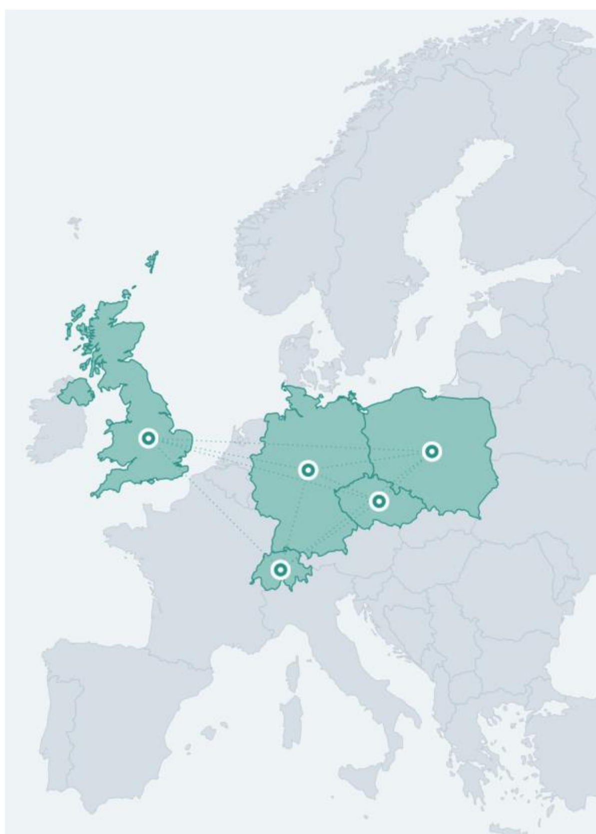
A 2026 EUROPEAN PROCUREMENT SURVEY

Lost in Translation

What senior procurement leaders across Europe really think about how they are measured, where cross-border work breaks down, and whether the function is finally being heard.



AN SPL PARTNERS REPORT

By Miroslav Pitlanic · Founder, SPL Partners · June 2026

EXECUTIVE SUMMARY

The function is rising. The way we measure it has not caught up.

This report is built on candid answers from 21 senior procurement leaders across the United Kingdom, Germany, Switzerland, the Czech Republic and Poland. Most run direct and indirect procurement in manufacturing and industrial businesses. These are the people who award the contracts, manage the suppliers and answer to the board. I asked them what is really going on in 2026, and the answers were honest in a way surveys usually are not.

57%	1 in 5	57%
measured mainly on year-on-year savings	believe savings is the right measure for 2026	say procurement is gaining strategic influence

The headline is a gap. Procurement is being asked to do more, and most respondents feel the function is gaining ground in their business. But the scorecard they are held to has not moved with them. Twelve of the twenty-one are still judged mainly on year-on-year savings. Only four believe that is the right test for 2026. That tension runs through the whole report, and it is the thing I keep meeting in the field.

Five things the data tells us

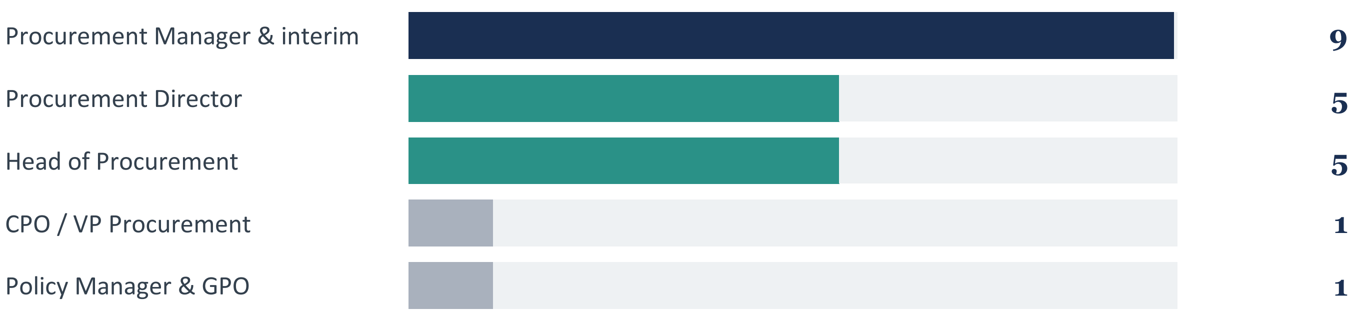
- **The measurement gap is real.** Most are measured on savings. Most do not believe savings is the right measure. The board and the buyer are looking at different scoreboards.
- **Cost has not gone away.** Despite all the talk of AI and ESG, cost savings is still the single biggest pressure named, by a clear margin. The basics still pay the bills.
- **Cross-border friction is about pace, not money.** When European teams work together, the friction shows up first in speed of decision-making and communication style. Not in price.
- **We misread each other constantly.** UK teams are seen as transactional but call themselves commercially sharp. German teams call it a marathon, not a sprint. Central and Eastern Europe feel underestimated.
- **The mood is cautiously up.** More feel procurement is gaining influence than losing it. The recognition just has not reached the scorecard yet.

WHO ANSWERED

A small, senior, deliberately qualitative sample

Twenty-one senior procurement leaders took part. This is not a large-scale benchmark, and it does not pretend to be. It is a focused read of how senior, cross-border practitioners see their world in 2026. The value is in the seniority and the honesty of the people answering, and above all in the open comments, which is where the real picture lives. With a sample this size the percentages are indicative, not statistically representative, and I have treated them that way throughout.

By role



By sector

Mostly manufacturing — industrial and machinery, automotive, and consumer goods. With a smaller group from services, energy, life sciences, telecoms, finance and public procurement.

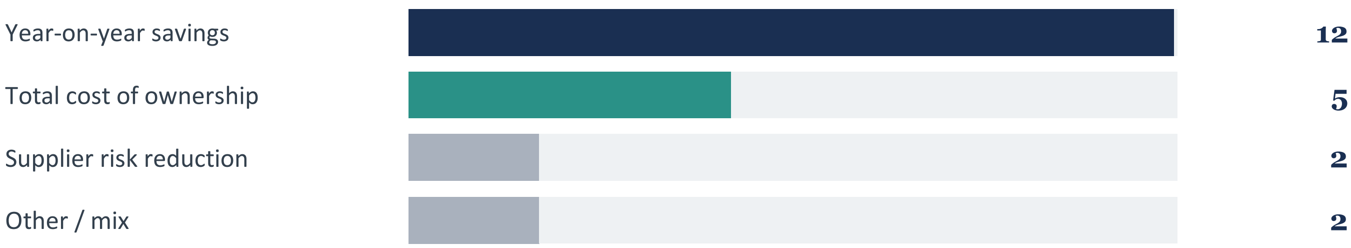
A note on honesty

One respondent told me, fairly, that asking people to pick a single biggest pressure is cruder than asking them to rank several. He is right, and I have kept that in mind reading the results. Where the data is thin or split, I have said so. I would rather give you an honest read of twenty-one senior voices than a confident-sounding read of numbers that cannot carry the weight.

FINDING ONE

Measured on savings. Convinced it is the wrong measure.

This is the strongest signal in the whole survey. Twelve of the twenty-one are measured by their CFO or board mainly on year-on-year savings, with a further five on total cost of ownership. So the scoreboard is overwhelmingly about cost.



Then I asked whether that is the right way to measure procurement in 2026. Only four said yes. Thirteen said partly. Four said no outright. So the people being measured on savings mostly do not believe savings is the right test of whether they are doing the job well.

My read

This is the gap I see again and again. Savings is easy to count, so it gets counted. But the things that actually protect a business — a supplier who flags a problem early, a base that holds when one source fails, a total cost that quietly drops because the spec got better — rarely show up as a clean number on the savings line. The board measures what is easy to measure. The buyer knows the real value sits somewhere else. Until those two scoreboards line up, procurement will keep being judged on the narrowest part of what it does.

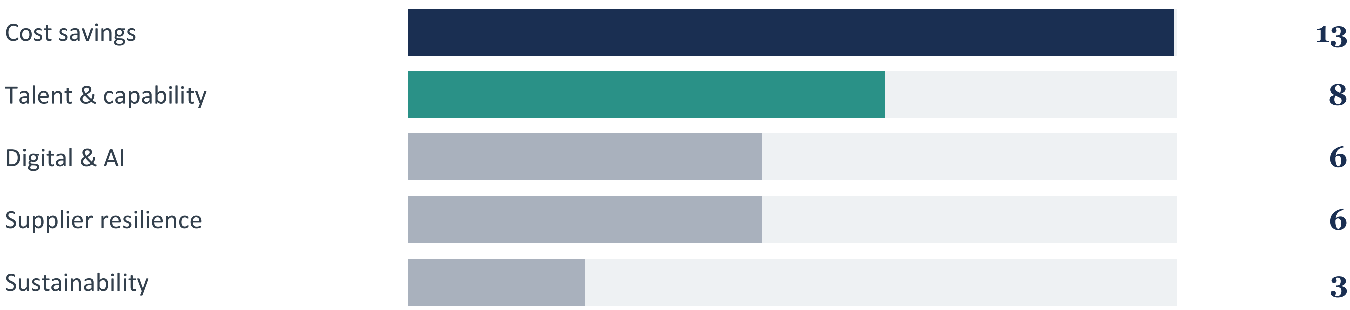
In their words

> *"There is a persistent perception that procurement is primarily focused on cost reduction. In reality, recent macroeconomic pressures have forced cost discipline as a short-term survival mechanism, not a strategic end state. The real opportunity lies in shifting towards value creation."*
> **Sarah, Founder & Researcher, Wise Stripes — United Kingdom**
>
> *"Stop considering savings the most important KPI and start modern procurement."*
> **Emad Salhab, Procurement Policy Manager & GPO — Czech Republic**
>
> *"We focus on year-over-year savings instead of TCO. Procurement is involved in the process too late."*
> **Interim Procurement Manager, ProcurExpert — Poland**

FINDING TWO

Cost is still the pressure that wins

For all the noise about AI and sustainability, the biggest pressure named in 2026 is still cost savings, by a clear margin. Talent and capability comes next, then digital and AI, and supplier resilience close behind. Sustainability and ESG, despite years of being called the next big thing, sits last on this list of pressures.



A useful disagreement

One respondent pushed back on the AI question directly, and I think it is worth quoting because it captures a real divide in the profession right now.

> *"AI adoption is too early to be a concern for the vast majority. It will be in 2027 in a big way, but 2026 is too early to be a priority, in my humble opinion."*
> **Procurement Manager (anonymous)**

That is the honest split. Some teams are already building AI into how they source. Others see it as next year's problem and this year's distraction. Both are in this data. What unites them is that cost still pays the bills, and the basics still come first when the board is watching.

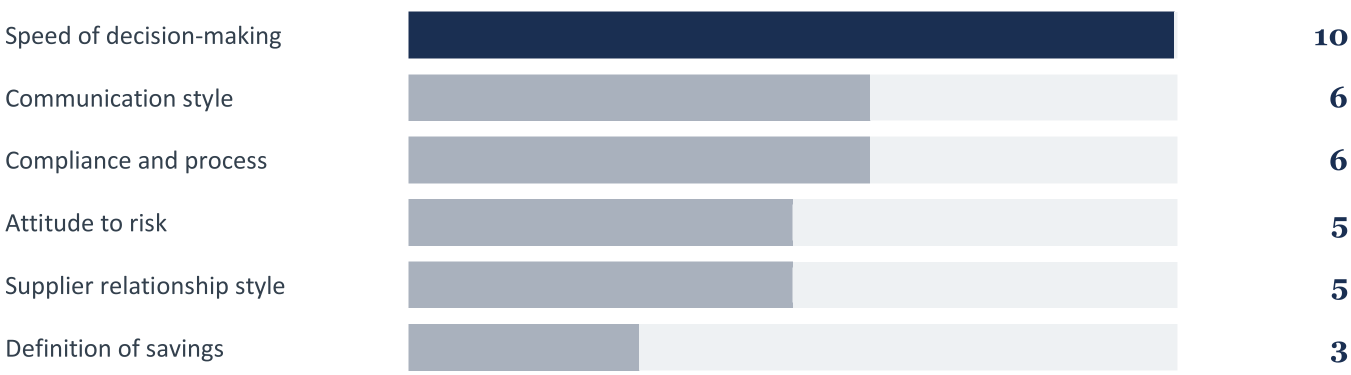
Talent is the quiet one

Talent and capability being the second most-named pressure is easy to skip past, but it matters. You cannot run modern procurement — resilience, total cost, supplier development — with a team built and rewarded only to chase savings. The capability gap and the measurement gap are the same problem seen from two angles.

FINDING THREE

Cross-border friction is about pace, not price

This is the heart of the "lost in translation" theme, and the data is clear. When these leaders work with procurement teams in other European countries, the friction shows up first in the speed of decision-making, named twice as often as anything else. Then communication style and compliance and process. Notably, "definition of savings" — the actual money — comes last.



My read

People assume cross-border procurement breaks down over price or terms. It does not. It breaks down over pace and how people talk to each other. One team thinks the other is dragging its feet. The other thinks the first is reckless. Nobody is wrong about the work. They are reading each other's rhythm and style through the lens of their own, and getting it wrong. That is a translation problem, not a commercial one, and it is exactly the kind of thing that never appears in a savings report but quietly costs weeks.

In their words

> *"UK-based teams often assume the rest of Europe operates with similar levels of centralisation and speed. In reality many countries have more decentralised, relationship-driven, and slower decision-making structures."*
> **Procurement Manager — United Kingdom**
>
> *"They do not understand that we view procurement as a marathon, not a sprint. The decisions turn out right only in the long-run perspective, like the short supply chains."*
> **Head of Procurement — Germany**

FINDING FOUR

Everyone thinks everyone else is slower, or more bureaucratic, than they really are

The open comments were the richest part of this survey, and they tell a consistent story. Procurement teams across Europe carry confident, and often wrong, pictures of how the others work. The misreadings are remarkably symmetrical.

The stereotype	What they say about themselves
The UK is transactional and cost-obsessed	"Commercially sophisticated, balancing value, risk and speed." The focus on governance and contracts has a commercial purpose behind it.
Germany and DACH are slow and formal	"A marathon, not a sprint." Slower decisions that turn out right in the long run, built on relationships and short supply chains.
Central and Eastern Europe is less advanced	Underestimated, with best practice that others miss. "UK teams underestimate the ones in Central and Eastern Europe and miss out on opportunities."

My read

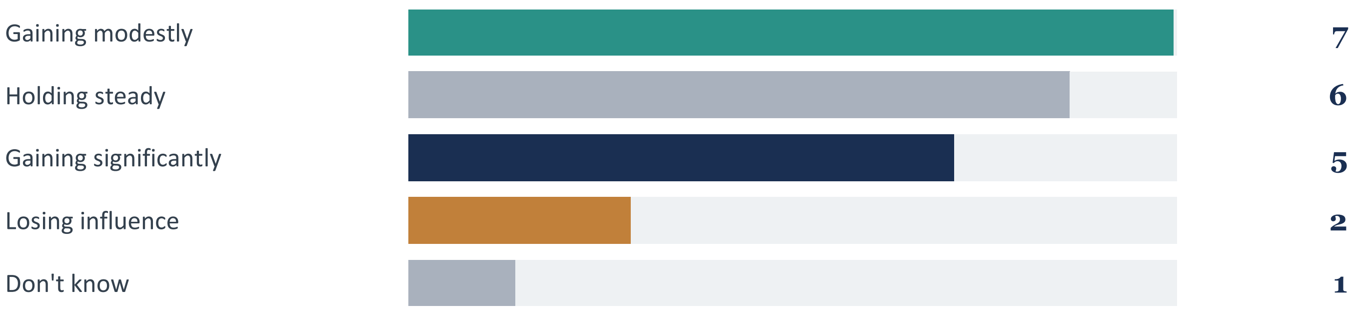
Read those side by side and the pattern jumps out. Nobody describes themselves the way the others describe them. The team that looks slow from outside calls itself careful. The team that looks transactional calls itself commercially sharp. The region that gets underestimated has best practice the others never come to learn. This is the real cost of working across borders without taking the time to understand how the other side actually operates. Not malice. Just translation, done badly.

One story stayed with me. A respondent working under a Japanese parent company found a million in plain cost savings on an un-benchmarked contract, then had to adopt the local corporate style before a single peer would engage. Even then, only a quarter of the saving got picked up. The money was never the hard part. The translation was.

FINDING FIVE

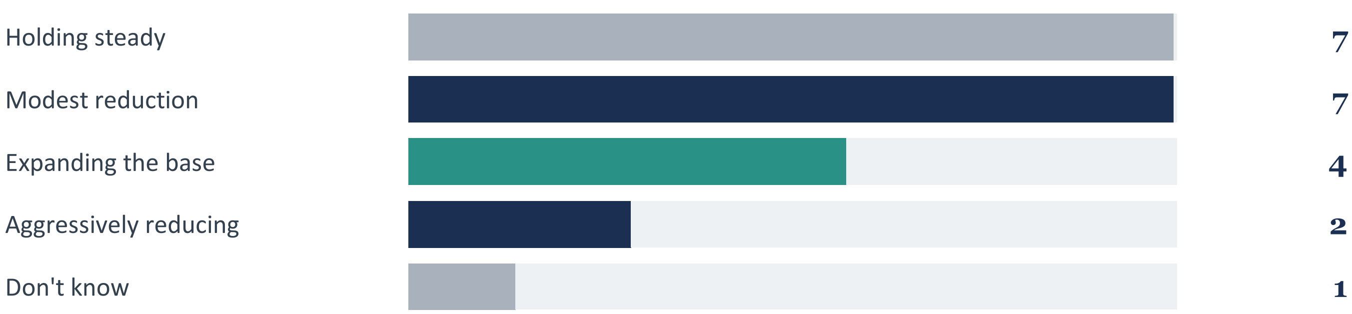
The mood is cautiously up

For all the frustration about measurement, the direction of travel is positive. More respondents feel procurement is gaining strategic influence than losing it. Seven say gaining modestly, five gaining significantly, six holding steady. Only two feel they are losing ground.



And the supplier base is not collapsing

One thing worth flagging, because it cuts against the usual narrative. There is a lot of talk about aggressive supplier consolidation. The data does not show it. Most respondents are holding steady or reducing modestly. As many are expanding their base as cutting it hard. Resilience and dual sourcing are clearly tempering the old instinct to consolidate for its own sake.



My read

Put the two together and you get a function that is being taken more seriously, managing its supplier base with more care than the headlines suggest, and still being judged on a scoreboard built for a simpler time. The influence is rising. The recognition — the kind that shows up in how you are measured — is lagging behind it. That lag is the opportunity.

IN THEIR OWN WORDS

What they would change about cross-border procurement

I asked everyone to name one thing they would change. The answers clustered around three themes: harmonisation, earlier involvement, and a shared definition of what good actually means.

On harmonisation and transparency

> *"Implement a compulsory, single digital EU procurement platform that replaces fragmented national portals. This would eliminate the 80% of procurement activity that remains hidden from cross-border competition, allowing SMEs easy access and ensuring full transparency."*
>
> **Procurement Director — Switzerland**
>
> *"Shift from a compliance and tax-optimisation mindset to a growth and resilience model. A more harmonised, pro-growth framework would unlock investment and strengthen Europe's industrial base."*
>
> **Sarah, Founder & Researcher, Wise Stripes — United Kingdom**

On involving procurement earlier

> *"Involving procurement from the very beginning will yield results. The buyer will fully understand what they are purchasing and negotiating. Their insights can play a vital role in the project's success."*
>
> **Interim Procurement Manager, ProcurExpert — Poland**

On a shared definition of value

> *"Common goal definition, and an understanding that supports not only short-term savings but overall company profitability."*
>
> **Procurement Manager & Head of Procurement — Switzerland**
>
> *"The speed of actions needs to match the speed of change happening around us."*
>
> **Procurement Director — United Kingdom**

WHAT I TAKE FROM THIS

The translation problem is the real one

I ran this survey because I work across these markets and I kept noticing the same thing. The hard part of European procurement is rarely the price, the spec or the contract. It is that we measure the wrong things, and we misread each other constantly. The data backed that up more clearly than I expected.

Three things I will be carrying forward

1 Fix the scoreboard before you fix anything else.

If procurement is measured only on savings, it will behave like a savings function, however much you talk about value. The measure shapes the behaviour. Most leaders here know it, and most are stuck with a scoreboard that no longer fits the job.

2 Pace and communication are where cross-border value leaks.

Not price. If you run procurement across countries, the time to invest is in understanding the other side's rhythm and style, before the first deadline, not after it slips. The friction is a translation problem, and translation can be learned.

3 The recognition is coming. Get ahead of it.

The function is gaining influence. The smart move is to start measuring and talking about procurement in the language of value and resilience now, so that when the board catches up, you are already speaking it.

Thank you

To everyone who took the time to answer honestly, and especially to those who added comments that went well beyond the questions. The numbers set the frame. Your words filled it in.

About the author

Miroslav Pitlanic is the founder of SPL Partners. He has spent 17 years in procurement and supply chain leadership across European manufacturing — with Honeywell, Eaton, Terex and Kymera — building and transforming procurement functions in the UK and the DACH region. He works in five languages and across the markets this report covers. SPL Partners helps manufacturers build, fix and run procurement functions that remove friction rather than add it.

miroslav.pitlanic@spl-partners.co.uk · linkedin.com/in/miroslav-pitlanic

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A note on method and attribution: respondents surveyed June 2026 across five European countries. Respondents are quoted only as they consented — named where they asked to be named, by role and country where they asked for an anonymous quote, and by number only where they asked for data with no quote. Percentages are rounded. With a sample of this size, the figures are indicative, not statistically representative, and the open comments carry as much weight as the numbers.