



Procurement Orchestration – Market Overview and Provider Landscape

April 2025

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- ▶ Pricing Analytics as a Service
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Introduction and overview

Research methodology

Background of the research

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01 Robust definitions and frameworks

Function-specific pyramid, Total Value Equation (TVE), PEAK Matrix®, and market maturity

02 Primary sources of information

Annual contractual and operational RFIs, provider briefings and buyer interviews, web-based surveys

03 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests

04 Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and providers

Proprietary contractual database on procurement orchestration capabilities of 6 technology providers

Large repository of existing research in procurement

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, providers, technology providers, and industry associations

Background of the research

In today's rapidly evolving business landscape, procurement executives face numerous challenges, including macroeconomic uncertainty, scarcity of resources, and an expanding scope of responsibilities. It does not help that most procurement organizations struggle with highly inefficient procurement operations as well. All these factors have led to an increased interest in AI-enabled procurement orchestration solutions.

Upon being embedded across the disparate systems used by an organization for its procurement activities, procurement orchestration solutions help provide visibility into the entire organizational spend while enabling data-driven decision-making and improving stakeholder collaboration. This research covers the technology landscape of procurement orchestration solutions to enable informed decision-making regarding the adoption of tools/technologies in this space.

In this report, we focus on:

- Adoption drivers for procurement orchestration tools
- Procurement orchestration overview and technology provider landscape
- Capability assessment of technology providers
- Provider profiles

Scope of this report

Geography: global

Providers: all

Process/Function scope: procurement orchestration

Technology providers: six leading procurement orchestration technology providers

Procurement orchestration tools

Procurement overview

Key evolving trends and imperatives shaping the industry

Key business challenges in procurement

Procurement orchestration tools as a solution to address business challenges

Core components of procurement orchestration solutions

Important considerations when selecting procurement orchestration solutions

Procurement overview

Overview

Procurement team’s role entails handling the end-to-end process of sourcing goods and/or services by analyzing and classifying spend, creating category strategies, contracting, managing supplier risks and relationships, seeing through the purchases among other activities to help meet their organization's needs, while ensuring cost-efficiency and compliance adherence



Spend management



- Spend analysis
- Spend forecasting
- Opportunity assessment
- Supply base risk analytics



Category management and sourcing



- Market intelligence gathering and analysis
- Category strategy creation and execution
- Supplier identification
- Sourcing event preparation
- Supplier evaluation
- Negotiation and supplier selection



Contract management



- Contract creation and authoring
- Contract administration
- Contract compliance management
- Contract optimization



Supplier management



- Supplier information management
- Supplier performance management
- Supplier relationship management
- Supplier risk management
- Facilitate supplier innovation



Purchase to pay



- Intake management
- Requisition and PO processing
- Receiving/receipt processing
- Accounts payable

Key evolving trends and imperatives shaping the industry



Reducing costs remains a top priority

Cost reduction remains a top priority for procurement leaders in 2025, driven by escalating inflationary pressures, fluctuating tariff structures, and macroeconomic uncertainty stemming from geopolitical factors.



Prioritizing supplier management

To ensure seamless supply continuity amid global supply chain disruptions, procurement teams are strengthening supplier management capabilities by enhancing performance monitoring, proactively mitigating risks, and fostering strategic relationships.



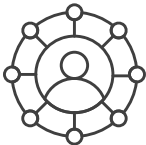
Facilitating sustainability initiatives

Procurement teams have been tasked to act as a strategic enabler in achieving organization-wide sustainability objectives and advancing Diversity, Equity, And Inclusion (DEI) goals by spearheading supplier diversity initiatives and playing a vital role in reducing scope 3 carbon emissions.



Rise of AI-driven procurement

To stay aligned with organization-wide digital transformation efforts and improve productivity, procurement leaders are embracing AI and generative AI, while prioritizing confidentiality, data privacy, and security



Bridging talent gap

While digital transformation is essential, it is talent that ensures its true value realization. AI-enabled digital tools require specialized skills from procurement professionals, making investment in bridging the talent gap crucial for procurement teams.



Fostering cross-functional collaboration

Cross-functional collaboration is crucial for aligning procurement with the broader organizational objectives. However, process and data silos often hinder this alignment, making stakeholder engagement a priority to strengthen procurement effectiveness.

Key challenges in procurement

These challenges have led to increased costs, unmanaged risks, and missed opportunities for strategic value creation



Inefficient procurement operations



Unsatisfactory procurement policy compliance



Misalignment with business priorities



Inadequate supplier management

Details

- Limited visibility into the procurement activities and spend data across the organization due to disparate systems
- Complex and rigid procurement technology stack requiring IT intervention for minor changes
- Manual processes preventing the procurement team from focusing on high-value, strategic initiatives, limiting their impact on business outcomes

- Low adherence to procurement policies and procedures due to complex and time-consuming processes
- The majority of business stakeholders prefer to directly engage with the suppliers
- Legacy procurement tools have a steep learning curve, which is a deterrent for their adoption among business stakeholders

- Procurement often operates in silos from business functions, leading to misaligned goals and objectives
- Scarcity of resources at procurement's disposal makes it difficult to serve function-specific requirements
- Business stakeholders engage procurement late in the sourcing process, often only for negotiations, limiting value contribution

- Macroeconomic uncertainty is driving cost pressures on procurement, conflicting with the goal of building long-term relationships with the suppliers
- Procurement teams must deliver more with fewer resources, resulting in overstretched teams and operational inefficiencies
- Limited procurement bandwidth makes it difficult to continuously monitor supplier risks

Impact on business outcomes

- Increased cycle time for procurement processes
- Reactive cost management and risk mitigation
- Inability to take real-time data-driven decisions

- Increased maverick spending
- Loss of volume-based discounts
- Reduced spend visibility and control

- Unrealized cost-saving opportunities
- Increased risk and compliance issues
- Reduced procurement strategic impact

- Hindering mutual value creation with suppliers
- No focus on supplier-driven innovation
- Exposure to supply continuity disruptions

Procurement orchestration as a solution to address procurement's challenges

Procurement orchestration solutions enable procurement teams to streamline end-to-end workflows, enhance collaboration, and ensure data-driven decision-making through AI, automation, and seamless system integration

Defining procurement orchestration solutions

Procurement orchestration solutions are advanced technologies that streamline and automate procurement workflows, enabling seamless coordination across sourcing, category management, supplier management, and other procurement activities. Leveraging AI, ML, NLP, and workflow automation, these tools optimize procurement operations, in turn ensuring data-driven decision-making, procurement policy adherence, and enhanced collaboration between buyers, suppliers, and procurement stakeholders. By integrating with procurement and cross-function systems, they provide real-time visibility, process standardization, and proactive risk mitigation.

Impact of the solutions on

Inefficient procurement operations

- Integrate disparate systems, centralizing procurement activities and spend data into a single platform
- No-code/Low-code feature allowing ease of configurability and providing improved agility
- Streamline repetitive and tactical tasks with AI and workflow automation

Misalignment with business priorities

- Provide a centralized platform for seamless communication, aligning procurement goals with business objectives and fostering early stakeholder engagement
- Dynamic workflows to help procurement teams efficiently serve diverse functional requirements

Unsatisfactory procurement policy compliance

- Simplify procurement processes for business users by offering an intuitive, user-friendly interface, with guided buying experience
- Integrate policy enforcement within procurement workflows to ensure adherence to guidelines, while reducing manual interventions and approval bottlenecks

Inadequate supplier management

- AI-driven analytics and real-time monitoring to identify and mitigate supplier risks
- Provide platform to manage supplier relationships, ensuring better engagement
- Improve visibility across supplier base, thus enabling strategic supplier initiatives

Core components of procurement orchestration solutions



No-code/Low-code workflows

- Customizable workflow templates based on spend categories and spend thresholds
- Intuitive drag-and-drop interface
- Guided workflow creation
- No coding expertise required



AI chatbots

- Conversational AI for procurement support
- Multi-modal interactions (text, voice, etc.)
- AI-enabled guided buying
- Smart recommendations



Generative AI capabilities

- Multi-modal Large Language Models (LLMs), pre-trained on procurement data to create an intelligent user experience
- AI copilots to assist procurement in drafting documents, conducting market research, and analyzing data



Compliance checks

- Workflows' adherence to industry regulations and internal policies
- Risk review, privacy review, information security review, and approval review, incorporated with automatic routing



Orchestration library

- Pre-built customizable workflow templates
- Pre-configured connectors
- APIs and webhooks for integration
- Built-in audit trails for tracking changes

Important considerations when selecting procurement orchestration tools

Key considerations for procurement orchestration tools



Process automation and workflow management

- No-code/Low-code workflow builder
- Ability to customize workflows based on spend and category
- AI assistant for guided buying
- Automated self-service requests
- Automated status updates



Data integration and management

- Ability to integrate different forms of data present across disparate systems and business functions
- Automated data extraction from the entire database
- Consolidate and standardize purchase, contract, and supplier data



Stakeholder collaboration

- Enable document sharing
- Ability to connect with existing internal and external stakeholders using communication channels such as Slack and Microsoft Teams
- Provide real-time collaboration



Dashboarding and reporting

- Configurability, customizability, and depth of visualizations
- Ability to generate stakeholder-specific reports
- Bottleneck identification using real-time analytics
- Real-time recommendations on efficiency improvement



Integrability

- Pre-defined template library
- Ease of implementation
- Time taken to go live
- Ability to integrate with APIs and pre-built connectors
- Ease of updating new features

Security and data privacy

Compliance

Intuitive UI/UX

Provider profile

ORO | overview

Product overview

ORO is a procurement orchestration platform designed to deliver a seamless and agile experience for business users and procurement teams. By bridging gaps between disparate systems and teams, ORO acts as a single pane of glass for all procurement data, ensuring transparency and visibility throughout the procurement life cycle.

Built with a deep understanding of procurement semantics, ORO orchestrates end-to-end procurement workflows across heterogeneous teams, systems, and processes. Its integration of generative AI and NLP further enhances the user experience with intuitive, human-centric interactions.

With a strong focus on compliance, ORO adapts effortlessly to evolving regulatory requirements, allowing organizations to remain agile and resilient in the face of changing regulations and business needs.

Headquarters: Palo Alto, California

Website: www.orolabs.ai

Product launch date: 2022

Key leaders

- Sudhir Bhojwani, CEO, Co-founder
- Yuan Tung, CTO, Co-founder
- Lalitha Rajagopalan, Operations/Strategy, Co-founder

Key clients

- Novartis
- Liberty Global
- Booking.com
- BASF

Industries served

● Present ● Not present



BFSI



CPG and retail



Healthcare and life sciences



Hi-tech and telecom



Energy and utilities



Manufacturing



Travel and logistics

Geographic mix

● Present ● Not present

- | | | |
|-----------------|--------|--------------------------|
| ● North America | ● UK | ● Latin America |
| ● Europe | ● APAC | ● Middle East and Africa |

Pricing models

● Present ● Not present

- | | | |
|--|--|--|
| ● Subscription licensing | ● Per developer- / user-based | ● Per transaction- / process-based |
| ● Outcome-based (for example, basis the savings generated) | ● Fixed-fee enterprise-wide license with unlimited usage | ● Usage-based (for example, per hour of license usage) |

Note: The industry and geographic mix specifies the provider's current client mix and does not directly relate to its capability to serve or not serve across these industries and geographies

ORO | capability dimensions

Scope of the report: [key considerations for procurement orchestration tools](#)



Process automation and workflow management



Data integration and management



Stakeholder collaboration



Dashboards and reporting



Integrability



Everest Group comments

- ORO's drag-and-drop workflow configuration enables seamless creation of conditional workflows. Backed by procurement semantics, these workflows dynamically adapt to various scenarios such as considering a supplier's past performance or if the supplier is new and presents higher risk
- Its ability to orchestrate parallel processes significantly reduces operational delays
- The NLP-enabled AI assistant offers a guided buying experience
- ORO's embedded iPaaS ensures smooth data exchange between disparate systems including ERPs, sourcing tools, project management tools, and contract management platforms
- The platform acts as a single pane of glass for supplier data, streamlining information across systems. It streamlines updates by allowing business users to request and automate changes in third-party systems, reducing reliance on other teams
- ORO supports integration with collaboration platforms such as Slack and Microsoft Teams, enabling real-time communication and document sharing among procurement stakeholders, business users, and suppliers
- The solution offers automated status updates and real-time visibility into workflows, enhancing process efficiency for both buyers and suppliers, while allowing stakeholders to engage with processes using familiar tools
- ORO offers highly customizable dashboards that allow users to filter and analyze data by request type, category, or department. It also provides actionable insights such as identifying aging requests and bottlenecks, allowing users to improve process efficiency
- Stakeholder-specific reports and real-time analytics (for example, automated risk checks, and commodity classification) ensure transparency and informed decision-making
- ORO allows procurement teams to quickly adapt to changing regulatory requirements, managing complex integrations to keep businesses remain agile and responsive
- The platform offers robust API integrations, while also enabling in-depth integrations in the absence of APIs with legacy tools through procurement semantics
- It also gives organizations the flexibility to use their own LLMs ensuring seamless integration with future systems

ORO | case study and future roadmap



Problem

A global leader in healthcare and pharmaceuticals

The organization encountered significant challenges in its procurement and supplier onboarding processes, which resulted in:

- Disconnected systems and modules lacking end-to-end integration, leading to supplier onboarding time extending up to three months and causing operational delays
- Vulnerabilities in the process including risks of bank account fraud
- A poor experience for business users, diverting their attention away from core innovations such as medicine development



Solution

To address these challenges, ORO collaborated with this organization to implement a comprehensive solution, which included:

- An advanced orchestration layer to streamline procurement and supplier life cycle management by consolidating processes across systems
- A co-developed bank account fraud detection tool with trusted third-party platforms to mitigate risks, making use of ORO's risk orchestration capabilities
- An intuitive UI to guide users through streamlined supplier onboarding workflows



Results

- Leveraging the fraud detection tool, the organization successfully blocked over 1,000 fraud attempts in 2.5 years, preventing potential financial losses of US\$10-15 million
- Supplier onboarding times were reduced from a median of 21 days to 5 days with the help of the orchestration layer, significantly improving operational efficiency and allowing procurement professionals to focus on strategic aspects
- User satisfaction also increased markedly, with the onboarding experience likened to consumer-grade platforms such as ChatGPT

Future roadmap

- ORO plans to significantly expand its generative AI capabilities to eliminate redundant manual tasks, enabling fully automated compliance processes
- To ensure adaptability to evolving business landscapes, ORO will also provide customers with enhanced flexibility to integrate their own AI frameworks such as the **bring your own LLM** approach

Appendix

Glossary

Glossary of key terms used in this report

Application Programming Interface (API)	An API is a set of protocols and tools that allow different software systems to communicate and interact with each other, enabling seamless data exchange and functionality integration	Source-to-Pay (S2P)	An S2P process is an integrated end-to-end process that includes spend data management, strategic sourcing, vendor management, demand management, day-to-day purchasing, performance management, AP, and T&E processing
Buyer	The company/entity that purchases tools/solutions/software from a technology provider	Stakeholder visibility	It refers to the tool's ability to provide information regarding stakeholders and their roles and responsibilities across both enterprises and suppliers, enabling transparent governance structure along with fostering streamlined supplier collaboration and communication
Generative AI	A relatively new form of AI in which the underlying machine learning models are trained on huge datasets using unsupervised and semi-supervised learning. The models can generate new content in the form of text, images, videos, audios, code snippets, and more	Technology provider	A company/entity that provides digital tools/solutions/software to another company/entity
Large Language Models (LLMs)	Advanced AI systems that are trained in large datasets, which excels in comprehending and generating human-like data	User-based access	The ability to grant or restrict access to various functionalities, features, and information across the tool based on user type; for example, access given to vendor analyst vis-à-vis vendor manager or access given to supplier-end stakeholder vis-à-vis enterprise-end stakeholder
Natural Language Processing (NLP)	A cognitive intelligence-based methodology to interpret human languages	Webhook	Event-driven communication tool that automatically sends data between applications via hypertext transfer protocol
Machine learning	A type of artificial intelligence that provides computers with learning capabilities without explicit programming		
Sentiment analysis	Understanding the mood and emotions of the user by deploying NLP, text analysis, and computational logistics		
Source-to-Contract (S2C)	An S2C process is an integrated end-to-end process that includes spend data management, strategic sourcing, supplier management, and demand management		

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