



Procurement Pathfinder 2024

A Trend Outlook

Whitepaper by The Procurement Initiative

In association with



procurementinitiative.org



Foreword

Procurement is in a constant state of flux, and at the cusp of the next decade, it has never been more critical to understand and capitalize on the trends reshaping global supply chains. In a world constantly on the verge of the next big leap, recognizing trends is something like a map to the stars – it's not only fascinating but also essential for navigation.

In business terms, thinking strategically requires us to constantly re-evaluate our projections to harness the winds of change effectively. Acknowledging the trend as a friend makes the impact of Procurement go far beyond transactional interactions; it can drive sustainable competitive advantage and innovation.

The "Procurement Pathfinder 2024" embarks on this important quest, navigating the currents of today and the tidal forces that will shape the future. As a result of our collaboration between H&Z Management Consulting and the Institute for Supply Chain Management at the University of St. Gallen, this whitepaper provides a snapshot of 100+ Procurement experts' insights and offers a comprehensive forecast for the future of Procurement. By analyzing the results of the Procurement Pathfinder 2024 survey, we aim to examine the key trends that will redefine Procurement in the next decade.

Tackling the trends ahead is vital. Yet, Procurement is not on its own. Just as Procurement has evolved from a peripheral function to a strategic cornerstone, it must collaborate with internal and external stakeholders to embrace and implement trends. The challenges and opportunities that lie ahead cannot be met through isolated efforts but only through the confluence of expertise and a shared vision. As Procurement continues to assert its role as an orchestrator within the organization, engaging in dialogue, research, and collaborative initiatives that drive value beyond the bottom line is imperative.

This whitepaper serves as a compass – a guide to help Procurement professionals navigate the complexities of a changing global economy. With the first (of many upcoming) edition(s) of our Procurement Pathfinder, we invite you to shape the future of Procurement. Let's embark on this journey with the determination to embrace the trends of the coming decade, anticipate the challenges, and seize the opportunities to create a resilient and value-driven future for Procurement.

Best,



Martina Buchhauser

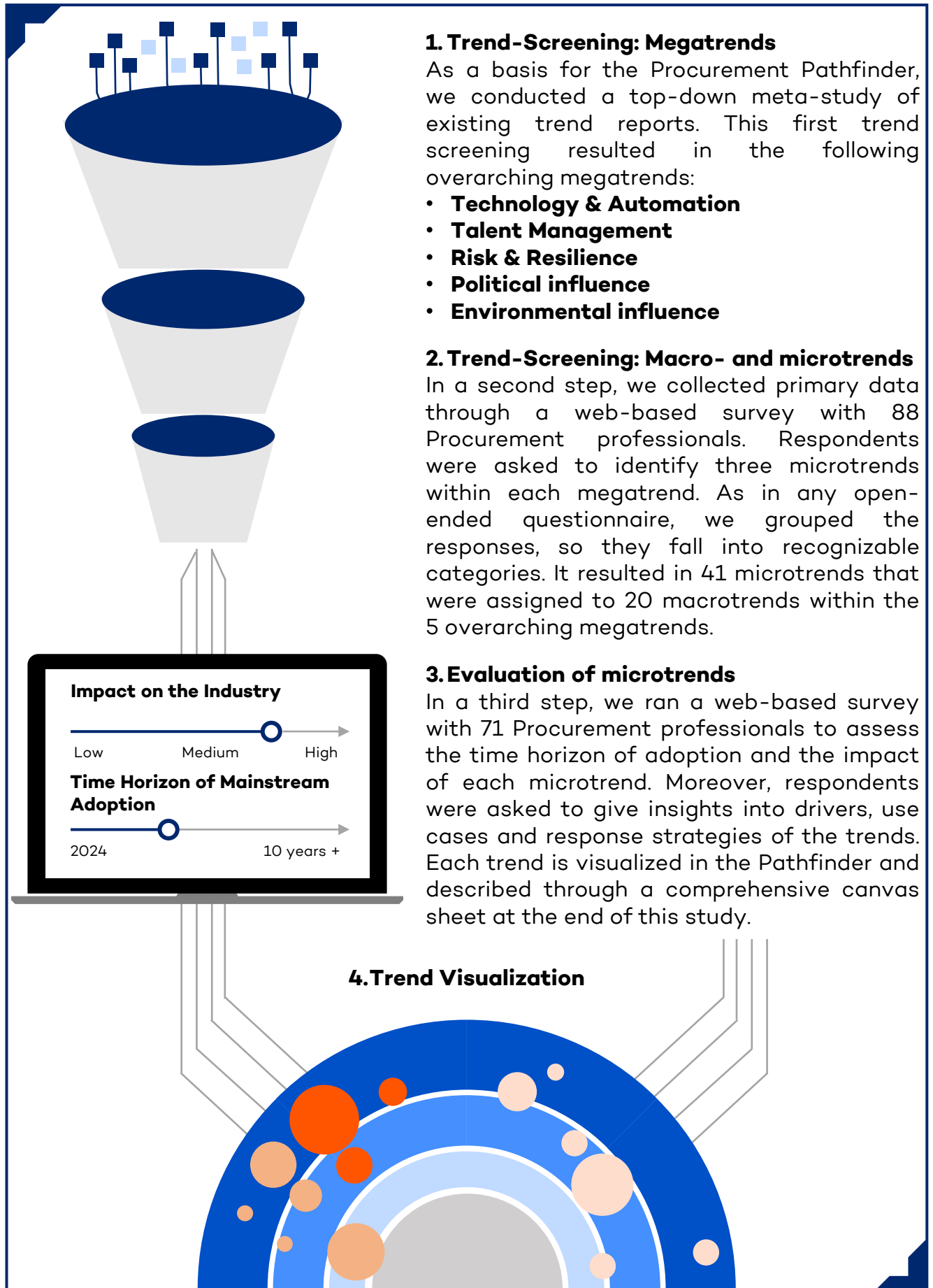
Founder – The Procurement Initiative



Maximilian Marks

Partner – h&z Management Consulting

RESEARCH APPROACH – A FOUR-STAGE PROCESS TO THE PROCUREMENT PATHFINDER



GETTING STARTED: MEGA-, MACRO- AND MICROTRENDS



Introduction to the Procurement Pathfinder 2024

Based on our four-stage research process, the Procurement Initiative Pathfinder contains a total of 41 microtrends that will impact Procurement within the next ten years. These trends are assigned to 20 macrotrends and 5 megatrends.

5 Megatrends				
Environment	Politics	Risk & Resilience	Talent Management	Technology & Automation
20 Macrotrends				
▪Resource Efficiency ▪Circular Economy ▪CO2 Tracking & Management	▪Regulation ▪Geopolitics	▪Diversification & Localization ▪Crisis Resilience ▪Supplier Risk Management & Visibility ▪Sourcing Agility ▪Procurement As-a-service ▪Inflation	▪Talent Shortage & Adaptive Employment Strategies ▪Innovative Coaching & Talent Impact ▪New Work Trends	▪AI & ML ▪Blockchain & Digital Identity ▪Virtual World Integration ▪Advanced Technologies ▪Smart Logistics ▪Process Standard. & Automation
41 Microtrends				
▪Carbon Accounting ▪ ...	▪Public Incentives ▪ ...	▪Supply Chain Diversification ▪ ...	▪On-Demand Learning ▪ ...	▪P2P Automation ▪ ...

On the following page, we explain the structure of the Procurement Pathfinder and visualize the 20 macrotrends based on the assessment of their impact and the time of mainstream adoption. Each macro trend is color-coded according to the megatrends (see the colored boxes on to the right).

Each macrotrend is composed of at least one microtrend. At the end of the study, each microtrend is presented in a canvas sheet that outlines the macrotrend in detail, including its drivers, use cases, and implications. You can click on any trend illustrated in the Procurement Pathfinder to directly access the canvas sheet.

NAVIGATING THE RADAR



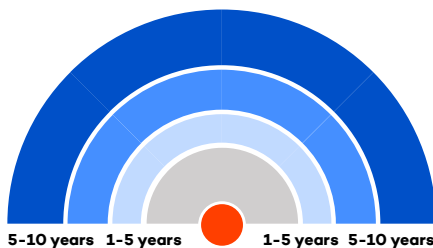
The Procurement Pathfinder by the Procurement Initiative illustrates 5 megatrends that will shape the future of Procurement. Based on primary and secondary sources, we created our trend radar, visualizing and assessing the 20 most significant macrorends according to their impact on Procurement and mainstream adoption.

Assessment of Macrotrends



Firstly, you'll find all 20 macrorends and their assessment regarding impact potential and time horizon in the Trendradar. The **dark orange** dot represents **status quo** Procurement. The macrorends were allocated according to the following color coding: **Dark blue** dots refer to trends in the **Environment**, **blue** dots indicate the allocation to **Political Influences**, **orange** bubbles show an allocation to **Risk and Resilience**, **light blue** dots refer to **Talent Management** and, lastly, **pink** bubbles display that a macrotrend is situated in the field of **Technological Developments and Automation**.

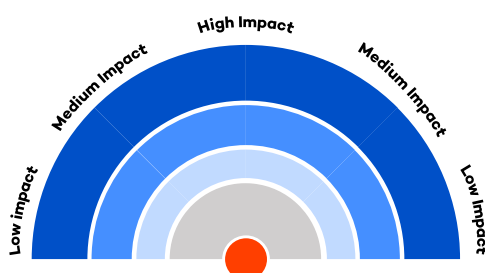
Time Horizon till Mainstream Adaptation



Secondly, we added two different time classifications. The first category includes trends that we expect to substantiate within the **next five years**, you'll find these closer to the middle of the radar. These trends require Procurement teams to take fast action to not lose the competitive edge to their competition.

The second category includes trends that will realize in **five to ten years**. Predictive organizations must set the basis to implement developments and mitigate challenges in order to stay competitive in the long-term.

Level of Disruptive Impact on Procurement



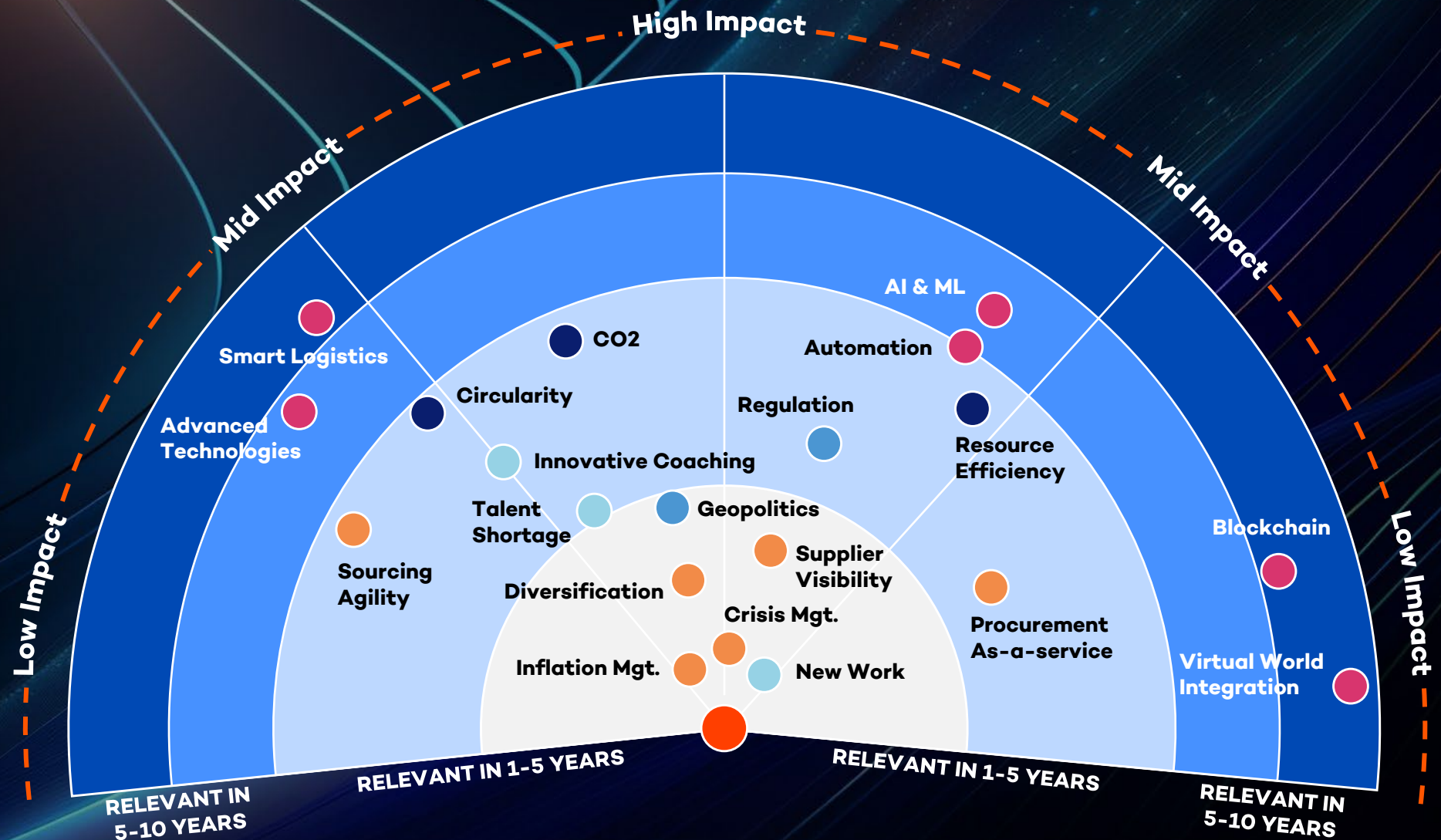
Thirdly, the Procurement Pathfinder allows insights in to the level of impact. If a trend is categorized as **low impact**, it won't change the landscape. Yet, it is crucial that every organization monitors them. Trends evaluated as **medium impactful** have the potential to change the competitive landscape, resulting in companies losing or gaining a competitive edge. Lastly, if a trend has a **high impact**, it has either profound impact as of today or can shape the entire future of Procurement.

THE PROCUREMENT PATHFINDER | 2024



 Click on a trend to directly access its canvas sheet

● Technology & Automation ● Risk & Resilience ● Talent Management ● Politics ● Environment



IS THE TREND YOUR FRIEND? POTENTIAL WAYS FORWARD



The Procurement Pathfinder provides a systematic overview of the most significant trends in Procurement based on five megatrends, which in turn comprise 41 specific microtrends. Overall, companies should focus on three archetypical strategies when tackling the trends ahead: Respond, Prepare, and Monitor.

Respond

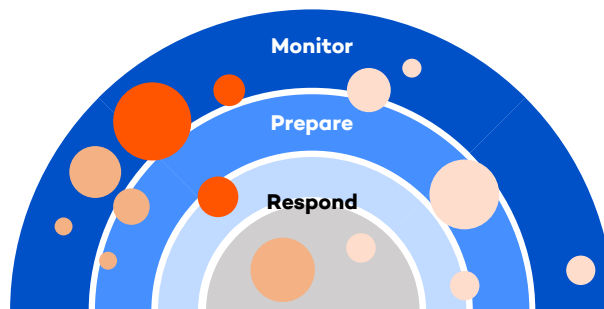
Trends already have a strong impact as of today and most market participants are in motion or actively responding to them. Trends in this area include Inflation Management, Geopolitics, and New Work.

Prepare

Trends have at least a medium impact on the industry in the medium term and companies should prepare for them. Trends in this area include AI & Machine Learning, Circularity, and Automation.

Monitor

Trends are expected to have only a limited influence on procurement in the foreseeable future but could become important in the long run. Trends in this area include Blockchain and Virtual World Integration.



General Observations from the Procurement Pathfinder

Of the 20 macrotrends, 13 are already assigned to the “Respond” category. As such, a multitude of trends are already transforming the Procurement landscape today. Procurement teams should therefore prioritize, but not lose sight of the trends that are emerging on the horizon. To do so, we established 3 guidelines that allow Procurement teams to respond to, prepare for and monitor trend developments.



Consider the bias: Procurement trends are evolving at varying pace and impact. Trends categorized under Talent Management are observed to have an accelerated impact. Conversely, trends within Technology and Environmental influence may unfold over a longer horizon but require proactive engagement to mitigate risks and capitalize on opportunities.



Prioritize well: Given the multitude of trends and the limited resources at the disposal, Procurement functions must develop the capability to discern which trends will have the most immediate and significant impact. This involves a continuous process of scanning, assessing, and prioritizing trends based on their relevance and impact against their firm-specific background.



Think holistic: The complexity and interconnectivity of the identified trends underscore the need for Procurement functions to maintain a holistic picture. Technology is good but requires the necessary knowledge and decision-rights within organizations. Consequently, each trend must be embedded and aligned within the underlying operating model.

INDUSTRY-SPECIFIC INSIGHTS – AUTOMOTIVE AND MEDTECH



Not all trends are equally important for all companies. In some cases, their relevance heavily depends on the industry and other contextual factors such as the business model. To demonstrate the effects of industry-specificity, we examine four examples: Automotive, MedTech, Financial Services and MEM industry. Each of these industries, representing a significant portion of our trend radar respondents, exhibits unique characteristics that influence the relevance and impact of Procurement trends. The objective here is to pinpoint distinctive trends within these industries, providing a nuanced understanding of how Procurement strategies and practices need to adapt in response to industry-specific dynamics.

Automotive Industry:

The Automotive industry currently faces transformational challenges. More severe competition in the field of electric vehicles (EVs), especially from China, supply chain disruptions, and environmental concerns place enormous cost pressure on established, primarily European, players. Based on our survey panel, we identified three particularly relevant trends to help Procurement teams prioritize and create value in the automotive industry.



Regional Sourcing: Crisis such as COVID have revealed the fragility of OEM supply chains, especially regarding semiconductors, in the past. Regional sourcing helps preventing or moderating the effect of these issues



Strategic Sourcing for Circularity: Ambitious CO2 targets and the possibility of reducing dependence on virgin material will lead to an increase in the importance of circularity in the Procurement process



Carbon Accounting: Extensive regulations require the automotive industry to address emissions from all scopes. Participating in networks such as Catena-X can be a first step toward achieving full visibility

MedTech Industry:

In the MedTech industry, Risk and Resilience and Talent Management are the trend categories of foremost importance. The global health crisis underscored the critical need for robust supply chains capable of withstanding unprecedented disruptions. As such, MedTech Procurement functions should focus on enhancing supply chain resilience through diversification and stringent risk management practices. Additionally, the rapid pace of technological advancements in healthcare demands specialized talent capable of navigating the complexities of modern MedTech Procurement. Investing in talent development and leveraging expertise in cutting-edge technologies and regulatory compliance are pivotal.



Talent Attraction: Major MedTech players struggled with product availability since their suppliers could not staff their lines, therefore, a profound talent attraction strategy is needed to secure the industry



Supply Chain Diversification: Due to the product complexity, it is difficult but crucial to source input factors from various regions and suppliers



Supply Chain Resilience Audits: Based on the critical nature of the industry, conducting resilience audits is a necessity to ensure business continuity

INDUSTRY-SPECIFIC INSIGHTS – FINANCIAL SERVICES AND MEM



Financial Services Industry:

Financial services companies are present in every aspect of life and business activity, either by providing financing solutions or insurance coverage. These companies also face enormous pressure from various trends. Navigating in strictly regulated environments is a well-known setting for financial services. However, technological advancements offer unprecedented opportunities to improve their business activities and models. While their direct environmental impact is rather small, especially compared to manufacturing companies, indirect levers are incredibly significant. For instance, by using carbon metrics or disruption prediction when deciding on issuing a loan or providing insurance coverage.



Digital Supply Chain Twins: Supply Chain Twins enable financial services companies to reliably predict Procurement disruptions and associated costs and then decide on the applicability and terms of their products



Cybersecurity: Insurance companies are very sensitive in the field of cybersecurity. More regular and severe attacks that hinder Procurement can cause damages worth billions, which need to be covered by insurances



Hedging: When Procurement departments try to hedge their risks through financial products, they need to do so through their bank. Therefore, banks are assigned a crucial role in mitigating Procurement risks

Machinery, Electrical and Metal (MEM) Industry:

MEM companies face great challenges that have to potential to disrupt the entire industry. Procurement teams must consider a variety of aspects in their daily work, including sustainable sourcing, energy and supply chain security, but also talent attraction issues. Since today's labor market is very favorable for the employee side, competing for top talents in Procurement is a very difficult task due to the wide availability of job possibilities. Moreover, past years have shown the fragility of the industry's supply chain and increased the demand for sustainable practices.



Sustainable Energy Sourcing: Energy-intensive processes, as the ones in MEM, are connected to emissions. Procurement teams must ensure sustainable energy sourcing to meet their CO2 reduction targets



Supply Chain Resilience Audits: Energy outages and supply chain disruptions have been major issues for Procurement in MEM in the past. Conducting in-depth audits help to mitigate these risks due to high visibility



Talent Attraction: Many young and talented professionals do not consider Procurement as their most attractive career path: Therefore, establishing attractive packages to attract high potentials is crucial

USING THE PROCUREMENT PATHFINDER: A PRACTICAL WORKSHOP FRAMEWORK



Practitioner's guide

To enable Procurement functions to systematically assess the relevance and impact of Procurement trends, we propose a concise workshop format to help practitioners tailor the results of this study to their idiosyncratic environment. Our workshop format aims to equip Procurement organizations with the insights and tools necessary to proactively adapt to the main trends affecting Procurement.

Workshop design

Prepare a workshop



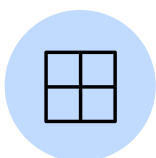
Identifying and managing Procurement trends requires the viewpoints of different seniority levels in Procurement. Challenges and problems are often hidden from senior management while professionals lack the strategic thinking of opportunities on the horizon. Therefore, we recommend that workshop participants should include a team representation from multiple levels (from CPO to operational buyer).

Make use of our Procurement Pathfinder and canvas sheets



Begin with a comprehensive overview of the five overarching megatrends – Environment, Politics, Risk & Resilience, Talent Management, and Technology. In addition, we recommend workshop participants to study each microtrend canvas sheet before the workshop to gain a foundational understanding.

Evaluate each macrotrend based on a 2x2 matrix



During the workshop, we recommend using a 2x2 matrix to assess each macrotrend in terms of its impact on the organization and the relevant time horizon. Discussions can be structured in divided groups or one big group. We recommend this framework to start a critical discussion on how each trend could influence the strategic direction and operational processes of the Procurement organization.

Discuss in plenary



Conclude the workshop with a plenary session where each group presents their findings. This facilitates knowledge sharing of ideas, as we believe that physical interaction and communication between workshop participants are at the heart of any workshop ideation.

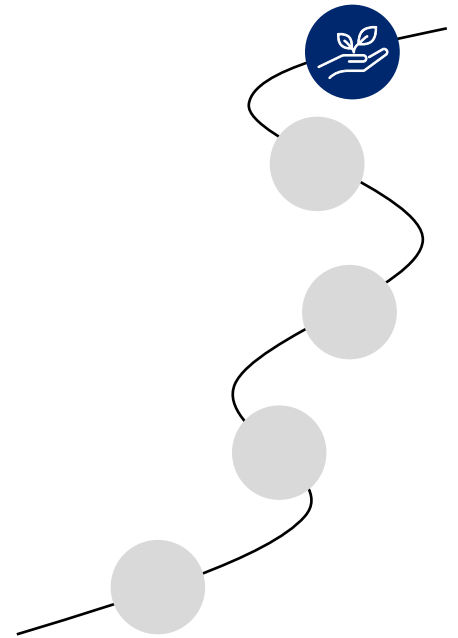
Create an action plan



Every workshop should deliver actionable results. Therefore, we recommend highlighting the actual outcomes of your workshop and recording them in a concise and digestible form. Summarizing and writing down your results will sharpen understanding and facilitate communication of next steps. We recommend clustering the trends into the three response strategies: Respond, Prepare, and Monitor. Remember not to carve your action plan in stone as Procurement trends, impact and time horizons are rapidly changing and should be revisited regularly.

Environment

Sustainability is the “new normal” as Procurement can play a leading role in reducing their companies supply chain footprint and moving towards a circular business model. Environmental trends are driven by the threat of resource scarcity. As natural resources such as water, oil, and rare earths become scarcer, the likelihood of disruptions increases. At the same time, climate change will accelerate the risk of natural disasters such as hurricanes or volcanic eruptions. With most greenhouse gases stemming from Scope-3 emissions in the n-tier, companies must develop a strategy to keep supply chains robust in the face of environmental concerns. In the following chapter, we identified three refined Environmental trends that are analyzed in detail: Resource Efficiency, Circularity, and CO2 Management



THE NEW IMPERATIVE FOR PROCUREMENT LEADERS: EMBRACING THE ENVIRONMENTAL, SOCIAL, AND GOVERNANCE AGENDA



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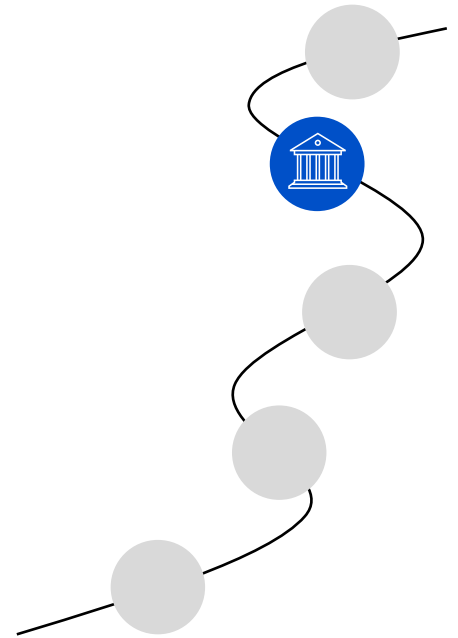


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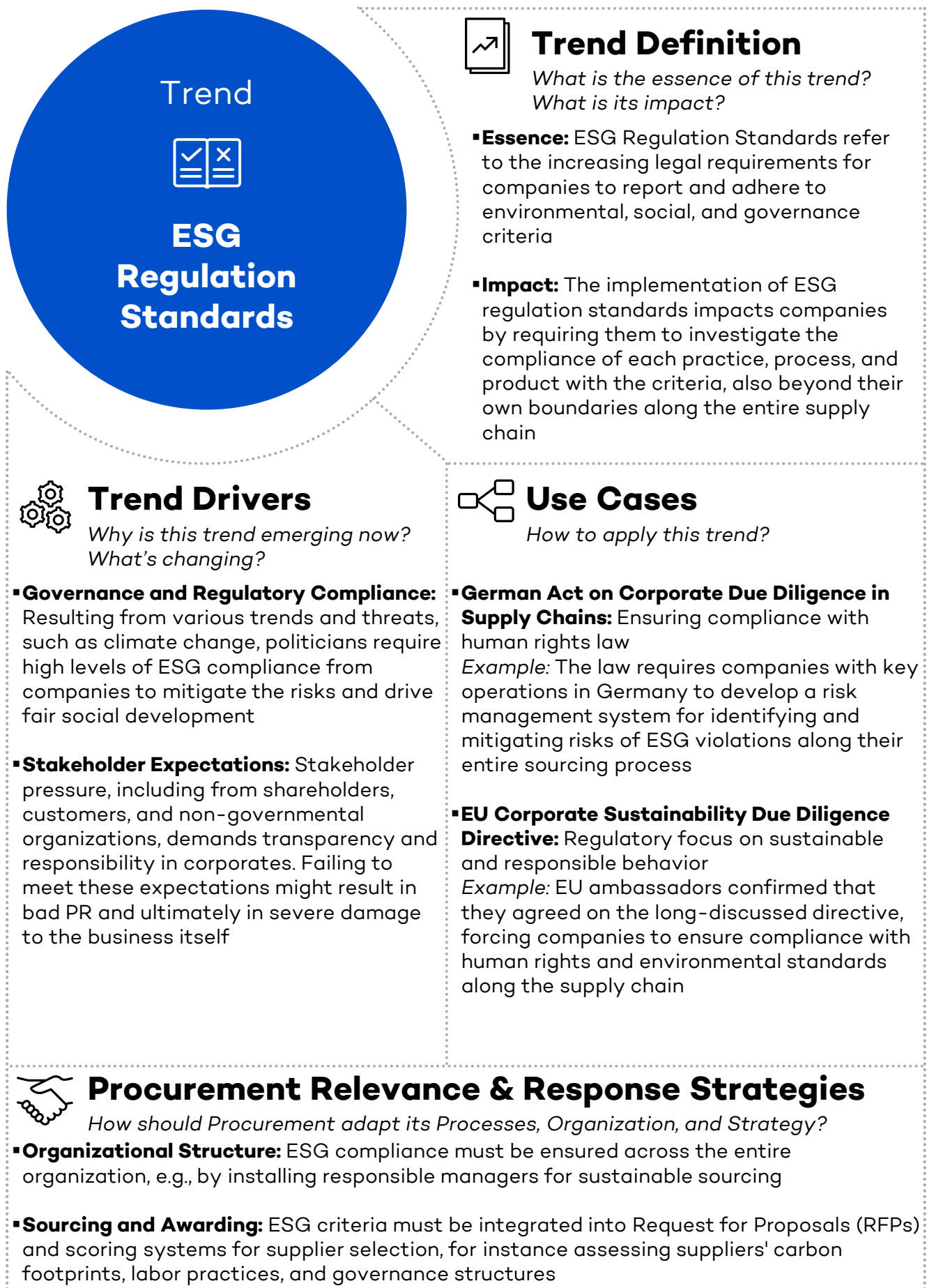


Politics

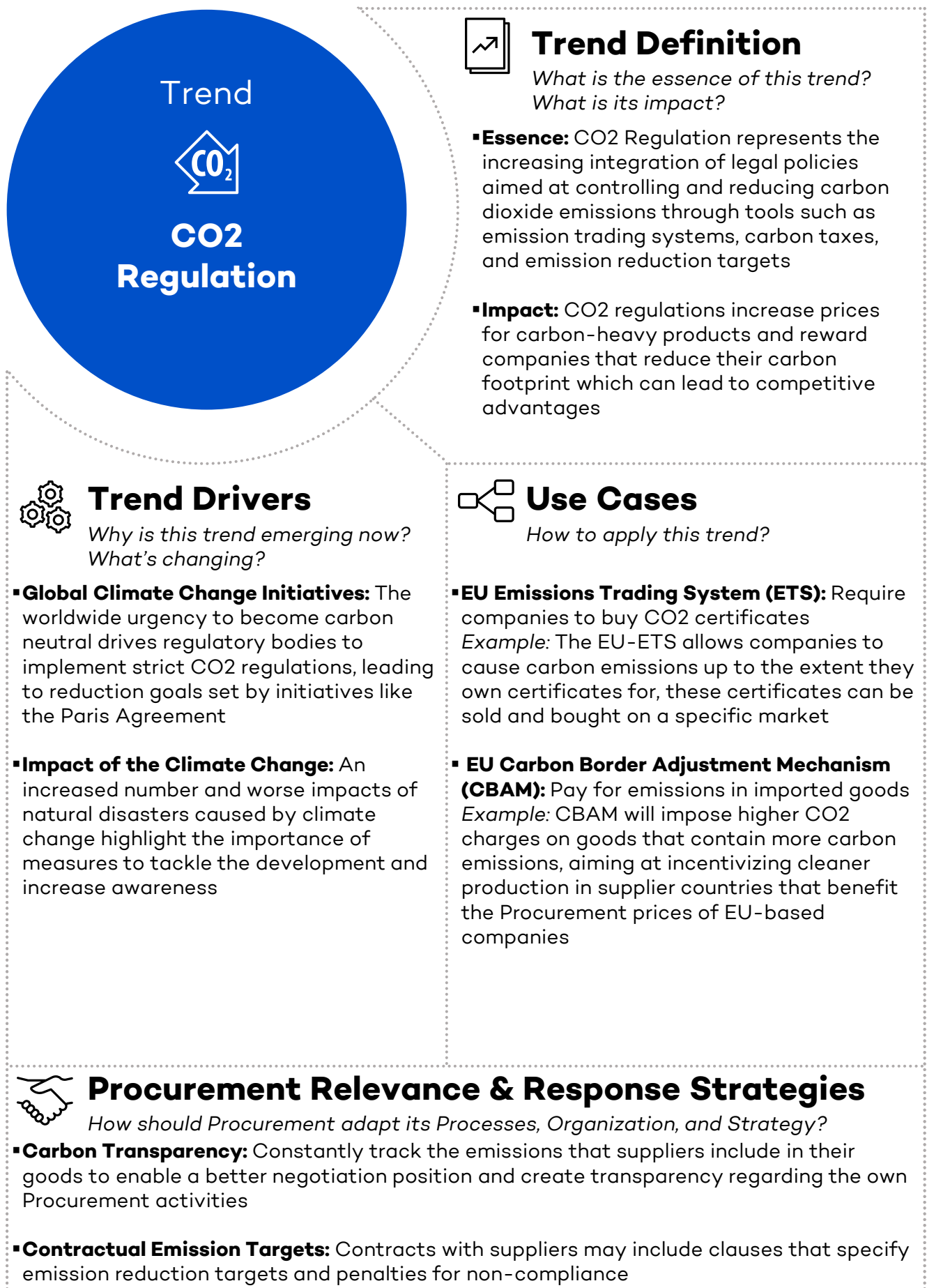
National political regulations and geopolitical trends have a profound impact on the Procurement landscape. New regulatory frameworks necessitate a change in Procurement activities to ensure compliance while maintaining operational efficacy. In addition, trends such as protectionism, import tariffs or subsidies for local production, will increase the influence of politics on global trade and supply chains. In this context, supranationalism and increasing regionalization driven by trade agreements (e.g., EU, USMCA, RCEP) are expected to boost the substitution of global suppliers with local suppliers. In the following chapter, we identified two refined Political trends that are analyzed in detail: Regulation and Geopolitics



THE POLITICAL WINDS OF CHANGE: HOW LEADERS CAN HARNESS THE POWER OF REGULATION TO DRIVE SUCCESS



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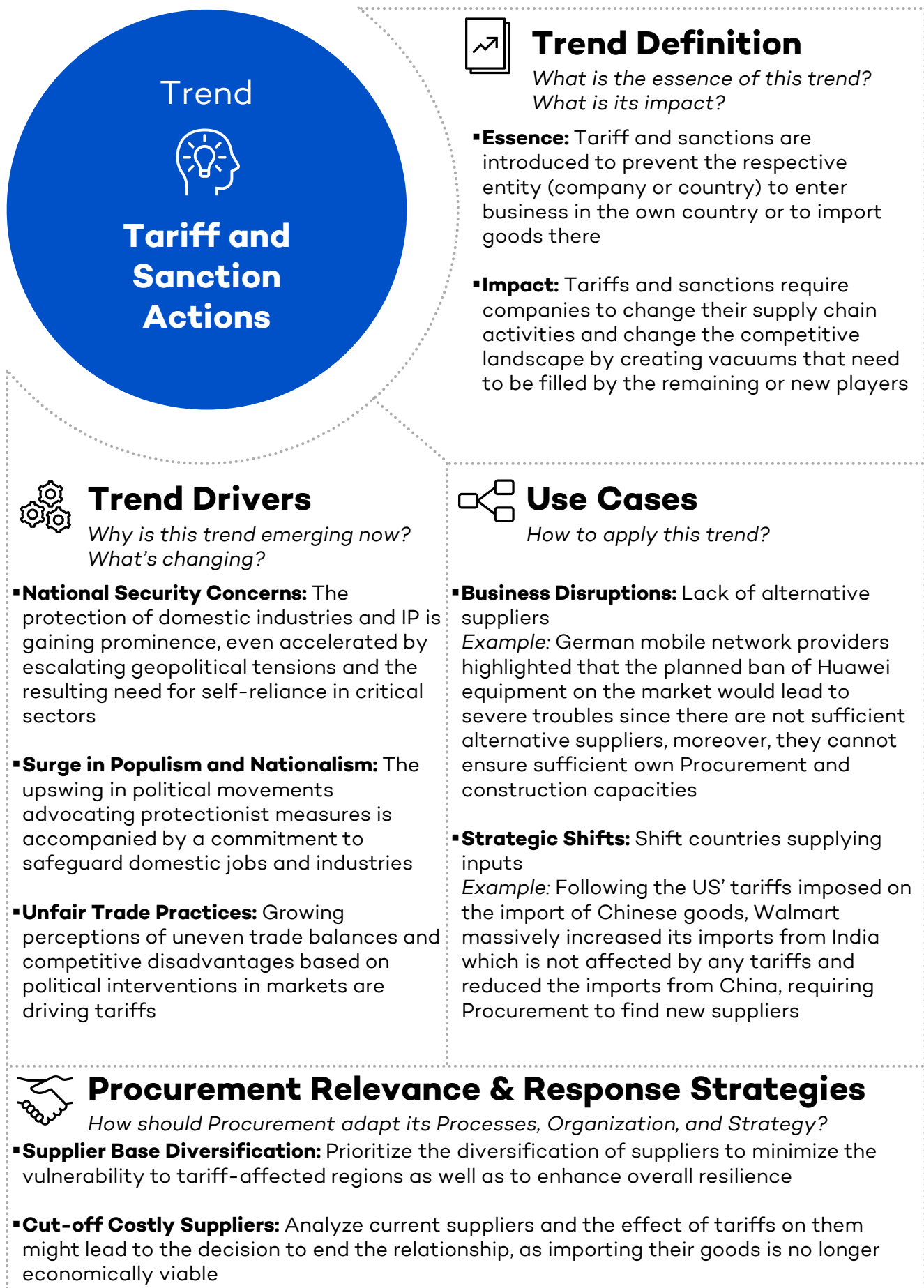
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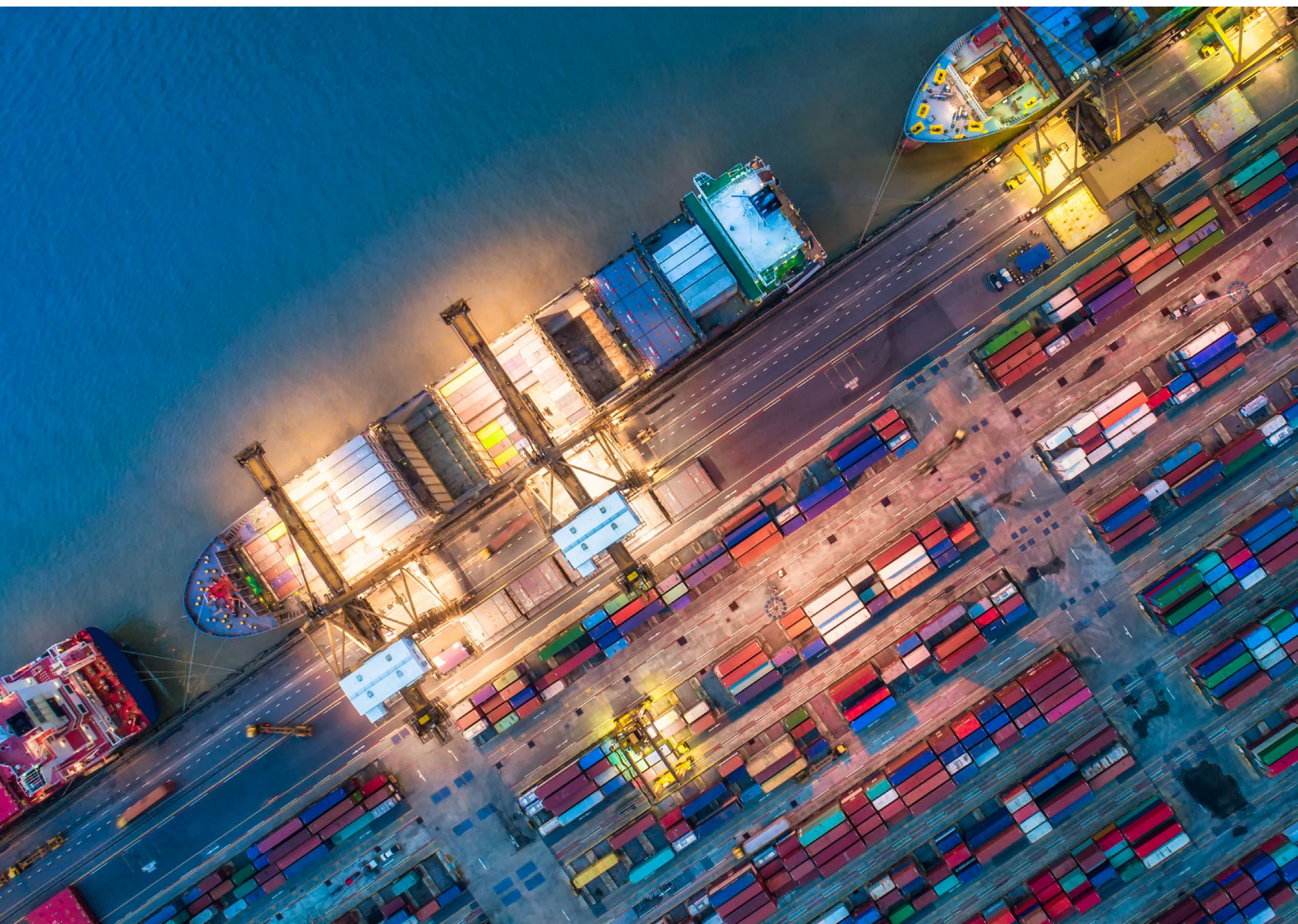
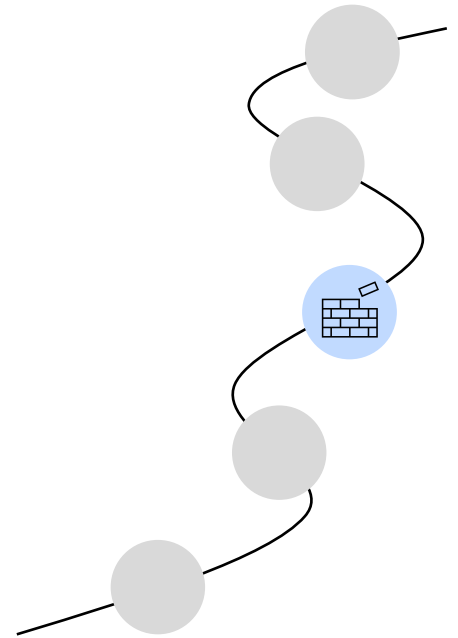


THE POLITICAL WINDS OF CHANGE: HOW PROCUREMENT LEADERS CAN HARNESS THE POWER OF GEOPOLITICS TO DRIVE SUCCESS



Risk & Resilience

In an era defined by global volatility and uncertainty, managing risks and building resilience has never been more critical. Procurement today is constantly reshaped by geopolitical shifts, supply chain disruptions, natural disasters, and unforeseen global crises (e.g., Middle-East conflict, Russian-Ukrainian War). Organizations must not only anticipate these risks but also develop robust strategies to withstand and recover from them. In the following chapter, we identified four refined Risk Management & Resilience trends that are analyzed in detail: Diversification & Localization, Crisis Resilience, Supplier Risk Management & Visibility, Sourcing Agility, Procurement-As-a-service, and Inflation Management.



NAVIGATING UNCERTAINTY: BUILDING RESILIENCE FOR AN UNPREDICTABLE WORLD



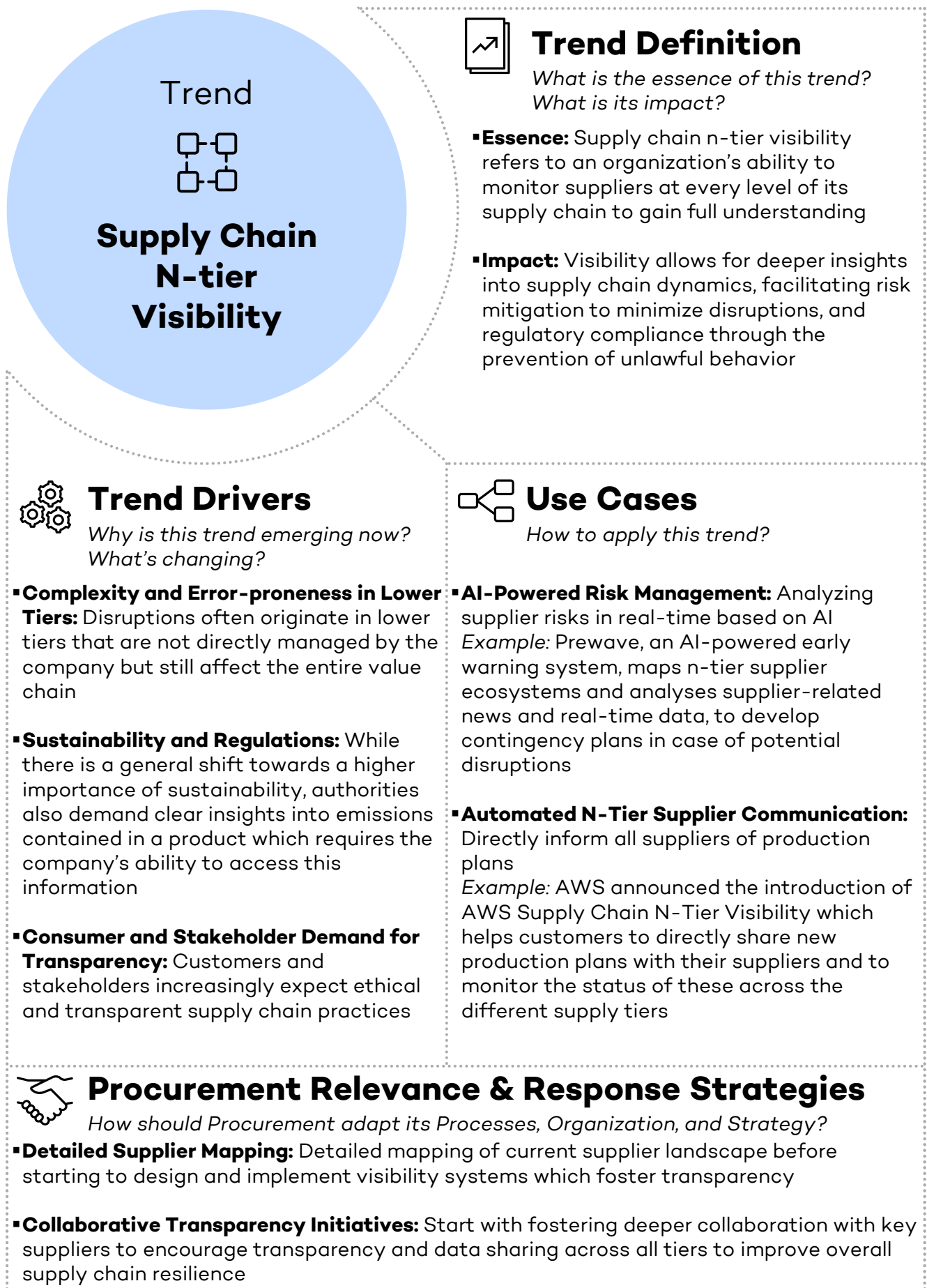
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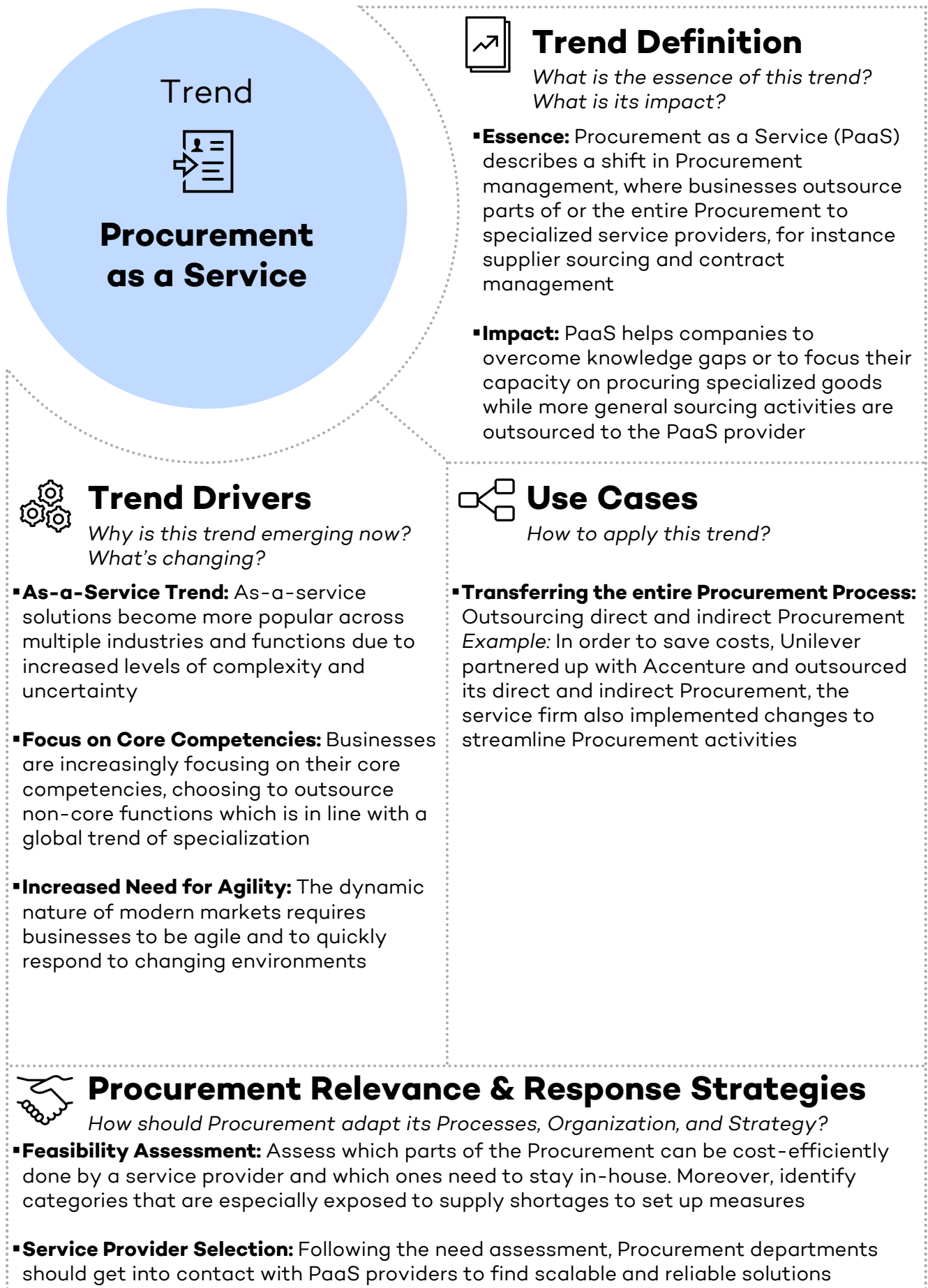
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ECONOMIC AGILITY: ADAPTING TO THE DIGITAL ERA AND INFLATION CHALLENGES



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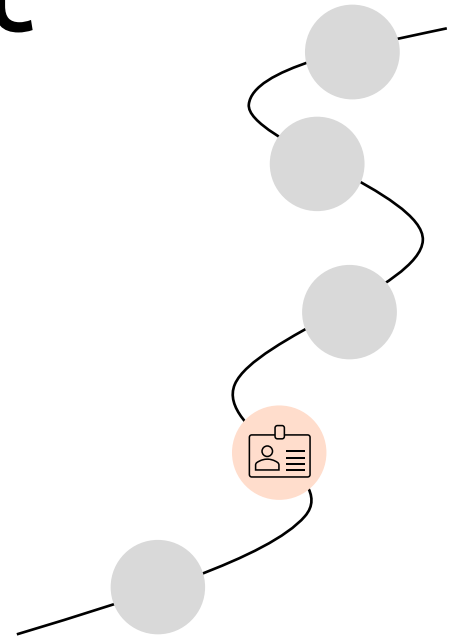


ECONOMIC AGILITY: ADAPTING TO THE DIGITAL ERA AND INFLATION CHALLENGES



Talent Management

As Procurement functions become more complex and strategic, the need for a highly skilled and adaptable workforce is undeniable. Organizations seek to attract, develop, and retain the skilled professionals they need to succeed in a rapidly changing environment. The future of Procurement will be characterized by even greater complexity, uncertainty, and competition, making it essential for Procurement teams to have the talent and skills necessary to navigate these challenges. In the following chapter, we identified three refined Talent Management trends that are analyzed in detail: Talent Shortage & Adaptive Employment Strategies, Innovative Coaching & Talent Impact, and New Work Trends.



WAR FOR TALENTS: RETAIN SKILLED WORKFORCE IN PROCUREMENT INDUSTRY



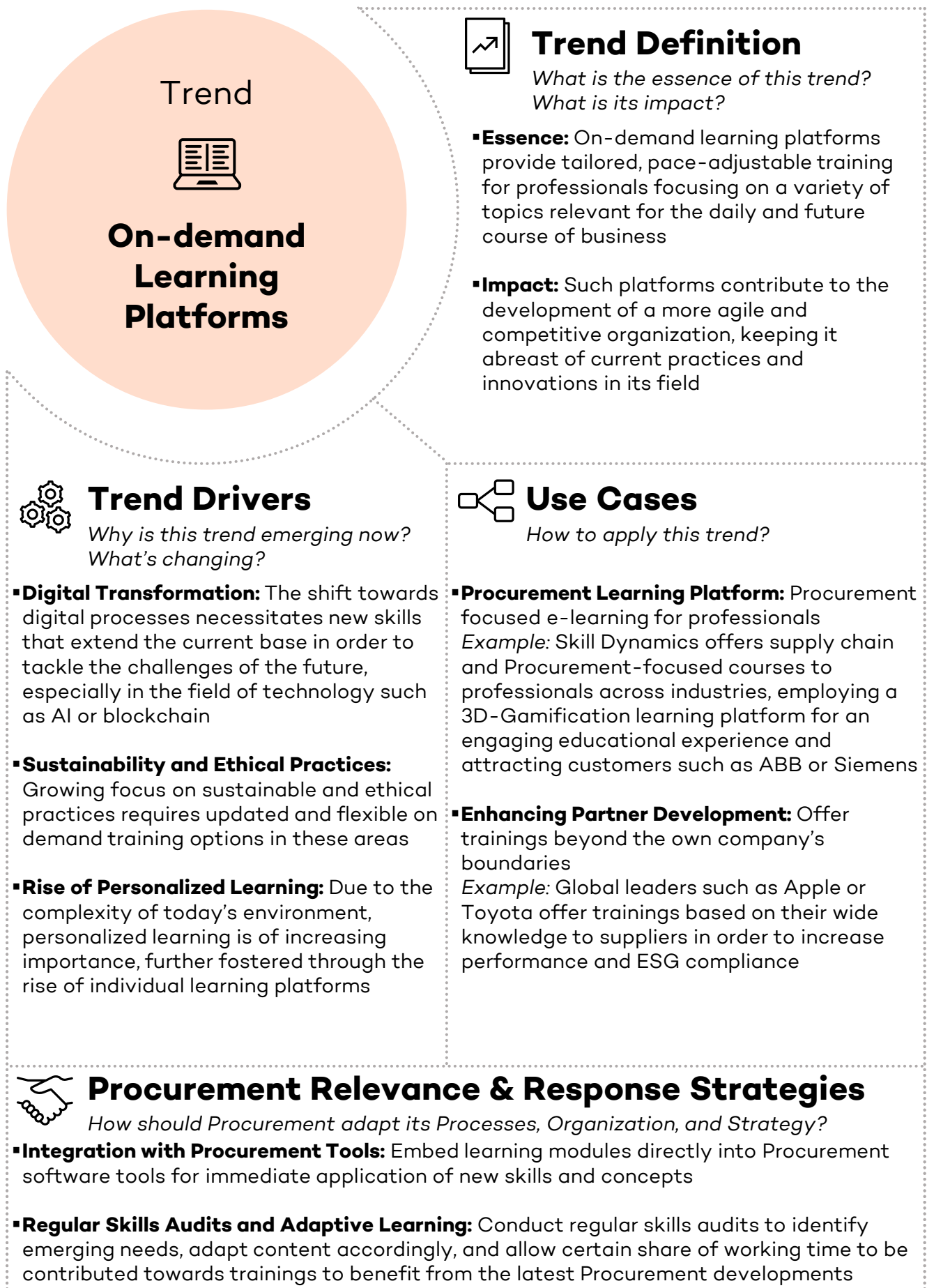
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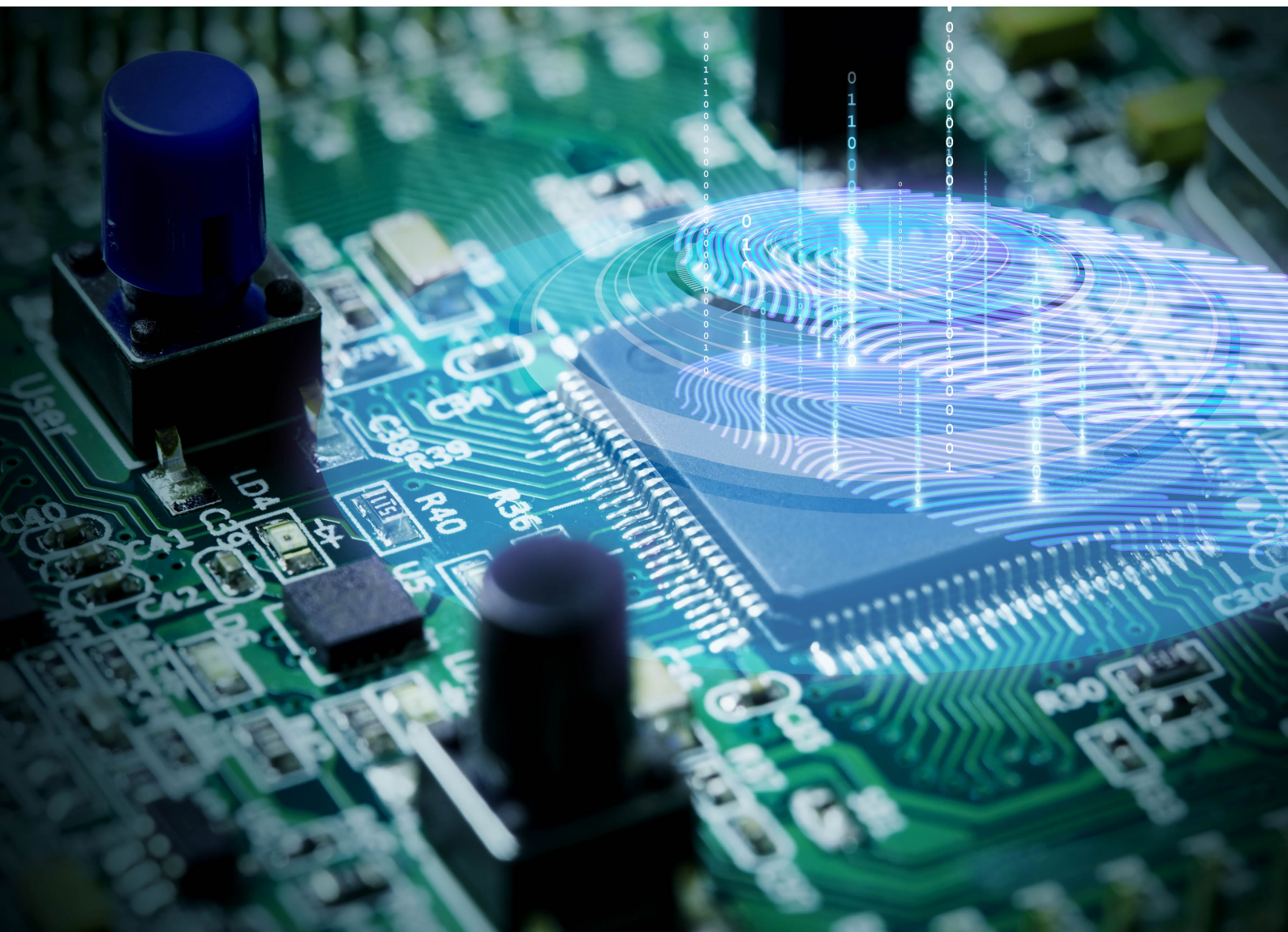
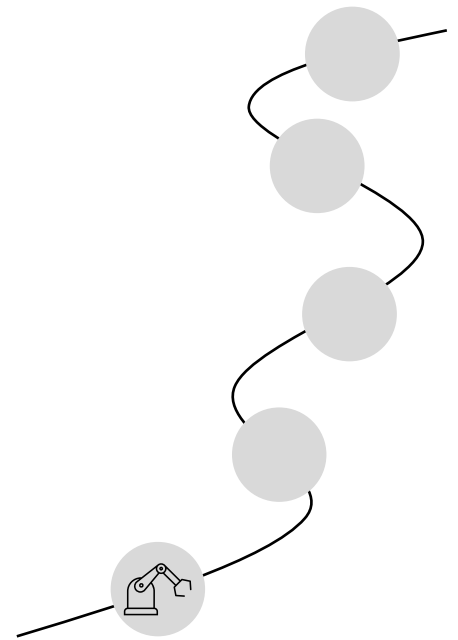


WAR FOR TALENTS: RETAIN SKILLED WORKFORCE IN PROCUREMENT INDUSTRY



Technology & Automation

Technological trends are revolutionizing source-to-contract and procure-to-pay Procurement processes. From integrating Best of Suite (e.g., SAP Ariba) to deploying Best of Breed software solutions using latest technology (e.g., robotics and artificial intelligence), organizations are striving for greater efficiency, cost-effectiveness, and agility. Understanding and leveraging these technological advancements is essential for staying competitive in Procurement. In the following chapter, we identified six refined Technology and Automation trends that are analyzed in detail: AI & Machine Learning, Blockchain & Digital Identity, Virtual World Integration, Advanced Technologies, Smart Logistics, and Process Standardization & Automation Tools.



EMERGING FROM THE STORM: NAVIGATING THE FUTURE OF SUPPLY CHAIN TECHNOLOGY



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Trend



Digital Twins for Supply Chain



Trend Definition

*What is the essence of this trend?
What is its impact?*

- **Essence:** Digital supply chain twins and the enterprise metaverse are digital representatives of their real-life counterparts that allow scenario analysis, predictive maintenance, and stress testing
- **Impact:** Digital twins enable companies to optimize their supply chains activities by identifying bottlenecks, enhancing efficiency and predictability, stress-testing and creating transparency regarding the impact of changes and events along the supply chain



Trend Drivers

*Why is this trend emerging now?
What's changing?*

- **Improved Data Foundation:** Rapid growth in IoT, AI, and cloud computing enables more sophisticated digital replication of physical supply chains and the thorough simulation of various events to make early adjustments due to an improved data collection and availability
- **Need for Resilience:** Increasing global supply chain disruptions necessitate more robust predictive and responsive solutions
- **Demand for Efficiency:** Pressure to reduce costs and downtime while improving productivity as well as an increasing awareness for sustainability drive the adoption of advanced digital solutions



Use Cases

How to apply this trend?

- **Stress Testing in Logistics:** Supply chain twins are used for dynamic simulation and stress testing, enabling proactive management of potential disruptions
Example: DHL's usage of digital twins helps in the management of container fleets, monitoring shipments, and logistics systems
- **Alternative Materials:** Simulation of CO2 emissions caused by different materials
Example: Microsoft used digital twins to simulate how replacing wood by alternative materials in sourcing of their pallets can reduce carbon emissions

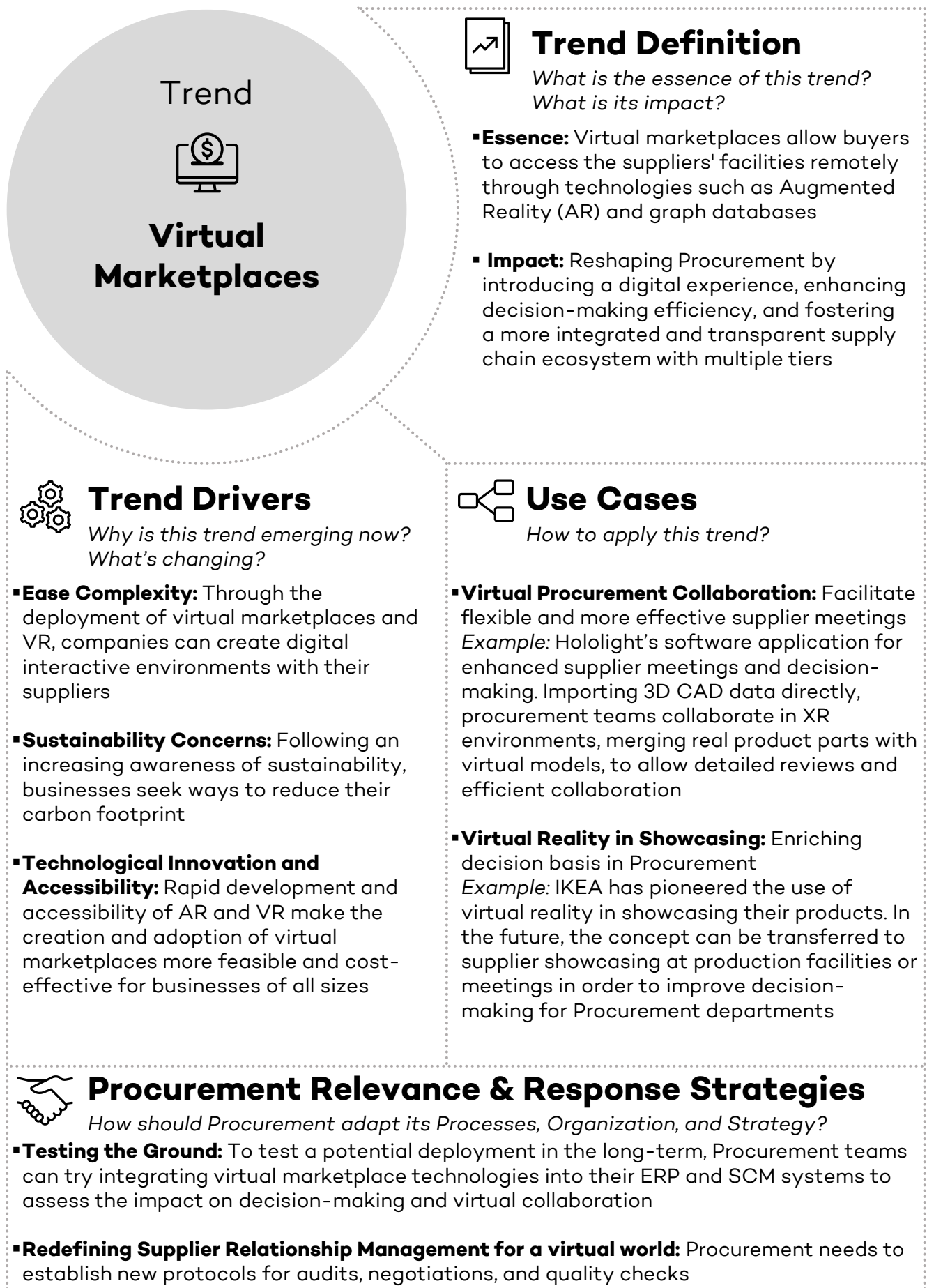


Procurement Relevance & Response Strategies

How should Procurement adapt its Processes, Organization, and Strategy?

- **Laying the Foundation:** Start collecting data, introduce simulation software and conduct simulations, for instance using JAGGAER or ivoflow, to enable a profound preparation for extreme events through the identification of bottlenecks
- **Predicting Disruptions:** Using results of digital twin analysis can help mitigating risks of supply outages

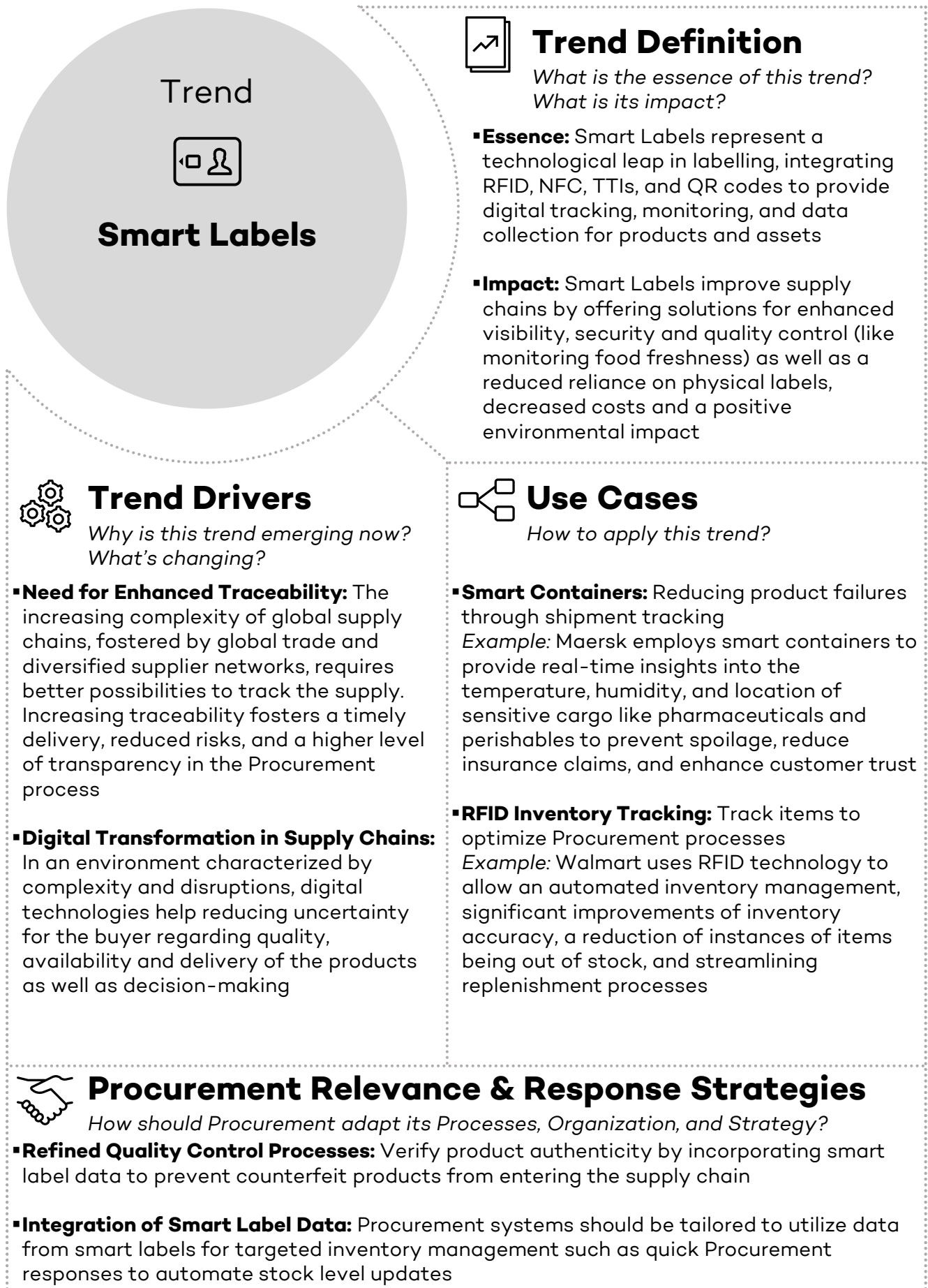
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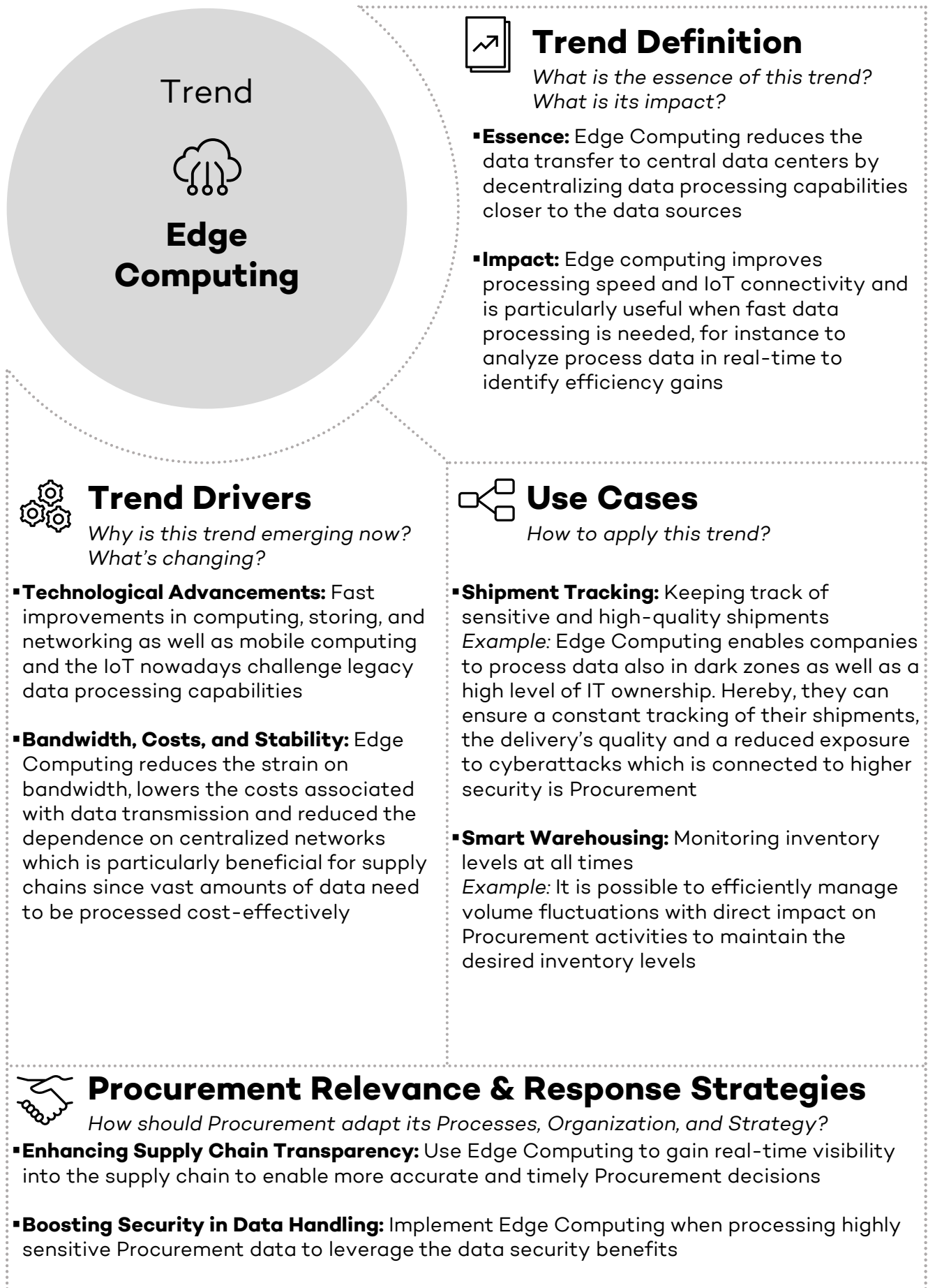
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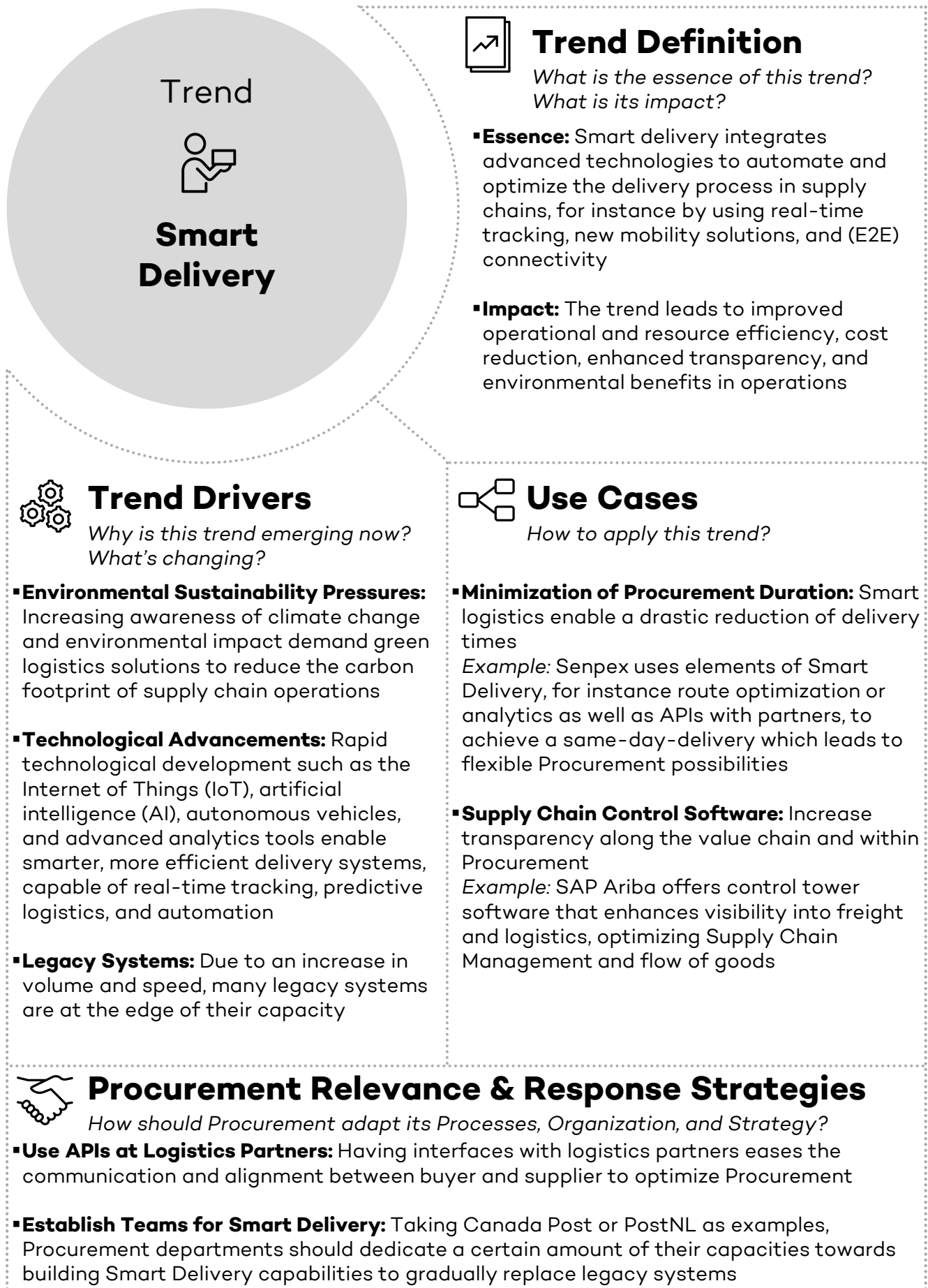
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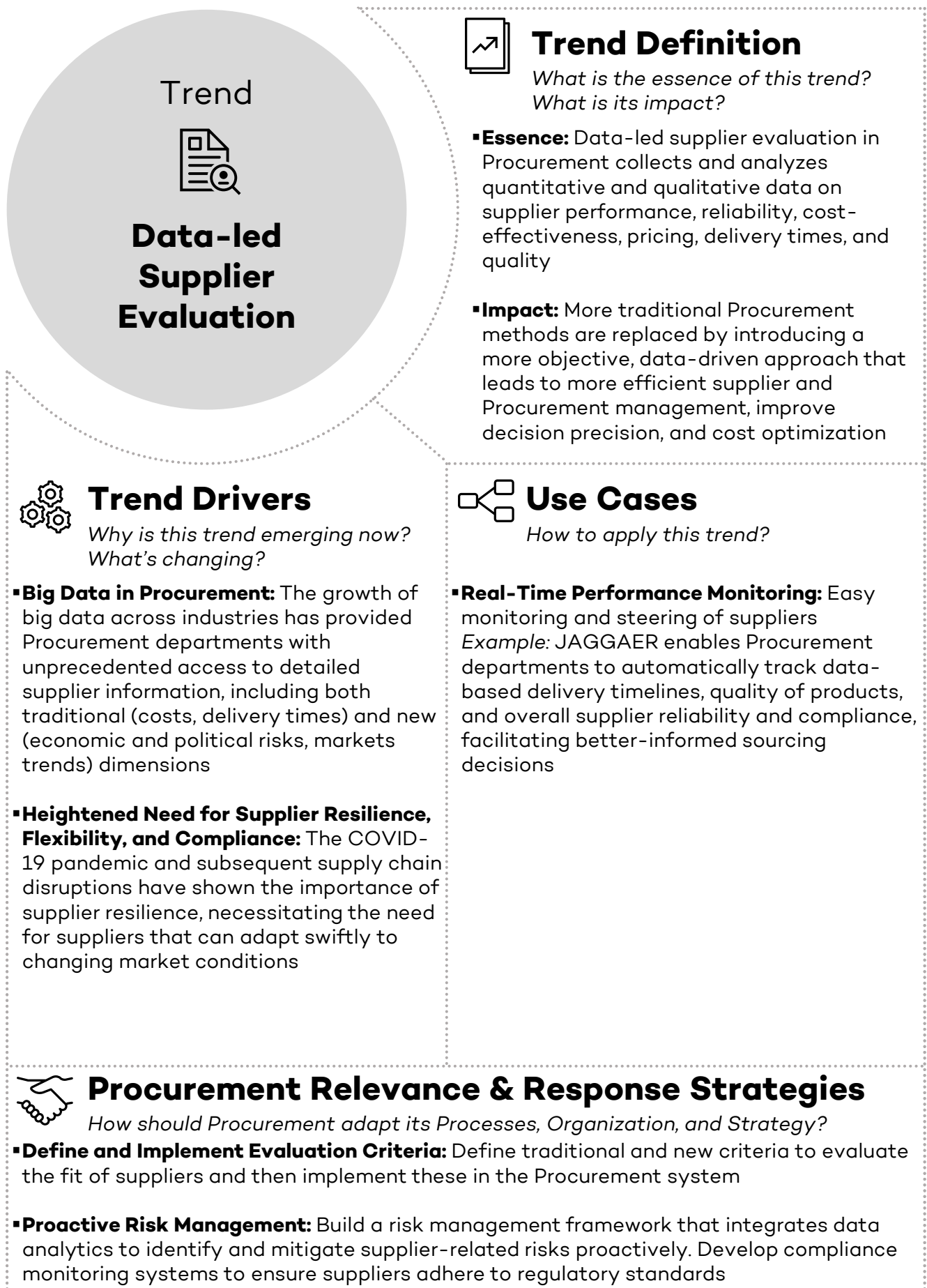
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EMERGING FROM THE STORM: NAVIGATING THE FUTURE OF SUPPLY CHAIN TECHNOLOGY



ABOUT THE PROCUREMENT INITIATIVE



The Procurement Initiative is a modern think tank and a platform for people who want to shape the future of Procurement. We live in a world where uncertainty and crises are the new normal. And that is exactly why we believe in a new purpose of Procurement: to take full responsibility for creating and orchestrating global Supply Chains that positively impact the needs for viable and sustainable businesses, a prosperous society, and a healthy planet alike.



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