CARE

Center for the Advancement of Research and Excellence

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# The State of the Public Procurement Profession

## TRENDS, INSIGHTS, & OUTLOOK



2026

# Acknowledgements

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# Foreword:
## The Work You Do Matters

**Every day, public procurement professionals safeguard public trust, steward taxpayer resources, and ensure communities receive the goods and services they rely on—often under intense scrutiny, shifting regulations, constrained resources, and growing expectations. Much of this work happens behind the scenes, but its impact reaches far beyond procurement offices and into the lives of the communities you serve.**

I am still new in my role as CEO of NIGP—and new to the world of procurement. In my first months of listening, learning, and engaging with members, several things have become abundantly clear: public procurement professionals are resilient, deeply committed, and continuously asked to do more with less—while holding fast to the values of integrity, ethics, and fairness that define this profession.

**This *State of the Public Procurement Profession* report is written for you.**

It is not meant to be a retrospective for its own sake, but a practical reflection on the year behind us and a forward-looking resource to support the work ahead. Inside, you will find a year-in-review that highlights the policy shifts, market forces, and operating realities that shaped procurement practice over the past year—alongside insights that remain relevant as you plan, adapt, and lead moving forward.

You will also find what the data tells us. Drawing from NIGP's most recent benchmarking, compensation, and retention research, as well as emerging academic work through the Center for the Advancement of Research and Excellence (CARE), this report offers evidence-based insight into the state of our workforce, roles, and responsibilities. Research matters—not as an academic exercise, but as a tool to inform better decisions and strengthen the profession's future.

# FOREWORD

Equally important are the voices included here. Throughout this report, you will hear directly from procurement professionals on the front lines—people navigating real-world challenges, driving innovation, and building practical, creative solutions that make a difference. Their stories reflect perseverance and a deep commitment to public service. They also carry an important message for leadership: what practitioners need, what they value, and what helps them succeed.

Looking ahead, this report intentionally focuses on the future. Trends matter—but if we are merely following trends, we are already behind the curve. The procurement profession must stay forward-facing: anticipating change, preparing for disruption, and building skills and systems that will serve communities tomorrow, not just today. From technology and talent development to sustainability, trade, and agility, the trends highlighted here are meant to spark curiosity, conversation, and strategic redirection.

**Finally, this report is a call to action.**

Investing in the profession is not optional, it is essential. Most of us can point to mentors who guided us, challenged us, and helped shape our careers, and we honor that legacy when we pay it forward by encouraging and supporting the next generation of procurement professionals. In that same spirit, this report reflects the values that already anchor the profession—service to others, integrity, ethics, and values-driven leadership. When we lead with purpose, advocate boldly for the value of procurement, and support one another with intention, the future of public procurement will be strong.

**NIGP is proud to stand with you in that work—and proud to support the people who advance it every day.**



**Debbie Trueblood,** MSW, FASAE, IOM, CAE

Chief Executive Officer

NIGP: The Institute for Public Procurement



# A Year in Review:
## What Shaped Us

### POLICY & REGULATORY UPDATES

The past year has been one of recalibration for public procurement. 2025 marked a decisive turn in the policy environment at every level of government—federal, state, and local—as agencies adjusted to economic pressures, cybersecurity mandates, and a pronounced political realignment around diversity, equity, and inclusion (DEI). While modernization and accountability continued to shape procurement reform, the most striking development was the federal retreat from DEI initiatives and the ripple effects that followed across the states.

**Federal Developments: From Modernization to Ideological Shift**

At the federal level, procurement policy advanced on two tracks—continued modernization and intensified regulation. The Office of Management and Budget (OMB) and the General Services Administration (GSA) refined guidance on sustainable procurement, e-invoicing, and supplier risk management, while the Department of Defense proceeded with the rollout of the Cybersecurity Maturity Model Certification (CMMC 2.0) framework to strengthen contractor cyber-readiness. Inflation and infrastructure spending under the Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) continued to influence contract pricing and sourcing strategies, prompting OMB to issue additional direction on escalation clauses and domestic sourcing compliance.

Yet these operational updates were overshadowed by a sweeping ideological shift. In early 2025, the administration issued the Executive Order Ending DEI and Affirmative Action for Federal Contractors and Grant Recipients, rescinding the previous equity-in-contracting directives. The order prohibits federal agencies from considering DEI-related criteria in procurement or grant awards and requires contractors to certify that they do not employ "illegal DEI practices" in hiring, subcontracting, or supplier selection (Akin Gump 2025). Guidance from the Office of Federal Contract Compliance Programs (OFCCP) and the Federal Acquisition Regulation (FAR) Council clarified that any race- or gender-based preferences, even when historically tied to outreach or mentorship goals, could trigger contract termination or loss of funding (Sullivan & Cromwell 2025; Dinsmore 2025).

The practical impact was immediate. Long-standing small-business inclusion programs such as the 8(a), WOSB, and HUBZone certifications—cornerstones of supplier diversity for decades—faced uncertainty as agencies worked to distinguish "statutorily authorized set-asides" from newly proscribed DEI initiatives. Many contracting officers froze or deferred equity-related outreach until compliance guidance stabilized. What had been an era of expanding equity mandates quickly transformed into a compliance-driven environment emphasizing neutrality and risk avoidance.

### State Policy Trends: Reform, Restraint, and Realignment

At the state level, legislatures continued to modernize procurement statutes to accommodate e-procurement platforms, cooperative purchasing, and digital signatures. Oversight intensified as states administered unprecedented federal infrastructure and recovery funding, emphasizing audit readiness, grant compliance, and data transparency.

However, DEI retrenchment mirrored the federal shift. Following the 2025 executive order, several Republican-led states enacted or expanded prohibitions on DEI spending in public institutions, often extending these limits to contracting and supplier programs. Statutes and executive actions in multiple jurisdictions dissolved or defunded state DEI offices, eliminated supplier diversity goals, and replaced inclusion metrics with "race-neutral economic opportunity" language (E&I Cooperative 2024).

Other states, particularly those with Democratic leadership, moved in the opposite direction—reinforcing equity frameworks, tightening MWBE certification requirements, and adopting mandatory reporting on supplier diversity spending. This produced a fragmented national landscape: some jurisdictions dismantling DEI infrastructure entirely, others embedding it more deeply into procurement and grant management systems.

**CASE SNAPSHOT**

**State and Local Success Story**

**City of Phoenix**

**City of Phoenix (U.S.):** Predictive analytics prevented supply delays, reducing project backlogs by 18% (GAO Best Practices Brief, 2024).

The divergence carries operational consequences. States curtailing DEI initiatives now face potential conflicts when administering federally funded programs that still reference equity objectives or community-benefit clauses. In contrast, states maintaining DEI programs risk audit findings or legal challenges if federal auditors interpret those activities as inconsistent with new contracting rules. Procurement officials increasingly find themselves navigating between competing compliance obligations.

### Local Government Impacts: Policy Fragmentation on the Ground

For local governments, the effects have been equally complex. Cities and counties that had embedded supplier diversity or local preference policies into their procurement ordinances are reassessing those provisions in light of state and federal directives. Some jurisdictions quietly sunset DEI offices or rebrand them under neutral titles such as "Economic Opportunity and Access" to preserve program intent while avoiding statutory conflict.

Procurement officers now confront practical questions: Can existing minority- and women-owned business (M/WBE) databases be used for outreach if

awards cannot consider demographic status? Should solicitations continue to request voluntary vendor diversity data? How should equity-related conditions in federal grants be reconciled with new prohibitions in state law?

At the same time, many localities remain committed to inclusive economic participation. Instead of direct set-asides, they are pivoting toward capacity-building, transparency, and small-business outreach as legally defensible pathways to maintain competition and community benefit. Technology is aiding that transition—e-procurement analytics and open data portals allow cities to monitor participation patterns and detect disparities without using explicit demographic preferences (Thomson Reuters 2024; StateTech Magazine 2023).

## CROSS-CUTTING THEMES: COMPLIANCE, CULTURE, AND THE ROAD AHEAD

Several overarching trends now define the national procurement landscape:

1. **Compliance and Risk Management**
   Contracting agencies are conducting legal reviews of solicitation templates, evaluation criteria, and scoring models to remove or reword any DEI language that might imply preferential treatment. Contractors are updating ethics and compliance programs to certify conformity with new federal standards.

2. **Cultural and Workforce Impacts**
   The rollback of DEI initiatives is reshaping public-sector organizational culture. Training programs on supplier diversity and inclusive evaluation have been reduced or refocused toward general procurement ethics. Some agencies report lower engagement with small or emerging vendors who previously relied on targeted outreach.

3. **Operational Reframing**
   Many entities are shifting from "equity" to "access and transparency" narratives, emphasizing fair competition, small-business participation, and open solicitation processes. This approach retains aspects of inclusion without breaching anti-DEI statutes.

4. **Technology and Data Analytics**
   The expansion of e-procurement systems, dashboards, and spend-analysis tools continues to underpin modernization. These technologies help agencies monitor participation and performance objectively—critical as qualitative DEI measures are phased out.

5. **Policy Divergence and Uncertainty**
   With federal and state directives evolving rapidly, procurement professionals must track legal interpretations and court challenges. Experts expect litigation over the scope of the federal order and state laws limiting DEI, particularly regarding conflicts with existing federal grant or civil-rights obligations.

## CASE SNAPSHOT

**Procurement Success Story**

Ontario

**Province of Ontario (CA):**
Vendor-performance dashboards integrated metrics across 1,200 suppliers (Ontario Shared Services Report, 2024).

### Enabling Public Value Across Borders

Across North America, 2025 brought renewed emphasis on transparency, inclusion, and modernization.

- **United States:** Federal contract obligations reached $759 billion (USD) in FY 2023 – up $33 billion from 2022 – highlighting procurement's strategic role in federal operations (GAO, 2024). The Small Business Administration reported record-breaking awards of $178 billion (USD) to small businesses (SBA, 2024).
- **Canada:** The federal Procurement Modernization Initiative advanced Indigenous participation, green purchasing, and open contracting under the Treasury Board Policy on the Planning and Management of Investments (2024).

Provincial and municipal entities expanded the Canadian Collaborative Procurement Initiative (CCPI), coordinated by Public Services and Procurement Canada (PSPC), achieving efficiencies while maintaining local autonomy.

Together, these developments show an aligned commitment to procurement as a strategic enabler of public value across borders.

### Canada's Procurement Revolution: How 2025 Redefined Procurement for Resilience and Growth

The Canadian public procurement landscape underwent significant transformation in 2025. Driven by global trade disruptions, domestic economic priorities, and technological innovation, procurement evolved from a compliance-focused, transactional function into a strategic tool for resilience and growth.

In November 2025, the federal government launched the ***Buy Canadian Policy*** as part of the Canada Strong Budget 2025. This landmark initiative prioritizes Canadian suppliers, materials, and services in federal procurements. Key features include:

- **Local Content Requirements:** Federal contracts now mandate Canadian content, even when foreign suppliers participate.
- **Strategic Materials Focus:** Prioritization of Canadian steel and softwood lumber for defence and infrastructure projects.
- **SME Procurement Program:** A $79.9 million investment to help small and medium-sized enterprises access federal contracting opportunities.
- **Reciprocal Procurement Measures:** By spring 2026, non-defence contracts will be limited to Canadian suppliers or trusted trade partners.

The Canada Strong Budget 2025 also introduced sweeping changes to defence procurement through the Defence Industrial Strategy and the creation of the Defence Investment Agency. These reforms aim to:

- Centralize military purchasing for greater efficiency.
- Build Canada's domestic defence industrial base.
- Support major nation-building projects under the new Major Projects Office, including Arctic corridors and critical mineral initiatives.

## CASE SNAPSHOT

**State and Local Success Stories**

**Metro Vancouver (CA):**
Social-procurement scoring increased SME participation by 12% (CPPC Case Study Series, 2024).

At the provincial level, Ontario passed ***Bill 72: Buy Ontario Act (Public Sector Procurement), 2025***, granting the Management Board of Cabinet authority to issue directives prioritizing Ontario and Canadian goods and services. This legislation underscores a broader trend among provinces to safeguard local supply chains and support domestic businesses, particularly in construction and infrastructure projects.

Escalating trade tensions with the United States had significant impact on Canada's procurement policies in 2025. U.S. tariffs on Canadian exports prompted reciprocal actions and accelerated efforts to reduce dependency on U.S. suppliers. The removal of 20 federal exceptions under the Canadian Free Trade Agreement (CFTA) expanded opportunities for Canadian suppliers promoting internal trade and harmonized procurement standards.

Several national events shaped dialogue and best practices in 2025:

- **Ontario Public Buyers Association (OPBA) Conference** (Alliston, ON): Public Sector procurement innovation, collaborative sourcing, and digital transformation.
- **Canadian Public Procurement Council (CPPC) Annual Forum** (Ottawa, ON): Sustainability, supplier diversity, and policy harmonization.
- **ProCURE 2025** (St. John's, NB): HealthTech procurement challenges and interprovincial collaboration.
- **Defense Procurement Conference** (Ottawa, ON): Evolving acquisition ecosystem under the Defence Investment Agency.
- **CIPMM National Workshop** (Ottawa, ON): Modernization strategies and professional development for procurement and materials management practitioners with the primary focus on the Canadian federal government.

Together, the federal and provincial policy changes, trade dynamics, and modernization efforts throughout 2025 highlights procurement's evolving role in shaping Canada's future.

As Canada moves into 2026, the key challenge will be balancing domestic-first procurement priorities with international obligations, while ensuring that procurement remains transparent, competitive, and aligned with broader economic and social goals.

> **"Procurement today is less about buying things and more about balancing policy, economics, and ethics."**
>
> *~ Lisa Taylor, Chief Procurement Officer, City of Calgary (CPPC Leadership Forum, 2024)*

## TECHNOLOGY & TOOLS IN ACTION

Artificial intelligence (AI) and digital tools continued to reshape public procurement in the past year. Agencies and suppliers alike adopted new solutions to speed up processes, gain insights from data, and improve transparency. At the same time, government guidelines and industry studies raised important questions about risk management and governance. This section looks back at major developments, notable adoptions, and lessons learned.

### Policy and Guidance

- **Responsible AI acquisition:** In September 2024, the U.S. Office of Management and Budget issued Memorandum M-24-18, which directs federal agencies to develop policies for the "responsible acquisition of AI." The memo stresses cross-functional collaboration, risk management, and promoting a competitive AI market to avoid vendor lock-in. Agencies must adjust procurement policies to address privacy, security, and bias issues.
- **NIGP leadership:** The Institute for Public Procurement (NIGP) created an "AI in Public Procurement" community on its NSite platform. The community has over 260 members and provides a space for sharing insights and ideas. NIGP also devoted conference tracks to AI and technology, cybersecurity, and large IT procurement, keeping its nearly 20,000 members up-to-date on technological trends.

### Adoption Trends and Survey Insights

- **Growing adoption with caution:** According to the 2025 Global CPO Survey, 80 percent of chief procurement officers plan to deploy generative AI within three years, but only 36 percent have meaningful implementations today. This gap shows that many organizations are still piloting technologies and addressing integration challenges.
- **Investment levels:** Research firm ISG found that procurement represents just 6 percent of AI use cases across enterprise functions. However, when organizations do invest, they spend between $1.0 million and $2.6 million per use case, especially in forecasting, supplier management, and risk monitoring. These figures underscore both the potential and the cost of AI adoption.
- **Benefits and use cases:** CPOs view AI as a priority because it promises efficiency gains. AI can automatically classify spend, identify savings opportunities, and detect maverick spending. Tools also support semi-automated sourcing, where AI helps write scopes of work and scores proposals. Contract management solutions now extract terms and flag risks. AI is also used in supplier management and strategic decision support.

### CASE SNAPSHOT

**Procurement Success Story**

COLORADO
Governor's Office of Information Technology

**Colorado –** AI risk assessment and procurement compliance: Colorado's Office of Information Technology (OIT) requires that all generative AI contracts, including those used in procurement, include provisions ensuring compliance with state law and data security standards. This approach ties AI governance to contract management and creates a clear statewide standard for responsible AI procurement.

## MACRO TRENDS & MARKET FORCES

**Inflation, supply-chain fragility, and workforce evolution defined the year.**

The U.S. Census Bureau noted rising state and local capital spending for infrastructure renewal and digital transformation.

In Canada, CPPC (2024) members identified supplier diversification and cost volatility as top challenges.

Workforce renewal remains urgent, as roughly one quarter of senior professionals are expected to retire within the next five years (NASPO, 2023; PSPC Workforce Outlook, 2024).

### Applications Across the Procurement Lifecycle

- **RFP development:** Procurement officials use AI to draft concise RFPs and scopes of work. Pennsylvania's deputy secretary of procurement said AI helps create shorter, technically sound scopes that reduce vendor questions. This streamlining speeds up solicitation and yields clearer responses.
- **Spend analysis:** AI automates spend categorization, identifies cost-saving opportunities, and models budgets. Such tools give procurement teams real-time insight into spending patterns.
- **Contract management:** AI engines can extract contract clauses, compare language, and assess risks. Some refer to this as "smart contract management," where AI assists legal review and ensures compliance.
- **Supplier evaluation and negotiation:** AI systems evaluate supplier performance and predict risk by analyzing historical data. Emerging platforms conduct automated negotiations around payment terms and service levels.
- **Process orchestration:** New intake tools allow users to describe what they need in plain language; AI translates these requests into structured requirements and guides users through appropriate procurement channels. This reduces friction for internal customers and ensures policy compliance.

### Challenges and Lessons Learned

The rapid adoption of AI has not been without problems. The following challenges emerged repeatedly:

- **Data quality:** AI requires large amounts of accurate data. Many agencies struggle with fragmented or incomplete procurement datasets, which limit the effectiveness of AI algorithms.
- **Integration with legacy systems:** Integrating AI tools with existing enterprise resource planning systems is costly and complex. Organizations must plan for upgrades and ensure interoperability to avoid vendor lock-in.
- **Bias and fairness:** AI systems can embed existing biases from training data. Public procurement demands fairness and transparency, so procurement leaders must monitor outputs and ensure equitable decisions.

> **"We've learned that technology doesn't replace professionals—it amplifies them."**
>
> *~ Monique Lemieux, Director of Procurement Transformation, PSPC (Procurement Innovation Symposium, 2025)*

- **Transparency and explainability:** Complex AI models can be "black boxes." When an AI tool helps select suppliers, procurement officers must be able to explain how the decision was made. Transparent algorithms and clear audit trails are essential.
- **Cybersecurity:** AI systems handling procurement data are targets for cyberattacks. Agencies need strong encryption, role-based access controls, and regular audits.
- **Change management:** Introducing AI can cause resistance among staff who fear job loss or do not trust machine outputs. Training and clear communication are critical to build confidence in new tools.

## CASE SNAPSHOT

**State and Local Success Story**

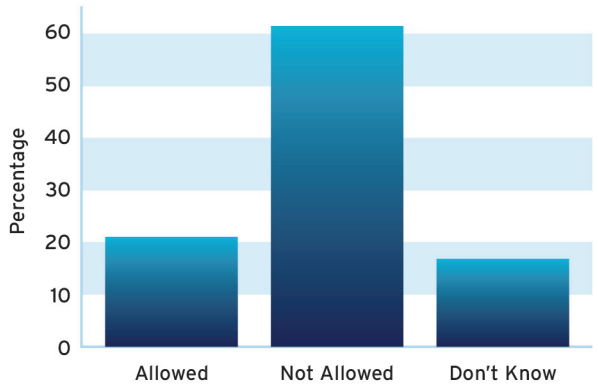
**Utah – rapid RFP generation and AI governance:** The City of Murray, Utah, used a generative AI tool to draft an RFP for a 70-foot Christmas tree in less than a month. City recorder Brooke Smith, NIGP-CPP, explained that AI helped her communicate with subject matter experts, produce a detailed RFP quickly, and update procurement forms with clearer language. To manage risks, the city created an AI committee to create an AI Policy, and train employees. This early success illustrates how small municipalities can harness AI while maintaining human oversight.

### Looking Ahead

The past year showed that AI and digital tools are no longer fringe innovations; they are becoming integral to procurement. Early adopters such as Utah, Colorado, and North Carolina demonstrated tangible benefits in efficiency and decision support, while surveys indicate strong interest from procurement leaders worldwide. Yet responsible adoption requires attention to data quality, governance, and ethics. Federal guidance like OMB M2418 provides a framework for managing risks and promoting healthy competition in the AI marketplace.

For procurement professionals, the coming year will be about moving from pilots to production. Success will depend on clear use cases, scalable architectures, and cross-functional collaboration. Agencies should continue sharing lessons through forums like NIGP's NSite community, and participate in training that builds AI literacy. By balancing innovation with caution, public procurement can harness AI's promise while preserving the integrity and transparency that citizens expect.

**AI Use in Procurement Operations**




*Source: 2025 Public Procurement Benchmark Report*

## DIGITAL TRANSFORMATION CONTINUED TO REDEFINE OPERATIONS AND STRATEGY.

- **United States:** 95% of states now operate enterprise e-procurement or ERP systems (NASPO, 2022).
- **Canada:** Public Services and Procurement Canada (PSPC) expanded CanadaBuys, and several provinces launched AI-enabled analytics for spend and supplier risk management.

Blockchain pilots, predictive analytics, and digital dashboards demonstrated that modernization succeeds only when guided by skilled, adaptive people.



## CASE SNAPSHOT

**State and Local Success Story**

NC DOA
Department of Administration

**North Carolina – automated procurement and responsible AI framework:** North Carolina's chief IT procurement officer implemented a ten-step procurement process with automation that cut the timeline from 360 days to 120 days. Automated forms pre-fill information, ensure correct templates, and reduce errors. Officials use AI for research and to generate initial RFP language, but keep humans in the loop; they emphasize that AI must not make final selections and that prompt engineering skills are becoming important. The state is also developing a Responsible Use of AI Framework aligned with privacy laws and national standards to ensure innovation does not compromise fairness.



# What the Data Says:
## Research Highlights

### PUBLIC PROCUREMENT BENCHMARK REPORT, 2025 EDITION

The 2025 Public Procurement Benchmark Report underscores an urgent need for public procurement entities to accelerate modernization by embedding digital tools, formalizing supplier management and diversity, fostering continuous policy and procedure improvement, as well as training and professional development. These actions are essential for public procurement to fully realize its strategic role in driving value, transparency, resilience, and social impact in public service delivery.

***Key Takeaways***

**Organizational & Structural Trends**

- Procurement remains siloed from executive leadership in many organizations.
- Centralization is the dominant model, though hybrid models are prevalent in large and diverse entities.

**Operational Gaps and Opportunities**

- Spend management, performance auditing, and supplier management systems are underutilized, representing key improvement areas.
- Supplier diversity programs are present but need stronger integration and enforcement.

### Technology and Innovation

- AI and advanced analytics are in early stages, posing opportunities for modernization.
- There is room for expansion of tech tools in contract management, performance tracking, and supplier engagement.

### Sustainability and ESG

- There is low maturity in embedding Environmental, Social, and Governance (ESG) and green procurement into sourcing decisions, indicating a disconnect between policy intentions and operational execution.

### Policy and Training Enhancements

- Policy frameworks are widely present but not always updated or enforced, suggesting the need for routine policy reviews.
- Procurement training programs are offered, but gaps exist in specialized areas like contract administration and supplier performance management.
- The overall trend reflects that certifications are widely valued as an enhancement of professional competency, but formal requirements decrease with job level.

## PROFESSIONAL SURVEYS & BENCHMARKING

**82%**

**of U.S. professionals reported greater strategic influence**

(CARE Practitioner Survey, 2025).

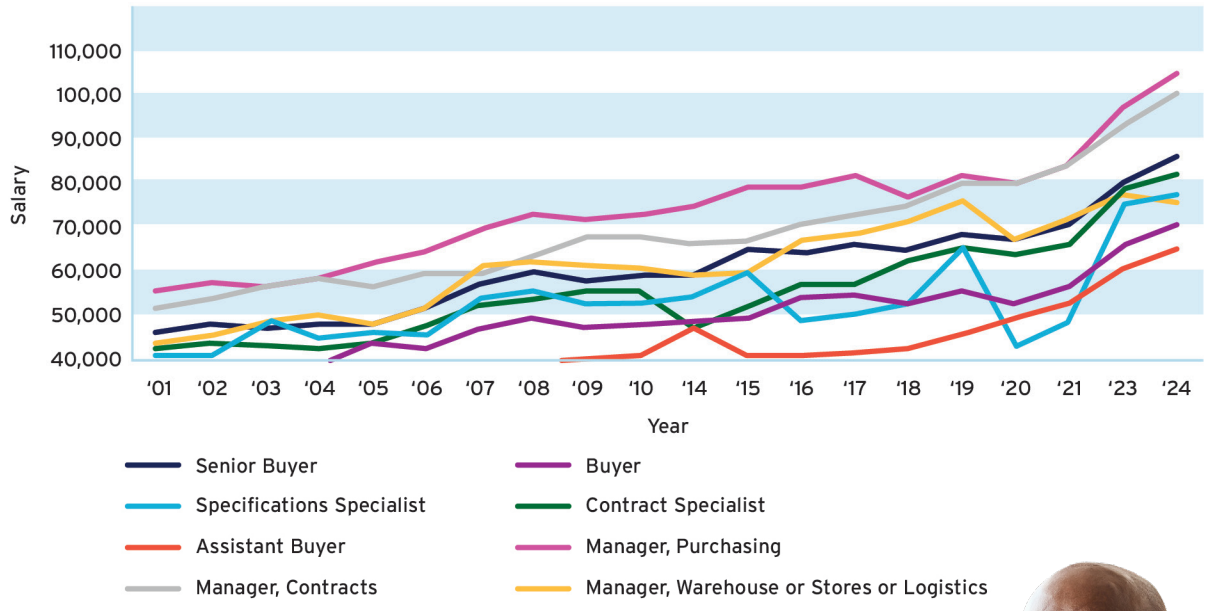


## 2025 PUBLIC PROCUREMENT COMPENSATION AND RETENTION REPORT

### Salary Trends: A Two-Decade Trajectory of Growth

The overall average salary across all positions in 2024 was $93,312, an increase from $87,055 in 2023. This year-over-year growth highlights the continued momentum of salary adjustments even within a relatively short time frame. Such growth not only reflects market dynamics but also signals organizational commitments to attracting and retaining skilled professionals in a competitive labor market.

**Salary Trend for Professional Ranks**




## PROFESSIONAL SURVEYS & BENCHMARKING

**2-4%**

**Higher compensation for credentialed practitioners**

(NIGP Compensation Study, 2024).






### Certification: Building Professional Identity and Standards

One of the defining features of the public procurement profession is the emphasis placed on certifications, which serve as markers of professional identity, expertise, and commitment to ethical practice. The 2025 survey reveals that 58% of all respondents hold a procurement-specific certification. This majority presence of certified professionals underscores the centrality of continuing education and credentialing in the field.

The consistent rise of certification over time signals an ongoing professionalization of the field. Certifications not only validate technical expertise but also communicate a shared set of values and standards across the profession. They serve as a unifying thread across diverse government entities, enabling procurement professionals to benchmark themselves against national standards while also strengthening mobility within the profession.

The findings suggest that organizations are increasingly valuing certification in recruitment and promotion decisions, further incentivizing individuals to pursue credentials as part of their career trajectory.

### Racial and Ethnic Demographics: Gradual Shifts in Representation

The racial and ethnic composition of the procurement profession reflects broader societal patterns while also revealing gradual shifts toward increased diversity. In the 2025 survey, respondents identified as 76% White, 19% Black, and 14% Hispanic. Compared to prior surveys, these figures represent slight increases in minority representation, suggesting a slow but positive trend toward greater inclusivity.

While these increases are encouraging, the data also highlight the continued predominance of white professionals within procurement. To build a workforce that mirrors the diversity of the communities it serves, further efforts may be needed in outreach, recruitment, and career advancement pathways for underrepresented groups.

### Benefits and Workplace Flexibility: Supporting Retention and Engagement

The survey results make clear that compensation is only one dimension of workforce satisfaction; benefits and flexibility are equally critical in shaping retention and engagement. Nearly all respondents—over 99%—report receiving employer-sponsored retirement and health benefits. These benefits serve as foundational supports that distinguish public sector employment from many private sector alternatives.

In addition to retirement and health benefits, 91% of respondents report access to disability insurance, and 93% have flexible work options. Flexibility, in particular, has become an essential component of workplace satisfaction in the post-pandemic era, enabling employees to balance professional and personal responsibilities more effectively.

Childcare support, reported by more than 25% of respondents, represents another important dimension of employee benefits. While not universally available, this support can significantly influence the ability of employees—particularly women and caregivers—to remain engaged and committed to their roles.

The breadth of these benefits highlights the competitive advantage that public sector organizations hold in attracting and retaining talent. At the same time, the variations in access to certain supports, such as childcare, suggest areas where organizations may expand offerings to further strengthen workforce stability.

### Retention and Turnover: Signs of Stability and Growth

Retention remains a central concern in public procurement, where workforce continuity directly influences organizational capacity and institutional knowledge. Encouragingly, the 2025 survey reveals positive trends in retention intent across roles.

Intent to stay in one's current role over the next 12 months has risen across the profession. Among Directors, 74% expressed intent to remain, up from 67% in 2022 (Report, p. 42). Managers reported 73% intent to stay, compared to 68% previously, while Professionals showed the most dramatic improvement, with 72% expressing intent to stay. This latter increase is particularly important, as professionals at the Buyer and Specialist levels often represent the pipeline for future leadership roles.

**PROFESSIONAL SURVEYS & BENCHMARKING**

**76%**
**of Canadian respondents cited workforce capacity as their top concern**

(CPPC Pulse Survey, 2024).



## SPEND & CATEGORY TRENDS

- **U.S.:** $765 billion (USD) in FY 2023 contracts (GovConWire, 2024).
- **Canada:** $32 billion (CAD) in FY 2023-24 federal awards, 14% to SMEs (PSPC Report, 2024).

Investment priorities converged on digital infrastructure, sustainability, healthcare, and clean energy.

**Trend Watch:**

Trends are showing a shift from decentralized, to more centralization procurement methods (Alkadry, 2025; NASPO, 2025; Sehgal & Kaczmarek, 2025).

- Federal category management (OMB/GSA) has saved over $111 B since 2014 by consolidating spend across 10 major categories (Sehgal & Kaczmarek, 2025).
- 74% of public entities (Alkadry, 2025) and 83% of states (NASPO, 2025) report centralized or hybrid structures, using data dashboards to monitor "spend under management."

As AI becomes more mainstream in society, it also does in government procurement with AI assisted tools and programs (Alkadry, 2025; Government Finance Officers Association, 2025; NASPO, 2025).

- 88% of states use eProcurement; 15–21% already deploy AI tools for bid drafting, fraud detection, or analytics (NASPO 2025).
- Over 90% of local entities now automate requisitions and purchase orders, expanding to supplier registration and cooperative marketplaces (Alkadry, 2025).

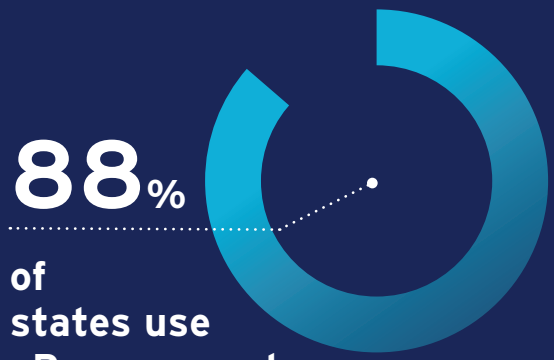
**Federal category management (OMB/GSA) has saved over**

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**88%**

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**already deploy AI tools for bid drafting, fraud detection, or analytics**

(NASPO 2025).

Seeing more prioritizing of sustainability and equity when it comes to government buying (Alkadry, 2025; GFOA, 2025; NASPO, 2025)

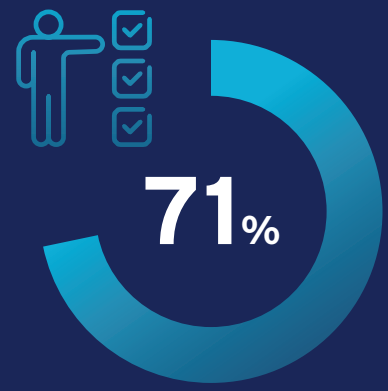
- 71% of states have sustainable-purchasing programs; 66% have supplier-diversity initiatives (NASPO 2025).
- The Justice40 Initiative directs 40% of federal investments to disadvantaged communities (GFOA 2025).
- NIGP-CARE 2025 reports growing use of ESG and living-wage criteria in awards (Alkadry, 2025).

Seeing a shift from traditional goods being the primary things the government buys to more resilient, technology, and climate-focused infrastructure, with an added focus on getting these things domestically sourced (GFOA 2025; Kane et al., 2025)

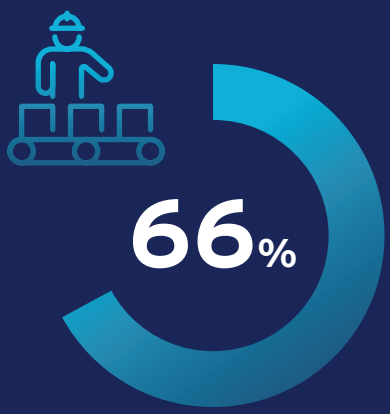
- The IIJA's $1.2 T authorization marks a generational surge in infrastructure, broadband, clean energy, and water categories (GFOA 2025; Kane et al., 2025).
- The Buy America / Build America Act now mandates U.S. made iron, steel, and manufactured products (GFOA 2025).

Because of the current fiscal uncertainty, nonprofits that work with the government are seeing a shift from stable, multiyear service contracts to shorter, performance monitored partnerships (Urban Institute 2024 & 2025).

- Roughly 68% of nonprofits deliver government-funded services (Martin et al., 2024), confirming the "contracting state."
- By 2025, one-third of nonprofits experienced funding freezes or cancellations, forcing agencies to shorten contract horizons and reassess risk (Tomasko et al., 2025).




**of states have sustainable-purchasing programs;**




**have supplier-diversity initiatives**

(NASPO 2025).

## DEFINING THEMES & TRENDS FOR CANADIAN PUBLIC PROCUREMENT OFFICIALS IN 2025

Public procurement officials at all levels in Canada (federal, provincial, territorial, and municipal) are navigating a dynamic environment defined by a significant push for modernization, an increased focus on achieving socio-economic objectives, and a constant need for compliance within complex trade rules. These major themes frame the key priorities and demands placed upon procurement professionals across Canada in 2025.

### The Strong Shift to "Buy Canada" and Domestic Sourcing

The most significant policy trend impacting officials in 2025 is the intensified focus across all levels of government on prioritizing local, regional, and Canadian suppliers, goods, and services. This push is often driven by a mandate to support regional economic recovery and enhance self-sufficiency. Consequently, procurement officials must actively design solicitations to boost domestic production and support small and medium-sized enterprises (SMEs) within their respective jurisdictions. This requires a careful re-evaluation of sourcing strategies and a deep understanding of how to apply local preference policies effectively. Public entities are increasingly using procurement as a lever to strengthen regional supply chains, particularly in critical sectors like infrastructure, housing, and technology.

This shift means officials must move beyond simply securing the lowest price to achieving better value for the community and economy. The primary challenge remains ensuring that domestic preference policies operate alongside Canada's major trade agreements: the Canadian Free Trade Agreement (CFTA), which governs trade among provinces and territories, and the Comprehensive Economic and Trade Agreement (CETA), which covers international trade. Both agreements mandate open, non-discriminatory access to covered procurements, forcing officials to continually balance local policy goals with mandatory domestic and international trade law.

### Using Procurement to Achieve Socio-Economic Goals

Procurement is increasingly viewed as a powerful tool to achieve broader public policy objectives, placing new and significant responsibilities on purchasing officials. A sustained, measurable focus exists on increasing the participation of Indigenous businesses and other underrepresented supplier groups—including women, visible minorities, and persons with disabilities—in government contracting to ensure equitable economic opportunities. The enduring trend toward sustainable procurement also means officials must integrate environmental and social criteria (like lifecycle costs, energy efficiency, and waste reduction) into their Requests for Proposals (RFPs) for goods, services, and construction projects, ensuring purchasing decisions align with long-term community values.

## THROUGH THE ACADEMIC LENS

Over the past five years, public procurement research has expanded beyond cost savings and regulatory compliance to explore how government purchasing can sustain operations during crises and use data more strategically. This shift reflects a broader recognition that procurement is not simply an administrative process but a strategic function that supports public resilience and innovation.

Two themes stand out across recent academic and practitioner work, both particularly relevant to U.S. public agencies. The first is the growing focus on resilience—how procurement systems anticipate and respond to crises, geopolitical disruptions, and policy uncertainty. The second is the rapid integration of digital tools, especially artificial intelligence (AI), to enhance decision quality, transparency, and performance monitoring. These two developments are closely linked: the same data systems and governance structures that enable the effective use of AI also underpin more resilient sourcing, coordination, and crisis response.

### Resilience in Public Procurement

The COVID-19 pandemic revealed how quickly global shortages can overwhelm public buyers and disrupt essential services. Research highlights several interconnected weaknesses that limited how procurement agencies could respond—fragmented governance, outdated information systems, rigid regulations, and supplier networks that proved far too fragile (Harland et al., 2021). Addressing these issues separately provided only temporary relief. True resilience requires linking policy, data, and supplier management so that systems can adjust rather than collapse under pressure. Lessons from 2020 and 2021 support this direction. State-level strategies recommend embedding risk management into long-term framework agreements, clarifying legal authority for rapid contracting, and investing in logistics and IT systems that remain functional under stress (Handfield et al., 2021).

Studies also emphasize the value of collaboration. During the pandemic, procurement teams at the state, local, and hospital levels that shared market intelligence and coordinated sourcing decisions secured critical goods more consistently than those acting alone (Peters et al., 2023). This cooperative model—built on trust, information exchange, and pooled demand—was often as effective as any emergency contract. It demonstrated that resilience is not only a matter of rules or resources but also of relationships and coordination across public agencies.

### Digital Transformation and Public Procurement

Digital tools are reshaping how governments plan, execute, and monitor procurement. Over the past few years, agencies have invested in data platforms, automation, and advanced analytics to make public purchasing more efficient and transparent. Among these innovations, AI has become the focal point. While digitalization began with electronic tendering and basic spend analysis, AI now drives a new phase—one centered on prediction, pattern recognition, and real-time decision support (OECD, 2025a).

Across the procurement lifecycle, AI applications are expanding quickly (Andersson et al., 2025; OECD, 2025b). Governments are using machine learning to analyze spending patterns and detect anomalies, natural language processing to scan markets and identify potential suppliers, and chatbots to assist buyers and vendors during the bidding process. More advanced systems are being tested to forecast demand, evaluate supplier risk, and flag signs of collusion or fraud before they affect outcomes. These tools promise to shorten procurement cycles, improve compliance, and strengthen oversight.

Despite its potential, adoption remains uneven, reflecting variations in governance capacity, resources, and leadership commitment. Early adopters typically have clear AI policies, strong

coordination between procurement and IT offices, and leaders who view AI as a strategic investment rather than a limited experiment. By contrast, lagging states often face fragmented governance, insufficient technical capacity, and risk-averse leadership, which keep AI confined to isolated pilots rather than embedded practice (Patrucco and Dimand, 2025). Few agencies have extended AI use to post-award contract management or supplier performance monitoring—areas where inefficiencies and risks remain high. This imbalance indicates that most governments are still experimenting rather than institutionalizing AI, and broader integration will require better data quality, stronger system interoperability, and common standards to enable seamless information exchange.

Experience from digital transformation initiatives shows that technology alone does not guarantee better outcomes (Dimand et al., 2024). AI systems rely on accessible and accurate data, clear governance, and staff who can interpret algorithmic results with a critical eye. Agencies that have invested in data management, training, and clear rules for algorithmic accountability are reporting faster processing, stronger audit trails, and better visibility into supplier markets. Others, without these foundations, have seen digital projects stall or generate new risks, from biased outputs to reduced transparency (Microsoft, 2024).

The growing use of AI in sustainability-oriented procurement illustrates both its strengths and limitations. Algorithms can help translate environmental and social goals into actionable criteria, drawing from vast datasets on suppliers, certifications, and life-cycle impacts (Andhov et al., 2025). Yet these tools are only as trustworthy as the data and oversight behind them. Without strong governance and transparency, automation can easily replicate existing inequities or weaken accountability.

### Looking Ahead: Evolution of Public Procurement and Competencies for the Future

Public procurement is no longer just a rule-bound process for buying goods and services. It has become a strategic public function that must manage uncertainty, sustain operations during crises, and deliver long-term public value. The pandemic revealed this shift clearly: procurement officials were not only enforcing procedures but coordinating networks, securing supplies, and stabilizing critical operations. This experience reinforced the idea of ***public procurement for crisis readiness***, i.e., the notion that readiness must be a permanent part of procurement practice rather than a temporary reaction. Building this capacity requires flexible contracting, diversified supplier portfolios, and digital systems that allow agencies to share information and act quickly when disruptions arise (OECD, 2024).

At the same time, digital transformation has changed the profession's center of gravity. Data platforms, analytics, and artificial intelligence are becoming embedded in day-to-day decisions, from planning purchases to monitoring supplier performance. Yet technology on its own is not the differentiator. What matters is how people use it: how procurement teams interpret data, question algorithmic recommendations, and combine automation with professional judgment. The future of procurement will depend less on the sophistication of tools and more on the ability of professionals to use them intelligently, ethically, and strategically.

To operate effectively in this new environment, three areas of competence are emerging as essential. ***Digital and analytical skills*** are now basic requirements, enabling professionals to turn data into insight and to verify (and not simply accept) automated analyses. ***Resilience and risk management*** must become everyday disciplines, helping procurement teams anticipate supply shocks, evaluate exposure, and coordinate responses across agencies. Finally, a ***strategic and innovative mindset*** is needed to align procurement decisions with public goals such as sustainability, equity, and local economic growth.

These developments describe a profession that is maturing quickly and a research field that is evolving alongside it. Public procurement studies are moving beyond questions of compliance and efficiency to explore how systems can balance agility, accountability, and public trust. The growing emphasis on resilience, crisis readiness, and digital intelligence reflects this shared trajectory: practice and research now inform each other in shaping procurement's next phase. Procurement is no longer peripheral to policy: it is becoming central to how governments prepare for, and adapt to, the future.

> **"When we lead with purpose, advocate boldly for the value of procurement, and support one another with intention, the future of public procurement will be strong."**
>
> *~ Debbie Trueblood, CEO, NIGP*






# Procurement Excellence:
## Successes from the Front Lines

### CTRL+ALT+PROCURE: REBOOTING PUBLIC HEALTH PURCHASING WITH PURPOSE

The Maricopa County Department of Public Health (MCDPH) Purchase Portal Project was developed to modernize and streamline the department's fragmented procurement process. With over 800 employees and a $225 million annual budget supported by more than 70 grants, the department processes approximately 3,000 purchase requests each year. Prior to the portal, procurement relied on manual forms, email approvals, and Excel tracking logs, resulting in inefficiencies, limited transparency, and high administrative burden. The goal of the project was to create a centralized, digital workflow to increase efficiency, accuracy, and accountability while improving the user experience.

**Presented at the 2025 Procurement Excellence Showcase in Denver, Colorado at NIGP Forum 2025 by:**

- Cheryl Bucalo, Purchasing & Contracts Manager and Delegated Procurement Officer, Maricopa County Public Health
- Audrey Morin, Procurement Specialist, Maricopa County Public Health

Following a delayed start due to the COVID-19 pandemic, the project was revived in late 2021. A user-centered design approach was taken to redesign workflows, gather stakeholder input, and ensure compliance with procurement policies. The new system, developed on the OnBase platform with an external contractor (Databank) and supported by the Office of Enterprise Technology, launched in July 2023. Initial implementation included 104 users and was accompanied by tailored training materials and phased rollout to ensure adoption.

Phase 2, launched in October 2024, introduced enhanced workflow logic, new notification features, and a robust reporting module allowing users to generate both standard and ad hoc reports. Key outcomes include reduced processing time, fewer P-Card errors, elimination of paper-based forms, improved audit readiness, and significantly better visibility into procurement status. In its first full fiscal year, the portal processed 3,376 Purchase Request Forms (PRFs), with an additional 2,862 already processed in the current fiscal year as of May 2025—demonstrating strong adoption and sustained utility.

The portal's implementation directly aligned with public procurement values, including transparency, accountability, and service. Standardized digital workflows improved impartiality and consistency, while user dashboards and real-time tracking enhanced visibility and trust. Staff satisfaction improved, and interdepartmental communication became more streamlined. Notably, the portal also proved valuable in hybrid work settings by ensuring continuity of operations through remote accessibility.

This initiative offers a replicable model for public sector agencies facing similar procurement challenges. Lessons learned include the importance of early and continued end-user involvement, phased implementation to support adoption, and responsive design that evolves with user needs. The team continues to gather feedback and has already outlined a Phase 3 to further integrate with financial systems and expand functionality to additional procurement workflows.

In conclusion, the MCDPH Purchase Portal Project has transformed an outdated and labor-intensive process into a modern, digital solution. Its success demonstrates the power of strategic investment, collaborative implementation, and a user-centered approach to public procurement improvement. The outcomes not only support operational excellence but also position the system as a transferable model for government agencies seeking to enhance procurement efficiency and service delivery.

## PROCUREMENT AT PACE: MARYLAND'S RAPID MODERNIZATION OVERHAUL

**Presented at the 2025 Procurement Excellence Showcase in Denver, Colorado at NIGP Forum 2025 by:**

- Linda Dangerfield, Deputy Chief Procurement Officer - Operations - Maryland, DGS/Office of State Procurement/MPPA
- Kareen Davis, Senior Director, DGS/ Office of State Procurement/MPPA
- Wallace Sermons, Chief Procurement Officer – Maryland, DGS/Office of State Procurement/MPPA

In less than 12 months, Maryland executed the most sweeping procurement reform in its history, transforming a system once defined by inefficiency, rigidity, and inequity into a platform for economic inclusion and strategic governance. Procurement at Pace tells the story of how the Office of State Procurement (OSP), in partnership with the Moore-Miller Administration, led this bold overhaul from concept to codification, culminating in the Governor's Executive Order (Dec. 2024) and the passage of the Procurement Reform Act of 2025 (May 2025).

Faced with mounting challenges, frequent vendor disqualifications, delayed payments, procedural complexity, and barriers to entry for small, minority, and veteran-owned businesses, Maryland chose urgency over inertia. OSP spearheaded the reform, not merely implementing change but designing it.

The initiative redefined the role of procurement from a compliance checkpoint to a catalyst for equity, transparency, and good governance.

Methodologically, the effort centered on deep stakeholder engagement and rapid policy design. Between March and December 2024, OSP engaged over 230 stakeholders, including 86 agency teams, 136 advocacy organizations, and national thought partners, to inform a policy roadmap grounded in lived experience and operational realities. Internal data analysis identified systemic bottlenecks, guiding reforms that would both simplify procurement and expand opportunity.

Key results include:

- A 15-day payment mandate for Small Business Reserve (SBR) contracts (cut from 30 days).
- The introduction of the "Rule of Two" to prioritize small business participation.
- Allowing corrections for minor Minority Business Enterprise form errors.
- Creation of the Veteran-Owned Small Business Reserve program.
- Expanding Maryland's Small Business Reserve (SBR) program, raising the cap from $500,000 to $1 million, and eliminating the $50,000 floor.
- Streamlined Minority Business Enterprise certification renewals and increased flexibility in goal-setting.

Early implementation under the Executive Order has already improved bid responsiveness, vendor engagement, and payment timelines. Long-term changes will be institutionalized starting October 1, 2025, with the enactment of the Procurement Reform Act.

Beyond policy, the most lasting impact may be cultural. Procurement professionals are now viewed as strategic leaders and architects of public value. The reform has improved staff morale, reduced administrative burden, and positioned procurement as a trusted partner in agency decision-making.

This initiative shows that major reform doesn't require decades or massive budgets. With strong executive support, stakeholder trust, and a data-driven approach, Maryland achieved what many states only plan for, real, rapid, and replicable change.

Maryland's story offers a blueprint for others: empower procurement leaders, include them early in policymaking, and use procurement not just to buy, but to build. Procurement at Pace is not just about what was changed, but how it was changed, and why it matters for the future of public service.



# Forward Focus:
## The Year Ahead

### EMERGING PRIORITIES

- Sustainability and climate-resilient procurement.
- Ethical AI and automation governance.
- Workforce agility and leadership pipelines.
- Cross-border collaboration on data standards and supplier engagement.

**Sustainability and Green Public Procurement**

**Problems:** Anderson & Salgueiro (2025) and Mota (2024) show a global move toward sustainability-driven procurement, where spending decisions align with climate and social goals. However, they are still struggling to balance this shift with trade obligation compliance to show that sustainability can lead to good governance.

**Solutions:** Both authors suggest prioritizing cross-border collaborations that would enhance green procurement methods, utilizing research on best practices, and adopting modernized decision making policies.

### TECH WATCHLIST

**Trends and tools worth exploring.**

- Predictive AI for market and supplier risk.
- Blockchain for contract authenticity.
- Human-centered vendor portals.
- Integrated performance analytics linking spend to outcomes.

### E-Procurement/AI Systems

**Problems:** Switching to AI/e-procurement systems has the potential to improve transparency and increase efficiency, but some internal structures and legal procurement systems might be ill-suited for the AI systems (Chen, et al., 2021; Johnson et al, 2025; NASPO, 2025). For instance, decentralized systems face greater struggles with standardized adoption of AI (Chen et al., 2021; NASPO, 2025), and the current systems are outdated as they are better equipped for purchasing physical goods rather than complex digital technologies (Johnson et al., 2025). The lack of complete understanding of the AI systems governments are using has also led to a power imbalance with vendors and weak oversight that could lead to unethical purchasing (Johnson, et al., 2025).

**Solutions:** Chen et al. (2021) and NASPO (2025) suggest centralizing systems might help enable technological modernization. When centralization isn't possible, creating strong collaborative networks could create a bridge for expertise and accountability (Chen et al., 2021; Johnson et al., 2025). Creating AI review boards and modernizing procurement laws to reflect the growing reliance on AI could also help solve some of the ethical misuse issues that occur.

## SKILLS TO BUILD

**Practical guidance on certifications, micro-learning, and leadership tracks.**

- Data literacy and analytical storytelling.
- Emotional intelligence and communication.
- ESG procurement expertise.
- Cross-functional collaboration and change management.

### Mismanagement and Ethical Issues

**Problems:** Tillipman (2025) identified issues with outdated regulatory frameworks, inconsistent application across agencies, and conflict of interests systems that could lead to national security issues, while Kistler et al., (2024) found that there has been repeated contractor misconduct that has been left unpunished.

**Solutions:** They suggest a shift toward adaptive procurement governance by embedding organizational learning systems, modernizing FAR ethics provisions, expanding training, and strengthening oversight to deter repeat violations (Kistler et al., 2024; Tillipman (2025).






# Conclusion, Call to Action:

## Invest in the Profession

The 2025 procurement environment reflects both progress and polarization. Agencies advanced in digital transformation and supply-chain security, yet the rollback of DEI initiatives redefined the relationship between procurement and public policy. What began as an effort to enhance inclusivity has become a debate over legality, ideology, and the role of government in shaping economic opportunity.

For procurement leaders, the imperative is clear: remain compliant, data-driven, and adaptive. As legislative and regulatory boundaries shift, professionals must safeguard the foundational principles of fairness, transparency, and competition while navigating an increasingly divided policy terrain. Whether framed as equity, access, or neutrality, the public mission remains the same—ensuring that every dollar spent serves the public interest with integrity.

Procurement's future will be written by professionals who connect knowledge with purpose and lead with integrity. CARE and NIGP invite governments, universities, and industry to join this movement, to research, educate, and inspire the leaders who will define the next era of public service.

> **"We must build the future we want our communities to inherit—one contract, one student, one idea at a time."**
>
> *~ Debbie Trueblood, CEO, NIGP (CARE Launch Address, 2025)*

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