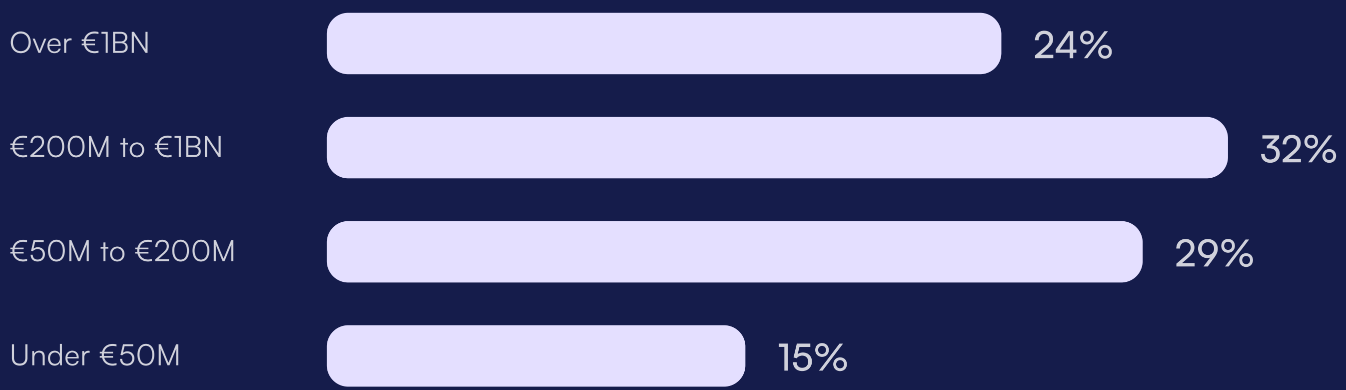
COO / Operations	32%
CEO / Managing Director	31%
CFO / Finance	23%
Other	14%

Excludes respondents who report to a dedicated procurement lead (a CPO or Head of Procurement). (Based on 132 respondents).

GEOGRAPHIC PRESENCE



ANNUAL PROCUREMENT SPEND



The Nordic Procurement Maturity Index

To see where the function stands, we score 5 parts of how procurement works. Each is a ladder with 5 rungs, from least to most developed:

1. **Strategy and mandate,** from placing orders to leading the value chain agenda
2. **Organization,** from local buying to full integration across business units and partners
3. **Process,** from case-by-case buying to integrated, cross-functional processes
4. **People and capabilities,** from mainly administrative skills to a function that attracts top talent
5. **Tools,** from Excel and email to a single integrated platform

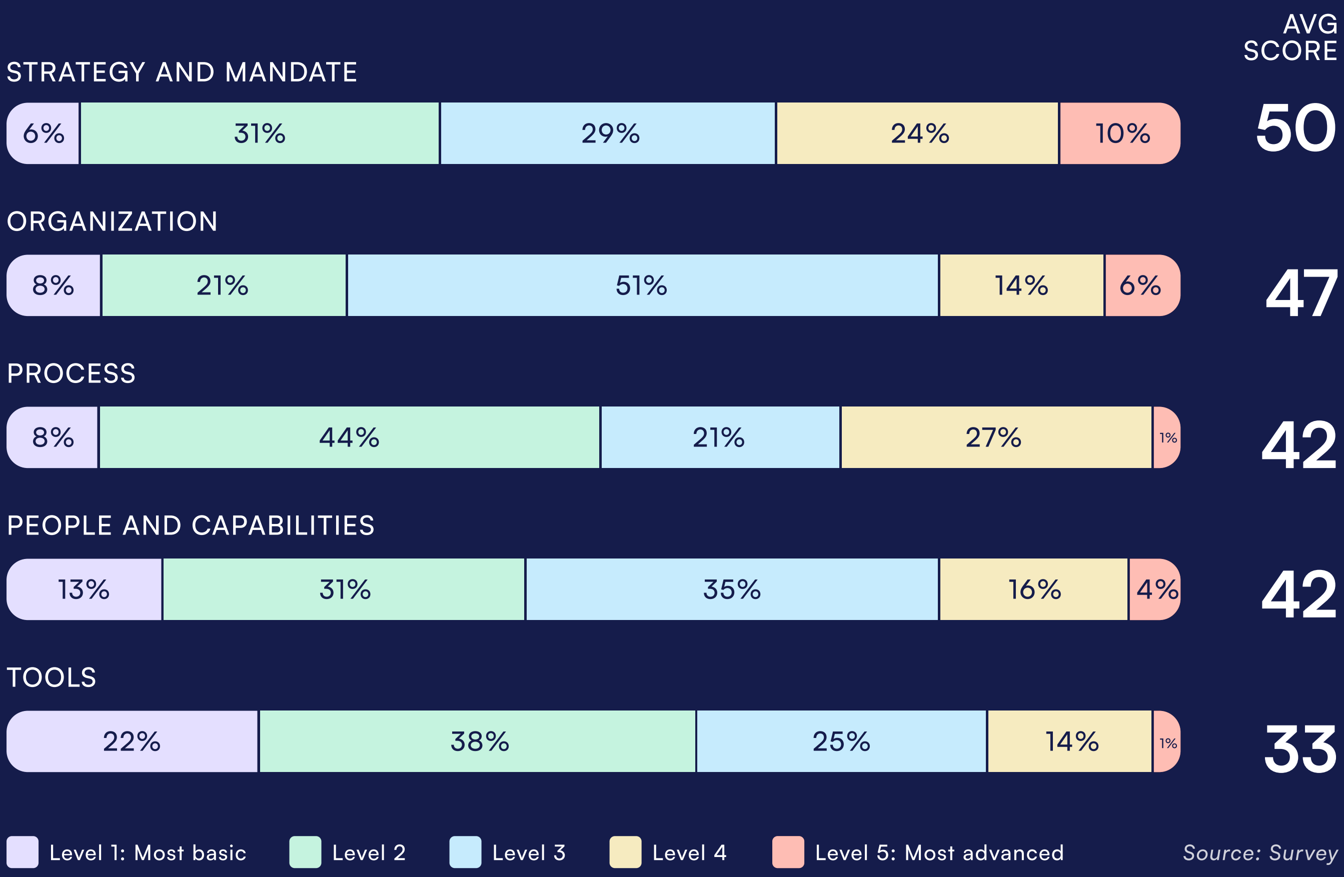
Each answer places a team on 1 of the 5 rungs, scored 1 to 5. To combine the 5 dimensions into a single, comparable number, we put each on a 0 to 100 scale, where rung 1 becomes 0 and rung 5 becomes 100, then average them.

So a score of 0 would mean the most basic level on every dimension, 100 the most advanced, and 50 sits squarely in the middle of the ladder. Think of it as where a team sits on the journey, useful mainly for comparison, against the market, or against yourself over time.

The 5 dimensions: Strategy leads, tools lag

Here's how teams place themselves on each ladder, and the score for each dimension.

FIGURE 1.1 | WHERE ORGANIZATIONS SIT ON EACH DIMENSION



Source: Survey

Strategy and mandate. Most teams have moved past admin. 6% describe procurement as purely administrative. But only a third have reached a strategic role or better, where category strategies are in place and procurement is recognized at the executive level. The largest group (31%) has a commercial mandate to negotiate but limited influence beyond it.

Score: 50

Organization. Centralized, but not yet integrated. Half of teams (51%) run a centralized or hybrid setup with clear category ownership. Only 1 in 5 has reached a center-of-excellence model or full integration across business units and partners.

Score: 47

Process. Standardized, but siloed. The largest group (44%) has a standard source-to-contract process where sourcing decisions still happen with little cross-functional input. About a quarter (27%) run integrated, cross-functional processes.

Score: 42

Tools. The weak point. More than 1 in 5 teams (22%) run procurement on Excel, email, and ERP, with no dedicated tools at all. The largest group (38%) has point solutions but limited overall spend visibility. Only 14% run one integrated platform.

Score: 33

People and capabilities. Practical skills, light on training. Two-thirds of teams sit at the 2 middle rungs: negotiation skills learned on the job, or category and supplier skills supported by training. Just 4% say procurement attracts top talent in their organization.

Score: 42

OVERALL INDEX AVERAGE	MEDIAN
43	45

Tools is the weakest dimension by a clear margin, with process and people close behind. Strategy and mandate leads, but at 50 even the strongest dimension is only halfway up the ladder. Procurement's mandate has grown faster than the tools, processes, and skills to act on it.

Where does your function sit?

The bottom quartile of the market scores below 29 on the index. The top quartile scores above 55.

Take the online self-assessment →
https://www.ignite.no/nordic-procurement-maturity-index

Maturity rises with international reach more than with size

Every spend band up to €1BN scores around 40 on the index. Only the very largest organizations pull ahead at 51. Reach has a bigger difference: domestic and Nordic-only organizations score 37—38, while European and global ones score 46—49.

Cost dominates priorities

We asked teams to name their top priorities for the year ahead.

Cost reduction sits far out in front, named by 60% of teams, well ahead of supplier performance and contract compliance behind it. Whatever else procurement is asked to do, cost is still what matters most.

2 things stand out further down the list. Talent development sits last at 6%. And AI and digital transformation rank low too, despite AI dominating industry conversation right now.

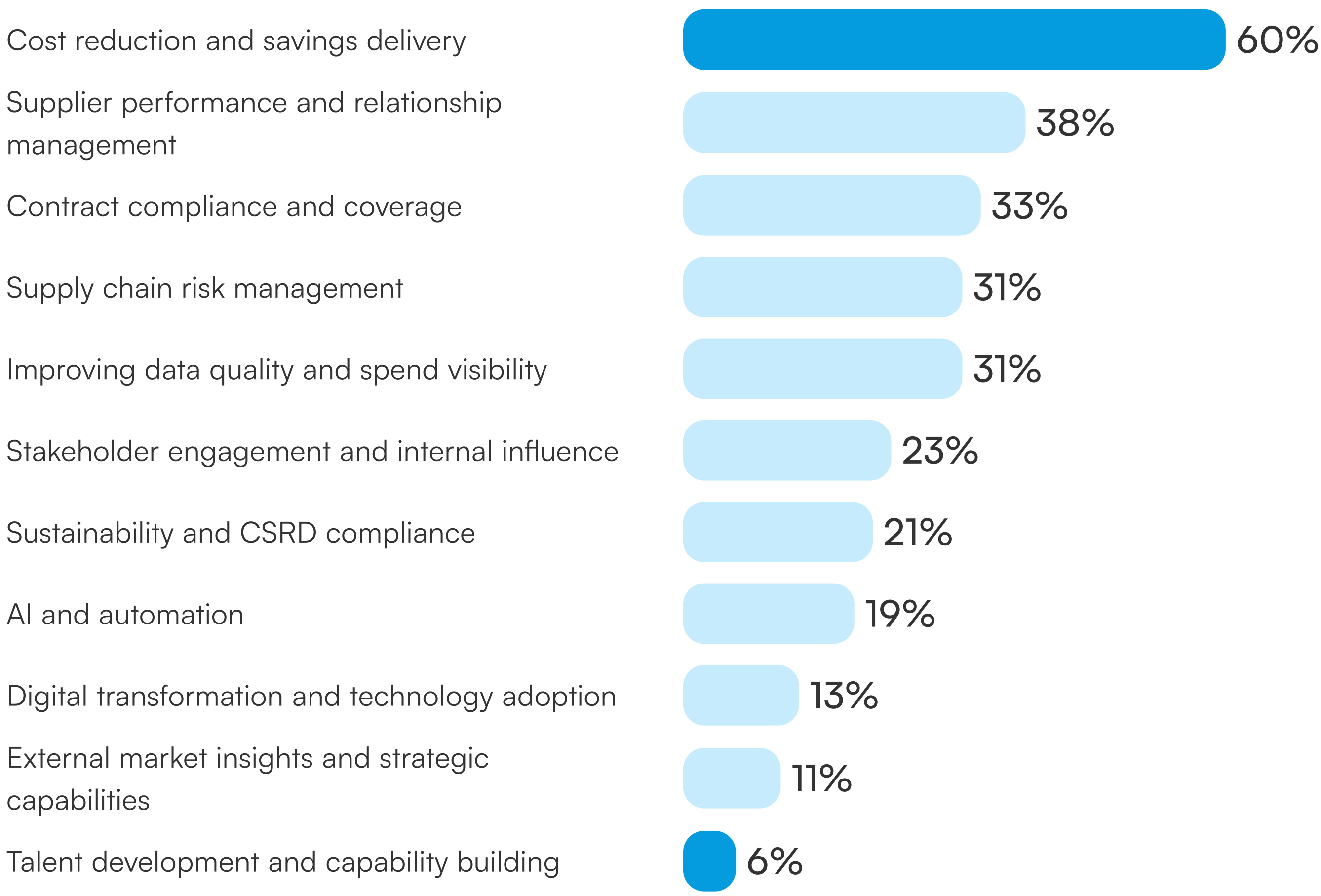


FIGURE 1.2 | WHAT PROCUREMENT TEAMS PRIORITIZE

Source: Survey

People, silos, and data hold teams back

We also asked what the biggest barriers are to delivering on those priorities.

FIGURE 1.3 | WHAT HOLDS PROCUREMENT TEAMS BACK

Source: Survey

People, silos, and data sit at the top, and budget near the bottom at 12%.

What's surprising is that not enough people or capability is the single biggest barrier teams name (49%). Yet talent development and capability building is the lowest priority of all (6%). The thing most teams say is holding them back is the thing almost none are actively working on.

"Procurement today is expected to contribute far beyond cost savings. We are increasingly asked to manage risk, support sustainability goals and strengthen supply chain resilience. This report confirms something many procurement leaders already experience: developing people and capabilities is essential to meeting these growing expectations.

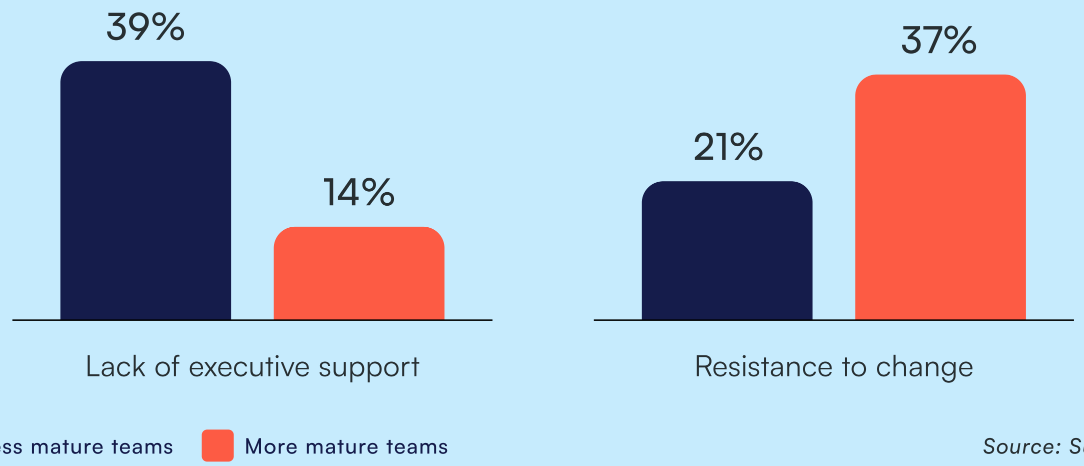
What I see in practice is that many procurement teams have the ambition to take on a more strategic role, but they are often constrained by limited resources and increasing complexity. Building the right capabilities across the organization is therefore not just a development initiative, it's a business necessity."

Anna Jasner
Country Head of Procurement
at Implenia

FINDING

The barrier changes as teams mature. First procurement works for a mandate, then against resistance to change.

FIGURE 1.4 | HOW BARRIERS CHANGE AS TEAMS MATURE



Source: Survey

Among less mature teams, the most distinctive barrier is lack of executive support. 39% cite it, against 14% of more mature teams.

Among more mature teams, it's resistance to change. 37%, against 21% of less mature teams.

Early on, the fight is to be given a mandate. Once a team has one, and has results to show for it, executive support stops being the problem. The fight shifts to getting the rest of the business to change how it works. The two halves of the market need different kinds of help.

CHAPTER 2

Visibility and control are still out of reach

Teams rank data and contracts as their biggest opportunities

We asked teams where the biggest untapped opportunity in their function sits. 2 answers rose above the rest: making better use of spend data, and getting more out of contracts (Figure 2.1).

FIGURE 2.1 | WHERE PROCUREMENT TEAMS SEE THE BIGGEST OPPORTUNITY

Source: Survey

The same theme shows up as a barrier. As we saw in Chapter 1, poor data quality is the third biggest obstacle teams name (42%), and fixing it is a priority for 31%.

Most teams have the basic tools in place, and the average team reports nearly 4 of them (Figure 2.2). But as Chapter 1 showed, only 14% run them as one integrated platform. Owning the tools isn't the same as having them work together.

74% Spend analytics and reporting	66% Contract management and repository
62% Supplier register and performance tracking	56% Sustainability and ESG data
47% Savings tracking and initiative management	45% Risk and compliance monitoring
26% eSourcing and tender management	6% None of the above

FIGURE 2.2 | THE TOOLS PROCUREMENT TEAMS HAVE

Source: Survey

"The amount of data available to procurement teams continues to increase. In my experience, the biggest challenge is rarely access to information, but understanding which insights actually deserve attention. At the same time AI tools and AI systems are developing rapidly creating completely new ways of understanding and interpreting data. Organizations that can separate signal from noise and combine strong capabilities with reliable data will be better positioned to navigate complexity and create lasting value."

Mattias Lintzen
Nordic Head of Purchasing
at SATS

The spend data shows how wide the gap is

Teams put spend data and contracts at the top of their list of biggest opportunities. The benchmark shows what both look like in numbers, starting with contracts, then the supplier base.

Only about a quarter of spend can be tied to a contract

Two-thirds of teams say they have a contract management system. Using the spend data, we looked at how much of their spend those contracts actually cover.

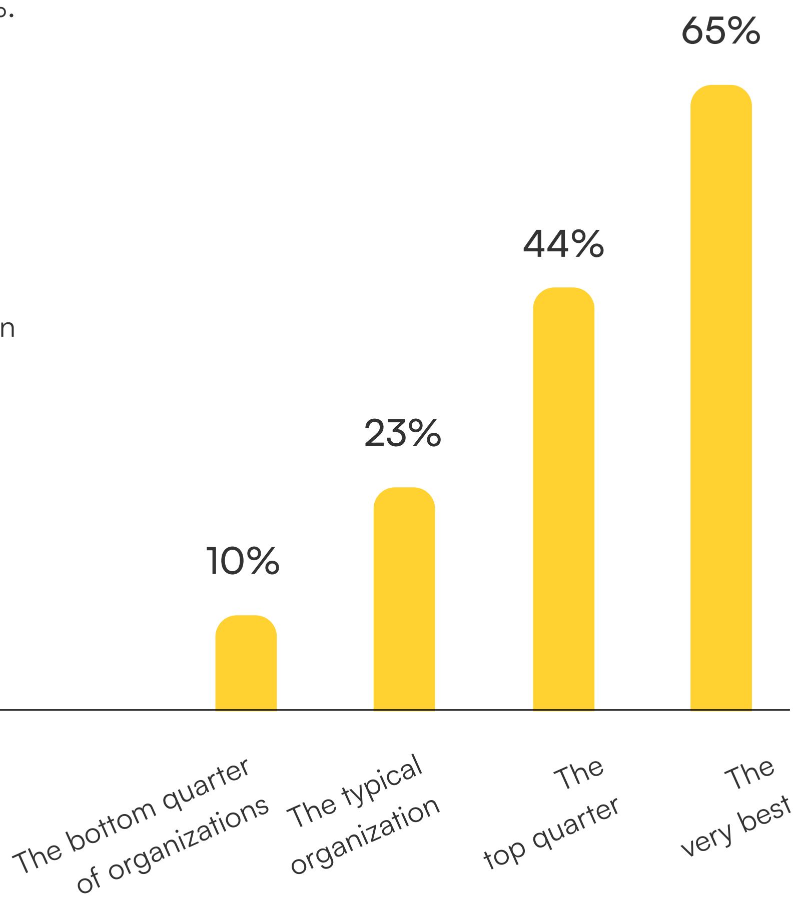
Not much, it turns out. Among the organizations where we can measure it, the typical one can tie just 23% of its spend to an active contract (Figure 2.3). The range is wide. The bottom quartile connects 10%, the top quartile 44%, and the very best 65%. Even the strongest performers leave more than a third of spend uncovered.

By industry, Public Sector leads at around 41% and Construction trails at around 11%. Construction's low number fits how it works. It's a lot of project-based, decentralized buying that's hard to tie back to contracts.

To be clear, Nordic teams use contracts every day, and the real number is likely higher than we can measure, since we can only count what's connected in the data.

But many teams don't have one place where contracts and spend meet: where you can see which spend is covered, which agreements are being used, and where purchases fall outside them.

FIGURE 2.3
HOW MUCH SPEND IS UNDER CONTRACT



Based on the 87 organizations where coverage can be measured.

Source: Spend data

Tail spend: Two-thirds of suppliers make up just 1% of spend

Recall that spend data was the number one opportunity teams named. The supplier base is a perfect example of what that data reveals once you look.

Start at the top of the list. Spend is concentrated in a small group. 46% of a typical organization's spend is from its top 10 suppliers, and 88% from its top 100.

Now look at the rest of the list. At the typical organization, 65% of all supplier relationships are tiny, under €10,000 a year. Put together, all of them add up to about 1% of spend (Figure 2.4).

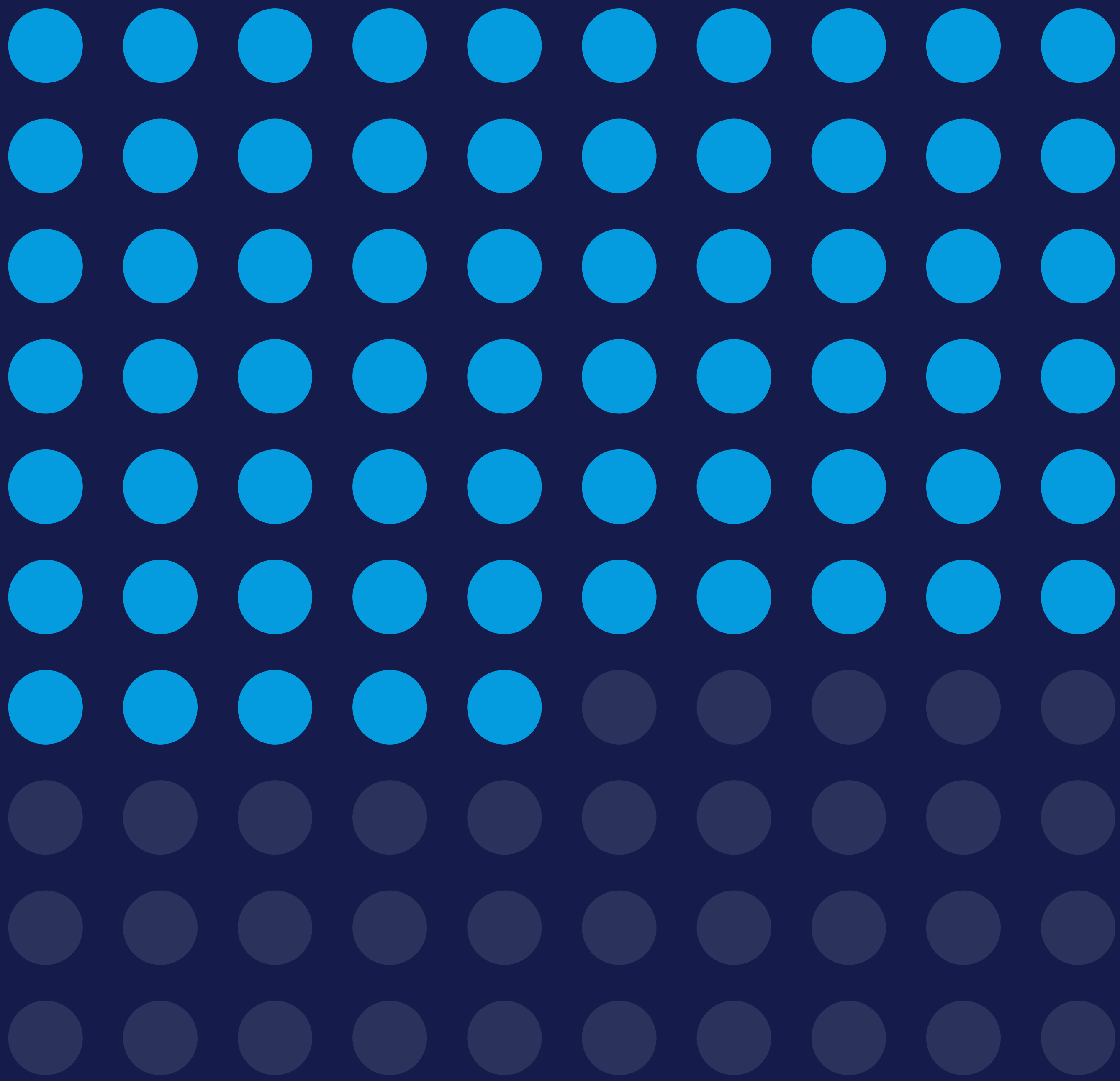


FIGURE 2.4 | HOW SPEND IS SPREAD ACROSS SUPPLIERS

Source: Spend data

Each of those small suppliers still takes work and money to manage. Every one has to be set up in the system, kept current in master data, and paid invoice by invoice, and small, uncontrolled purchases tend to carry higher prices than consolidated ones.

This tail spend is heaviest in mid-market organizations, where 66% of the supplier base is this small, against 58% for enterprises.

It varies by industry too. Manufacturing and Energy concentrate spend the most (top 10 suppliers at around 54%), while Construction is the most spread out (around 36%).

Most teams know they have a long tail. Few can see how long: thousands of suppliers, most too small to notice individually, adding cost and work that never shows up in one place.

💡 FINDING

Visibility and control are the clearest gaps in Nordic procurement.

Respondents rank spend data and contract utilization as their top opportunities, and the benchmark backs them up. Most spend isn't tied to a contract, and a large share of suppliers is too small for anyone to track closely.

CHAPTER 3

Savings are a priority, but rarely measured

Cost is the top priority, and 40% have no savings target

Cost reduction and savings delivery is the most common priority in Nordic procurement, named by 60% of teams. Yet many of the same teams have no way to show the savings they deliver.

💡 FINDING

40%

Procurement's most common priority is also its least measured. 40% of teams have no formal savings target.

SAVINGS TARGET FOR THE NEXT FISCAL YEAR

No formal savings target	40%
2—4% of addressable spend	26%
4—6%	15%
1—2%	9%
Over 6%	6%
Less than 1%	3%

FIGURE 3.1

Source: Survey

Among the 93 teams that name cost reduction a top priority, a third (33%) still set no formal target. And of those, more than half don't track savings at all.

We also asked how confident teams feel about hitting their targets. Among the 115 teams that set one, most are optimistic. 73% expect to meet or beat it.

Across all teams, a quarter say they don't track savings against a target at all. It's hard to feel sure about a number you're not measuring.

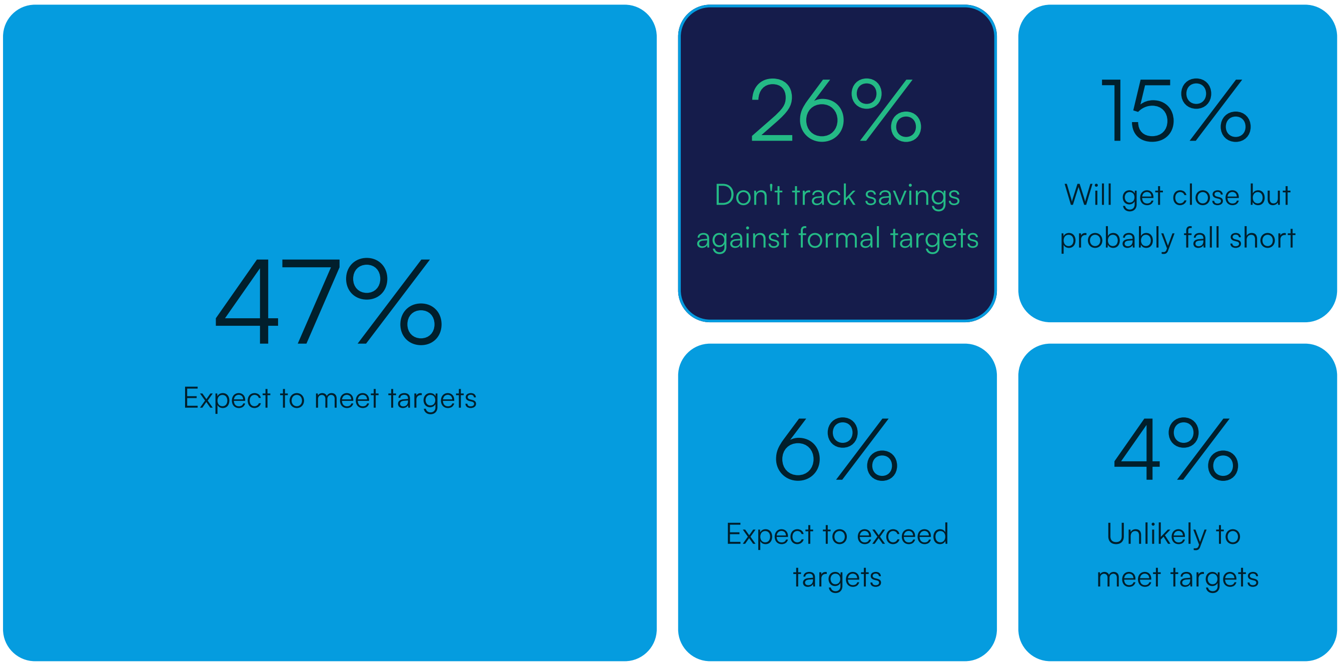


FIGURE 3.2 | CONFIDENCE IN HITTING SAVINGS TARGETS

Source: Survey

Half of teams lack a system to track savings

A lot of this is practical. Fewer than half of teams (47%) have a system to track savings in the first place. And teams that do are nearly twice as likely to set a formal target: 79% versus 42%.

Many teams couldn't systematically track savings against a target even if they set one. This ties back to the maturity index, where tools scored the lowest of all 5 dimensions.

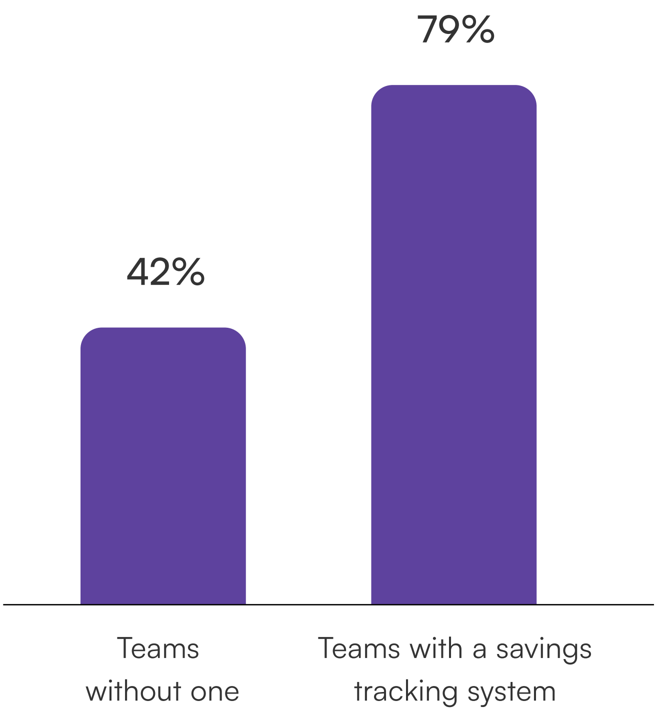


FIGURE 3.3
PROCUREMENT TEAMS
WITH TRACKING SYSTEMS

Source: Survey

Savings discipline tracks maturity and reach

Teams with a formal target score 48 on the maturity index. Teams without score 35. That 13-point gap is the biggest maturity difference anywhere in the survey.

FIGURE 3.4 | TEAMS WITH A TARGET SCORE HIGHER ON MATURITY

Source: Survey

It goes up with reach too. Only 29% of single-country organizations set a formal target. That rises to 54% for Nordic-wide organizations, and 78% for European and global ones.

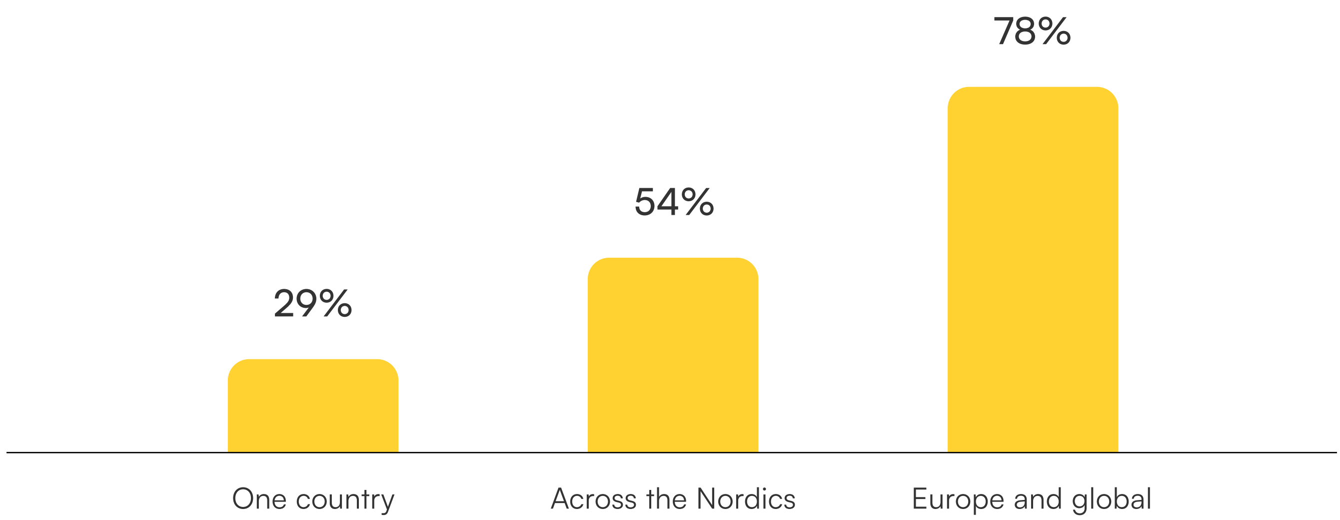


FIGURE 3.5 | TARGET-SETTING RISES WITH REACH

Source: Survey

The teams that work across borders have learned to measure their savings. Domestic players mostly haven't yet.

The teams that set targets are the same teams that have the tracking systems, the higher maturity scores, and the international footprint.

Savings discipline comes as part of the foundation, and it starts with knowing what your spend is doing.

"One of the biggest lessons we learned building a savings program across a newly merged organization was to get the definitions right before anything else. Most savings-tracking problems aren't really tracking problems — they're unresolved arguments about the baseline. We spent time upfront agreeing on what actually counts as a saving, who owns it, and how it gets validated, and that's what gave us credibility with Finance and leadership. My advice: don't build the report before you've agreed on the methodology."

Håkon Matheson
Director of Global Sourcing & Vendor Management at TGS

CHAPTER 4

The productivity gap

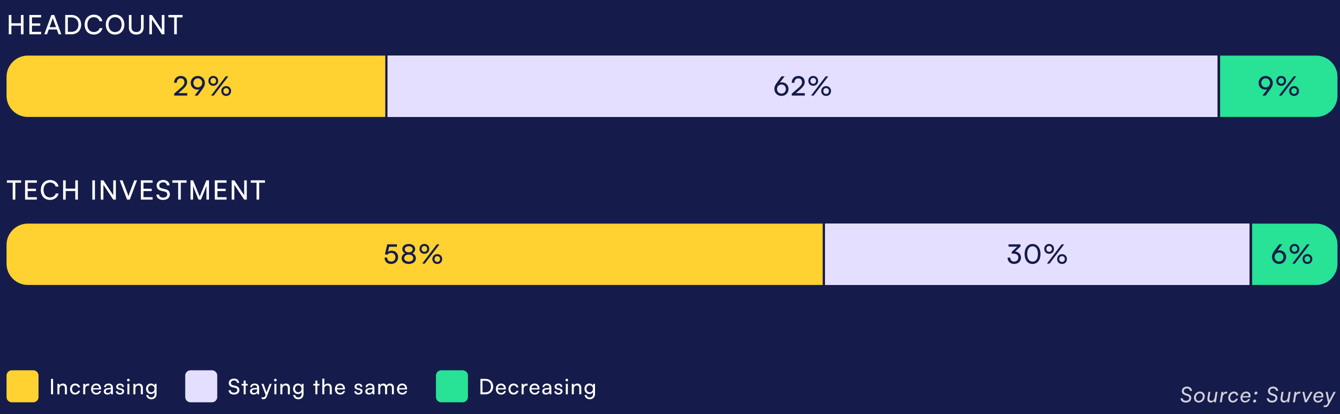
Teams plan to cover more spend with the same people

Capacity is the number one barrier in Nordic procurement. Nearly half of teams (49%) say they don't have enough people or capability to deliver what's expected of them.

The team-size data shows why they feel that way. Procurement headcount doesn't grow with spend. 91% of organizations spending €50M—€200M have procurement teams of 15 people or fewer, and even among organizations spending over €1BN, 35% still do.

And teams don't expect this to change. 62% think their headcount will stay flat over the next 12 months, and only 4% expect it to grow significantly. Technology investment is going the other way. 58% expect it to rise (Figure 4.1).

FIGURE 4.1 | WHERE PROCUREMENT TEAMS EXPECT TO INVEST NEXT YEAR



The tech investment figure excludes 6% of teams with no dedicated technology budget.

The top quartile manages 2.5x the spend per person

The survey shows teams feeling stretched. The benchmark below shows how much spend each procurement person actually manages. For roughly 115 organizations, it combines captured spend with a procurement headcount.

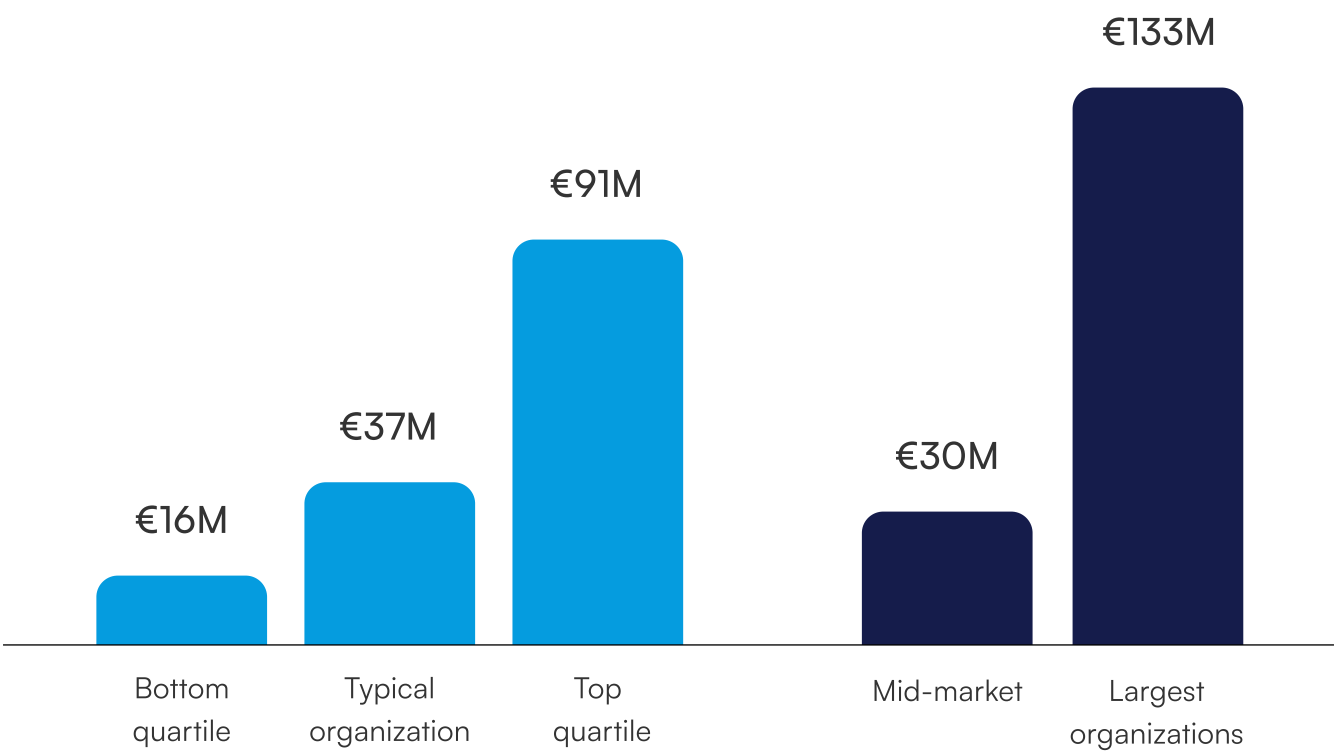


FIGURE 4.2 | SPEND MANAGED PER PERSON

Source: Spend data

FINDING

The most efficient teams manage 2.5x the spend per person. The median organization manages €37M per procurement employee, the top quartile €91M. The bottom quartile sits at €16M.

Most of the gap comes from size. The largest organizations manage around €133M of spend per person, mid-market ones around €30M. Larger organizations get more leverage per person.

By industry, Transportation and Maritime (~€71M per full-time employee) and Construction (~€58M) lead, while Manufacturing and Energy (~€25M) use the most people per euro managed.

Supplier counts show the same load (Figure 4.3). The median organization runs ~129 suppliers per €10M of spend. The leanest quartile runs 63, about half, and the bottom quartile 202. Most organizations could serve the same spend with far fewer supplier relationships.

The size pattern repeats here. Enterprises run about 3x leaner per euro than mid-market (52 vs 144 suppliers per €10M of spend). But each enterprise procurement person still handles more supplier relationships in total: 589 versus 407.

Size reduces suppliers per euro and increases suppliers per person at the same time.

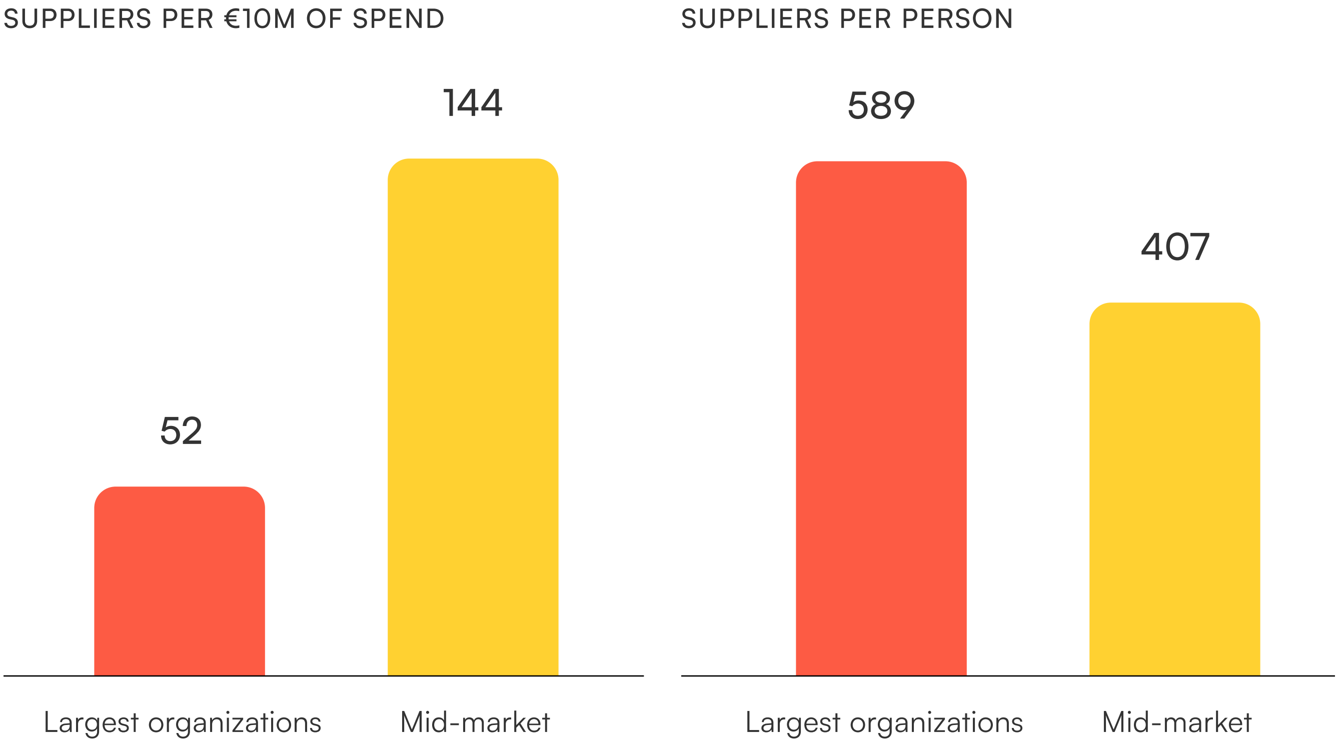


FIGURE 4.3

Source: Spend data

Even the leaders have barely pulled the technology lever

You might assume the most productive organizations run on the best technology.

But among the largest organizations, only 19% run an integrated procurement platform, and 41% still work on point solutions or Excel. Today's productivity levels, the leaders' included, have been reached largely without modern tools.

Part of the leaders' edge is scale. In larger organizations, spend grows faster than procurement teams do, and more standardized processes let each person handle more of it. That’s not something a smaller team can copy.

Technology is the one lever still available to every team, and it can give a lean team some of the same leverage that scale gives a large one. The market is already heading in that direction. 58% plan to spend more on technology while headcount stays flat.

💡 **FINDING**

Today's productivity levels were reached largely without modern tools. The technology lever is still mostly unused, for leaders and everyone else alike.

Closing the distance between a typical team (€37M per person) and the best (€91M) is the opportunity, and there are 2 ways at it. Technology is one, still barely used, as we've seen. The other is the supplier tail from Chapter 2. Thousands of small suppliers that make up 1% of spend but still need managing, so consolidating them cuts work with little commercial risk.

CHAPTER 5

Payment terms are an overlooked lever

Payment terms rank near the bottom of the opportunity list

Payment terms sit near the bottom of the opportunity list. Just 10% of teams put them in their top 3, and only a handful rank them first (Figure 2.1).

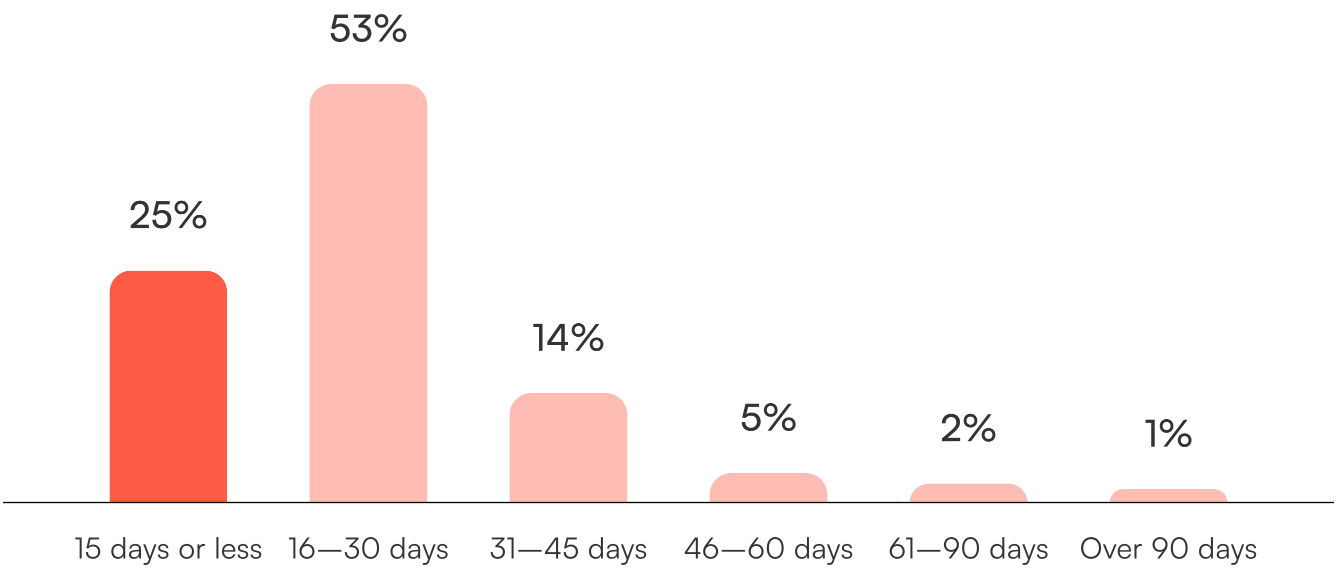
The spend data suggests that's a missed opportunity.

Nordic procurement pays in about 30 days

The spend-weighted average is roughly 29 days, and about 78% of spend is paid within 30 days.

Most of it moves fast. 53% of spend is paid on 16—30 day terms, and a quarter of all spend moves on terms of 15 days or less. Only around 8% extends beyond 45 days (Figure 5.1).

FIGURE 5.1 | HOW FAST NORDIC TEAMS PAY



Based on the 53 organizations with reliable payment-terms data.

Source: Spend data

By international standards, that's quick. Across the EU, the average agreed B2B payment term is 43 days, and actual payment periods stretch past 60. Nordic organizations are paying their suppliers roughly 2 weeks sooner than the European norm, which is good for suppliers but means cash leaves the business earlier than it needs to (source: EU Payment Observatory, Annual Report 2025).

The spread between organizations is fairly narrow: bottom quartile around 23 days, median 28, top quartile 32 (Figure 5.2). The cash involved is still large.

As a rough guide, every extra 17 days of payment terms frees up cash worth about 4.7% of annual spend, a one-time effect on the money otherwise tied up in payments. Moving the typical organization to 45-day terms would release around 4.7% of its annual spend, though not all of it is worth going after. Sometimes paying early gets you a discount, and suppliers may push back if you stretch terms too far.

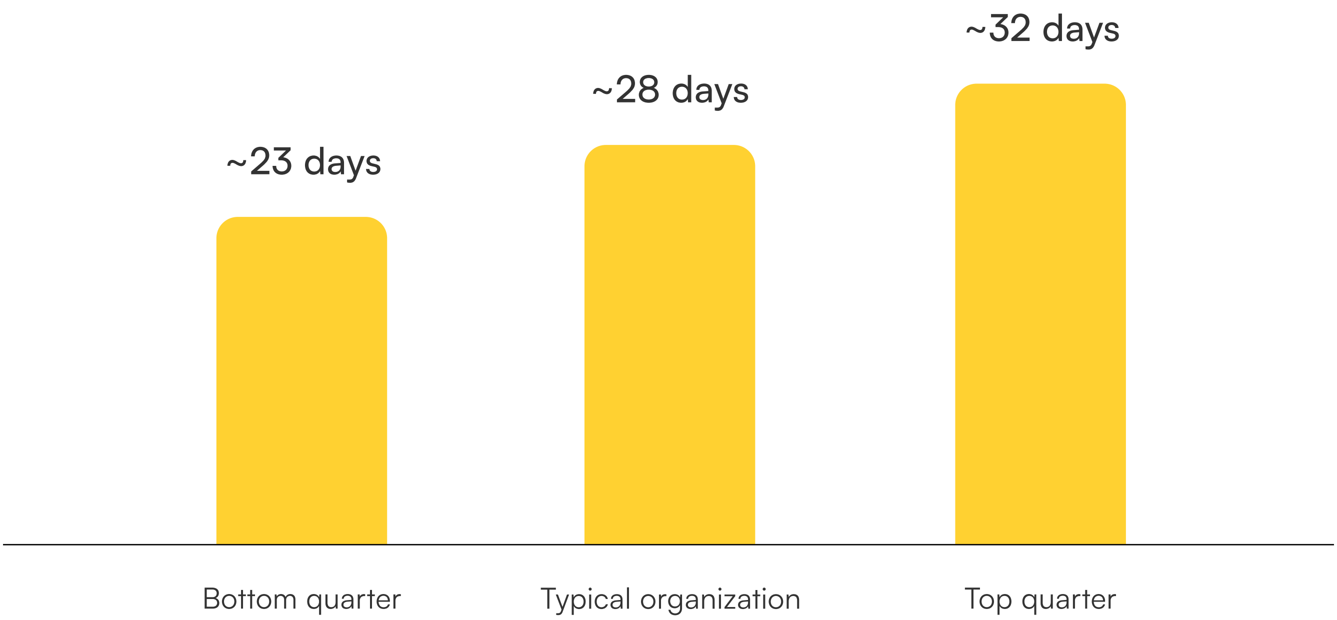


FIGURE 5.2 | AVERAGE PAYMENT TERMS ACROSS ORGANIZATIONS

Source: Spend data

WHAT-IF SCENARIO	CASH RELEASED, SHARE OF ANNUAL SPEND
Typical organization moves to 30-day terms	0.5%
Typical organization moves to 45-day terms	4.7%

This is an illustration of scale, not a target. The point is that payment terms tie up cash, and most teams have never checked how much.

And payment terms don't depend on size. Mid-market and the largest organizations pay on nearly the same terms (28 vs 26 days), and the industry gap is small too. Manufacturing and Construction are slowest at around 30—31 days, Transportation fastest at around 22.

FINDING

Nordic teams pay faster than the European norm (29 days against an EU average of 43), yet payment terms sit near the bottom of their priority lists.

CHAPTER 6

AI is a means, not an end

Most teams are exploring AI, but few have embedded it

77% of teams are using or exploring AI. But only 15% have moved past experimentation into rollout or everyday use (Figure 6.1).

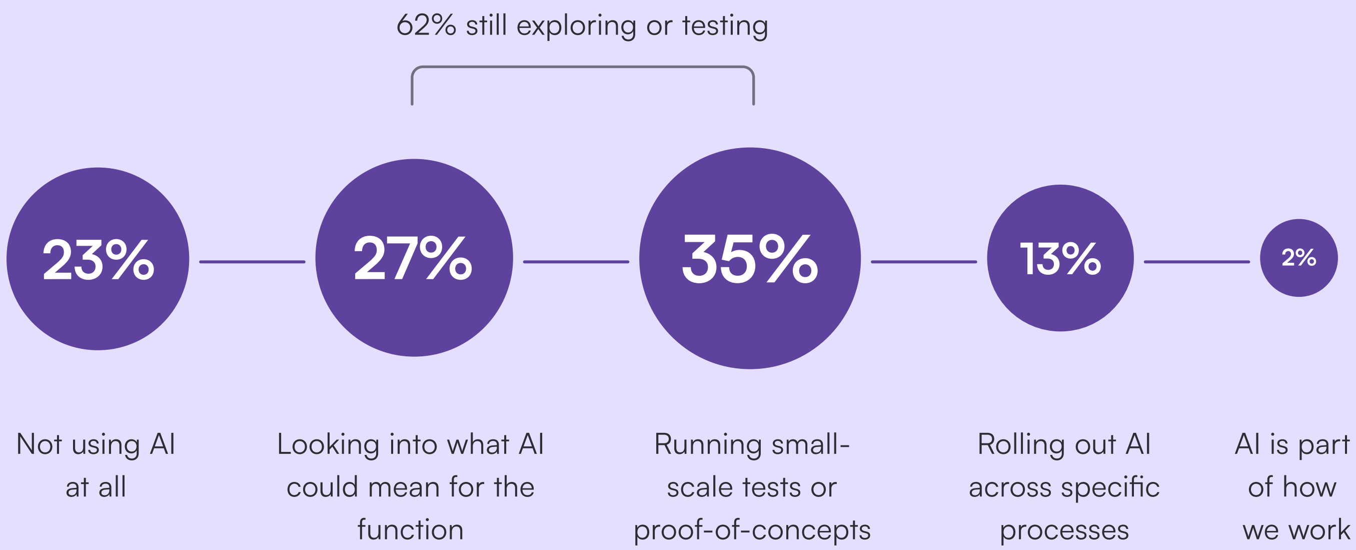


FIGURE 6.1 | THE AI ADOPTION JOURNEY

Source: Survey

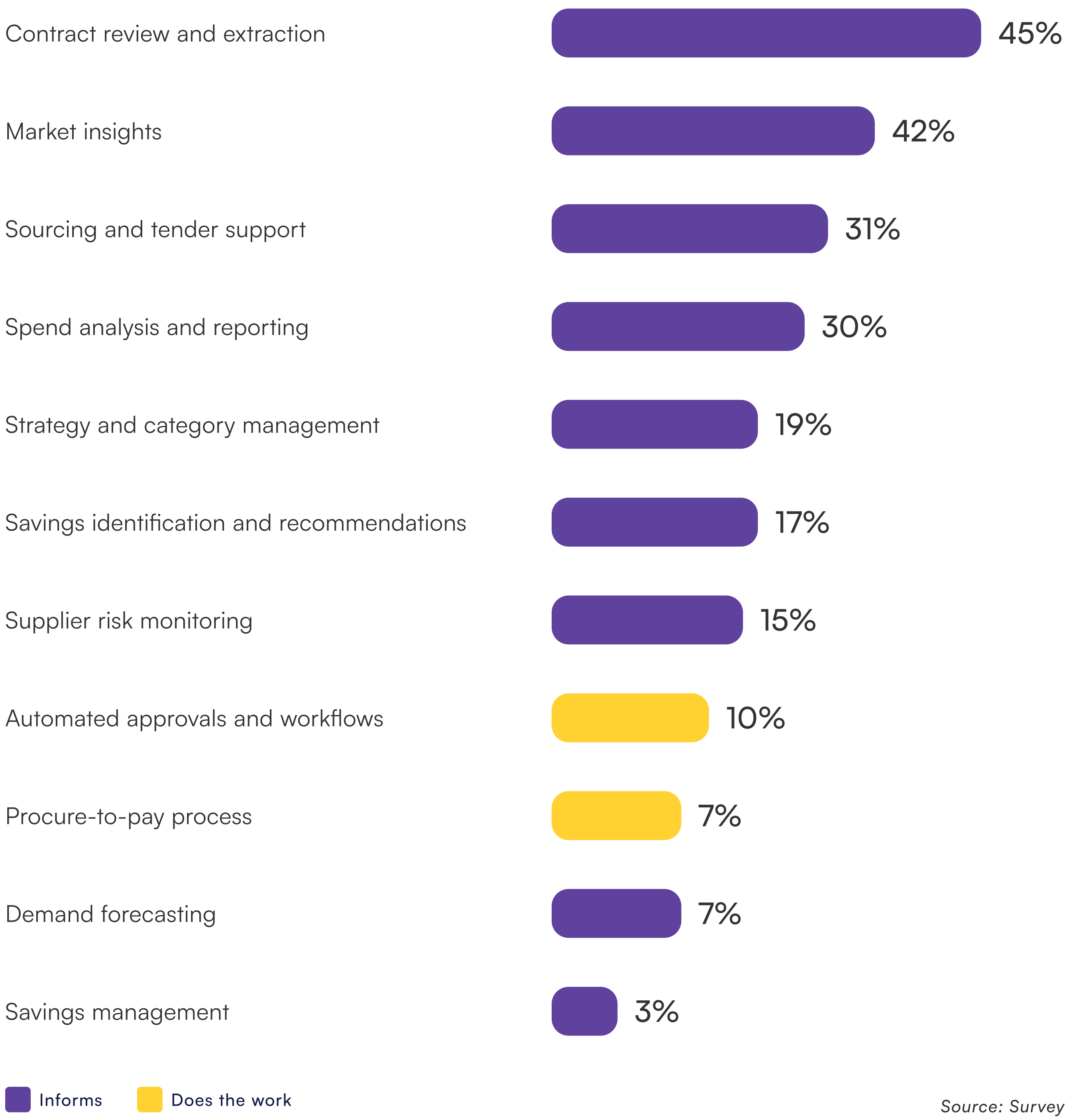
Yet AI ranks low as a stated priority at 19%, well behind cost, suppliers, and data quality (see Chapter 1).

Teams see AI as a way to reach their goals, not a goal in itself. What they care about is cost, control, and supplier performance, and AI is one route to those.

AI informs decisions and rarely executes work

Among teams using AI, the work it does is analysis (Figure 6.2).

FIGURE 6.2 | WHAT TEAMS USE AI FOR



Source: Survey

FINDING

Teams use AI to inform decisions, and almost never to execute the work. Contract review, market insights, and spend analysis lead. The uses where AI acts on its own, approvals and procure-to-pay, sit at the bottom.

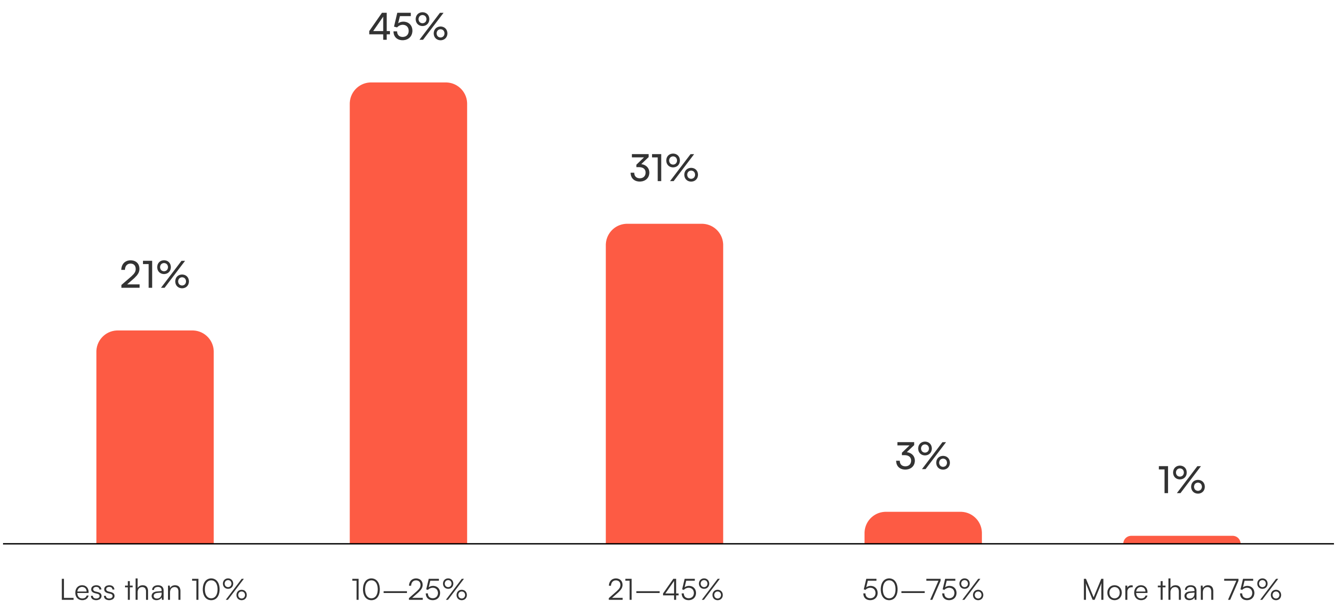
Teams are happy to let AI read contracts, scan markets, and analyze spend. They're far more cautious about letting it change how the work actually gets done.

Some of that is resistance to change, which is a top-five barrier (29%). But the larger limit is that AI is only as good as the data it works from, and for most teams that data is incomplete and hard to see across the business, the same gap the earlier chapters measured.

There's a people side too. Getting value from AI takes capability, and that's the area teams invest in least. Until the data and the skills are dealt with, it sets a ceiling on what AI can do.

Expectations are also modest (Figure 6.3). Two-thirds of teams think a quarter or less of their work could realistically be automated or AI-assisted within three years.

FIGURE 6.3 | HOW MUCH TEAMS THINK AI CAN AUTOMATE



Source: Survey

The most mature teams adopt, whatever their size

Adoption is even across the market. Big or small, domestic or international, it's about half of teams either way that are actively using AI.

Teams actively using AI score 48 on the maturity index, and teams not using it score 38. It's the more capable teams adopting, whatever their size. A mature mid-sized team is more likely to be using AI than a large but less developed one.

Kim Alvarstein
Head of Procurement at Å Energi

“I recognize the gap between exploring AI and getting the technology into day-to-day operations. Our experience is that the value becomes clear when we move from general AI experiments to concrete work processes, like producing procurement documents, analyzing contracts and bids, and making better use of and following up on supplier data.

What's interesting going forward isn't just how AI can give us a better basis for decisions, but how the technology can take over some of the time-consuming, operational work and free up capacity for more strategic tasks. So for me, AI isn't a goal in itself, but a tool for better decisions, smarter processes, and more value created.

AI isn't about replacing people. It's about getting more from the people we have.”

CHAPTER 7

Resilience is felt, but not yet structured

Most teams watch their risk, and 4% run a program

We asked how much of each team's attention goes to managing global uncertainty and supply chain resilience (Figure 7.1).

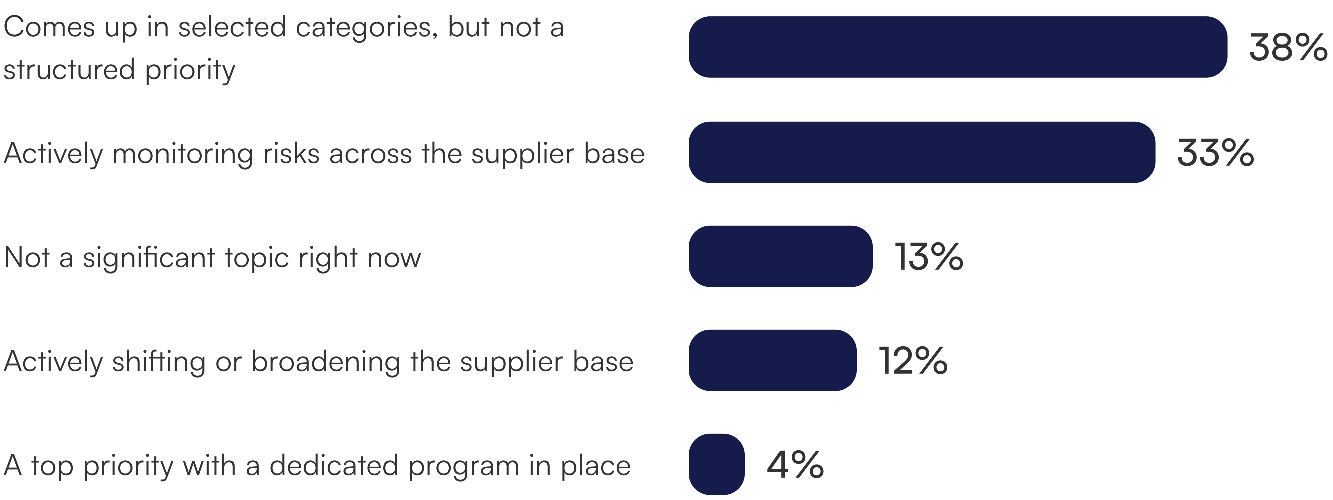


FIGURE 7.1 | HOW TEAMS APPROACH SUPPLY CHAIN RESILIENCE

Source: Survey

💡 FINDING

4%

Resilience is a pressure most teams feel and few have made structured. Only 4% run a dedicated program.

Only 7 of 156 respondents run a dedicated resilience program. At the other end, just 13% say it isn't on their radar at all. The vast majority sit somewhere in between: aware of it, watching it, and handling it category by category.

One group stands out. The 12% actively reshaping their supplier base score 56 on the maturity index, the highest of any subgroup in the survey. For now, turning resilience into a structured program is something only the most mature teams are doing.

"The most successful procurement teams are no longer focused only on internal processes. They continuously monitor supplier markets, geopolitical developments, and external risks that can affect business performance. In my experience, the organizations that gain a real competitive advantage are the ones that turn these insights into action before disruption hits. Geopolitical intelligence work isn't new for an experienced procurement team, but doing it continuously is what's essential now. As uncertainty has become the new normal, there are no long-term plans over five years any longer."

Anette Lindbom
Senior Supplier Manager
at Camurus

Today, resilience is something most teams monitor rather than manage. For the teams that want to lead on it, the shift is about putting a program in place to handle disruption before it arrives.

CHAPTER 8

What we'd do with all this

Procurement's ambitions have moved faster than the foundation underneath them. Most teams report to the CEO, CFO, or COO, and few call themselves administrative. But the basics that earn the mandate teams want are missing for much of the market: connected data, real tracking, modern tools.

Here are the 7 things we'd do, based on what this data told us:

1. Stop asking for a seat at the table. Build the proof instead.
2. One system that works beats a shelf of tools that don't.
3. Set a savings target this year, even a rough one.
4. Design for a team that will never grow.
5. Build capability for what's next.
6. Payment terms deserve a spot on the agenda.
7. Your data will never be perfect. Start anyway.

1

Stop asking for a seat at the table. Build the proof instead.

Plenty of teams told us they're still fighting to be involved early and heard at the top. The leaders who have earned influence stopped reporting on what they did and started reporting on what it was worth. That could be money saved they could prove, a risk they caught before it became a problem, or cash they freed by better terms. Our data shows executive support grows as teams mature. So instead of waiting for a mandate, pick something you can actually improve and show the result. The support tends to come once you do.

2

One system that works beats a shelf of tools that don't.

The average team already has 4 procurement tools, and that's often the problem. It isn't just the inconvenience of switching between them. It's that when data sits in separate places, no one has a complete view, and the numbers that end up in reports are wrong or incomplete. What matters is that the tools connect, because once your spend, contracts, and suppliers sit in one place, you start to see things you couldn't before, like the contract that isn't being used, the same supplier sitting under 3 different names, or the category where costs are climbing. Whether you build that from what you have or invest in something new, the test is the same: does this give us one trusted view of our spend, or just another place for data to hide?

3

Set a savings target this year, even a rough one.

40% of teams have no target, and we suspect many are waiting until they can measure perfectly. Our advice is to skip the waiting. A rough target, tracked imperfectly, teaches you more than no target at all. Most teams don't trust their baseline enough to commit to a number on top of it, but that's the point: working toward a target is what builds the baseline you were waiting for. Of everything in this report, it's the easiest place to start. You need a number and somewhere to track it.

4 Design for a team that will never grow.

Teams already know more people aren't coming. Headcount is flat for most, the work isn't shrinking, and capacity is the barrier teams name most. The cost of a stretched team is the work they can't get to, like running negotiations or starting a savings project. That comes down to where the hours go and how much of them get spent on work that doesn't need a person.

Today, tooling and AI have come far enough to take on much of the busy work, like cleaning data, routine reporting, and more. So design the function for the team you have. Move the routine work off your people, and free them for what only they can do: strategy and relationships. Done well, a smaller team with the right tools will outperform a larger one without them.

5 Build capability for what's next.

Doing more with the same team takes more than tools. It takes people who can use them. As the environment gets more volatile, shaped by supply chain disruption, geopolitical risk, AI, and rapid technological change, capability becomes a resilience factor.

Teams need the skills and confidence to adapt, make better decisions, and use new technology as conditions change. Yet nearly half say lack of people or capability is holding them back, while only 6% prioritize talent development and capability building. Build the capabilities the function will need next, not just the capacity it needs today.

6 Payment terms deserve a spot on the agenda.

We won't oversell this one. Payment terms won't transform your function. But they're one of the few levers where size gives no advantage, the cash it frees up is measurable, and almost nobody prioritizes it.

Nordic teams pay fast, in about 30 days, against an EU average agreed term of 43, which means cash leaving the business earlier than it needs to. The opportunity is easy to miss, because terms only look off when you compare them against the market. Teams that look often find they've been paying suppliers early for no real reason. You don't need a program or a project, just a habit. Make a payment-terms check part of every major category review.

7

Your data will never be perfect. Start anyway.

Procurement leaders don't need us to tell them their data is messy. Most know it better than anyone. The problem is that the mess rarely gets fixed. It falls between procurement, finance, and IT, so no one fully owns it. Data issues are hard to see until someone tries to use it. And a full cleanup looks like a project with no end, so it loses to work that pays off sooner.

That's how it becomes a loop. The data isn't trusted, so no one invests in it. It stays poor, so procurement struggles to prove its value, which is what would earn the mandate to fix it.

Our view is to break the loop. Don't wait for the big cleanup or the perfect dataset. Start with what you have, fix what the work exposes, and build a trusted view of your data even while the systems underneath it stay messy.

2 things are worth setting up front: an owner and an end date. Give someone clear responsibility for the data so it keeps moving forward, and put a timeline on it so it stays a defined piece of work rather than the open-ended project everyone dreads. And it's important to start soon. Most teams have an AI agenda, and AI only amplifies the data beneath it.

To the 156 people who took the survey: **thank you.**

This report exists because you were generous with your time and honest in your answers.

CHAPTER 9

Methodology

The two sources

This report combines 2 separate datasets.

THE SURVEY

156 procurement practitioners and leaders across the Nordics completed the survey in June 2026. Nearly half are Head of Procurement or above. 56% of their organizations manage more than €200M in annual procurement spend, and a third operate globally.

THE SPEND BENCHMARK

Anonymized spend data from 154 Nordic organizations, together representing €41 billion in spend, spanning 6 industries and 2 size bands (Enterprise = over €430M captured spend; otherwise Mid-market). 144 of the 154 organizations are from the 2025 benchmark year, so the data is current rather than a multi-year blend.

The 2 panels draw from the Nordic procurement market, and some organizations may appear in both. Because the survey was anonymous, we can't match responses to specific organizations, so the 2 are never joined at the organizational level. They're presented side by side throughout the report, and every figure is labeled with its source.

Data-quality gates in the benchmark

3 gates protect the benchmark figures.

1	Payment-terms metrics are reported only for organizations where at least 70% of positive spend carries a valid invoice-to-due-date term and the average is at least 10 days; 53 of 154 organizations qualify.
2	Contract coverage is reported only for organizations with material contract linkage (at least 1%), since linkage is unpopulated for roughly 44% of the panel. Organizations with under €1M captured net spend are excluded.
3	Spend-per-employee metrics use the roughly 115 organizations with a credible procurement headcount, estimated from public professional-network data.

The Nordic Procurement Maturity Index

The index combines 5 survey questions, each a ladder of 5 levels from least to most developed. Each answer maps to a level from 1 to 5, rescaled to 0—100 (level 1 = 0, level 5 = 100), and the 5 dimensions are averaged with equal weight.

Statistical conventions

Where the report describes a difference between groups as a finding, that difference is statistically significant ($p < 0.05$). Differences that don't reach significance aren't presented as findings. At 156 responses, the margin of error on a 50% result is roughly ±8 percentage points at 95% confidence, and subgroup figures carry wider margins, which we account for throughout.

About the partners

Ignite is the leading procurement and supplier intelligence platform, giving companies complete visibility and control over their spend and suppliers. By connecting and enriching fragmented data, Ignite turns it into actionable intelligence, helping teams uncover savings, reduce risk, and build stronger supplier relationships. Ignite is trusted by 250+ Nordic businesses and municipalities, including Veidekke, OBOS, and Stena Metall.

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Building a better working world

EY exists to build a better working world, helping to create long-term value for clients, people and society and build trust in the capital markets. Enabled by data and technology, diverse EY teams in over 150 countries provide trust through assurance and help clients grow, transform and operate. Working across assurance, consulting, law, strategy, tax and transactions, EY teams ask better questions to find new answers for the complex issues facing our world today.

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