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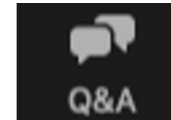
The Home of Scrum

NextGen Supply Chain in the Age of AI: Emerging Trends Shaping 2025

DATE

Quick Guidelines

- Your microphones will be muted throughout
- This session is recorded. The recording and slides will be available after the webinar within 24 hours.
- Please ask questions!
 - Submit questions by selecting the Q & A icon:



Who is Scrum.org

Mission:
*Helping People and
Teams Solve
Complex Problems*



Ken Schwaber
Scrum.org Founder,
Chairman and
Co-creator of Scrum



About Our Speakers



Mirko Kleiner

President
Lean Agile Procurement Alliance



Simon Reindl

Professional Scrum Trainer
Board Member LAP Alliance



Eric Naiburg

Chief Operating Officer
Scrum.Org



TARIFFS
JUST AHEAD

Multi-Dimensional Disruptions

Uncertainty is everywhere – the use of supply networks
is no longer optional!

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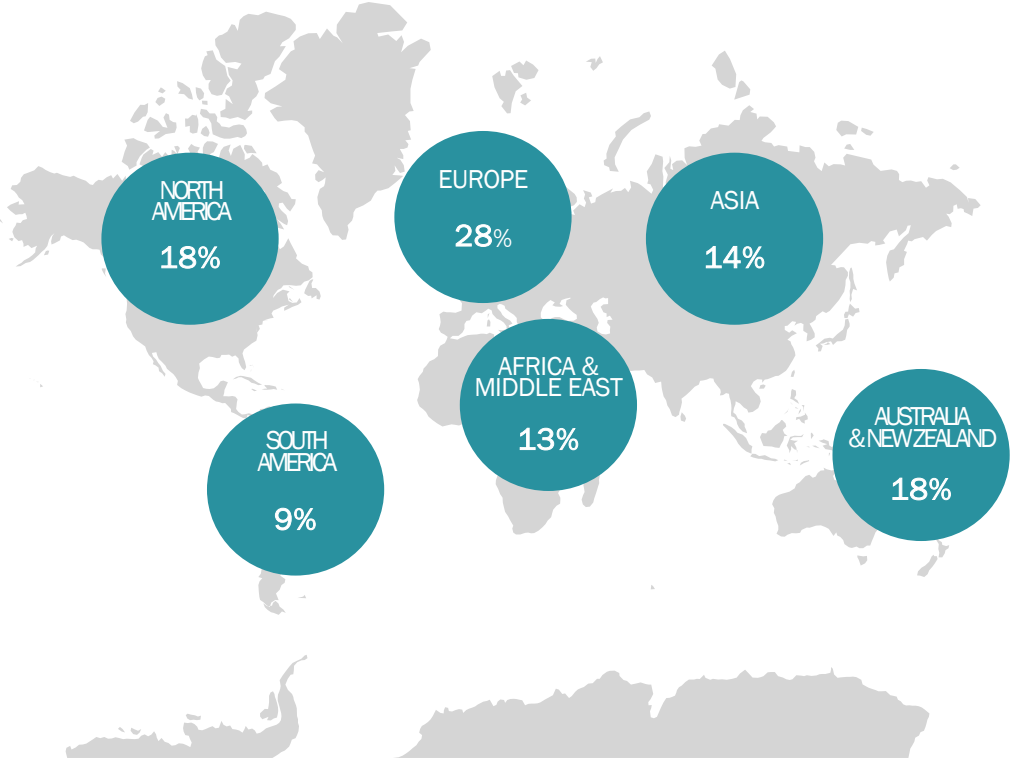
AGILE PRODUCT OPERATING MODEL



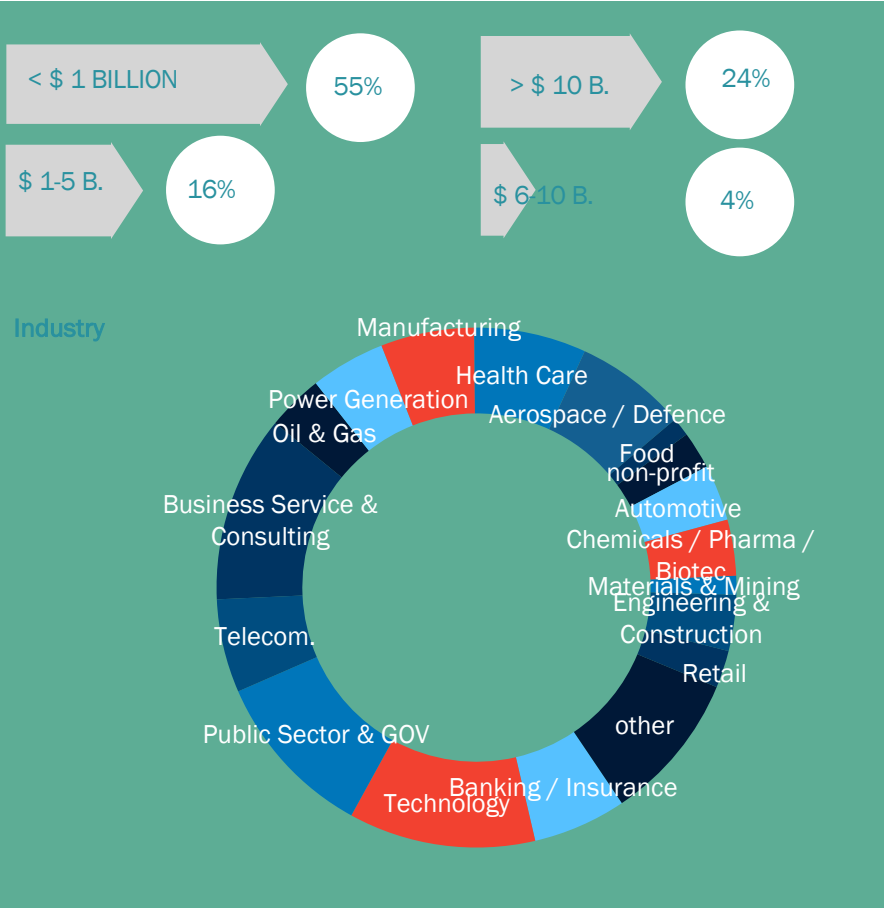
RESPONDENT DEMOGRAPHICS

Respondents from all around the world, every industry & company size

LOCATION OF ORGANIZATION



SIZE OF ORGANIZATION



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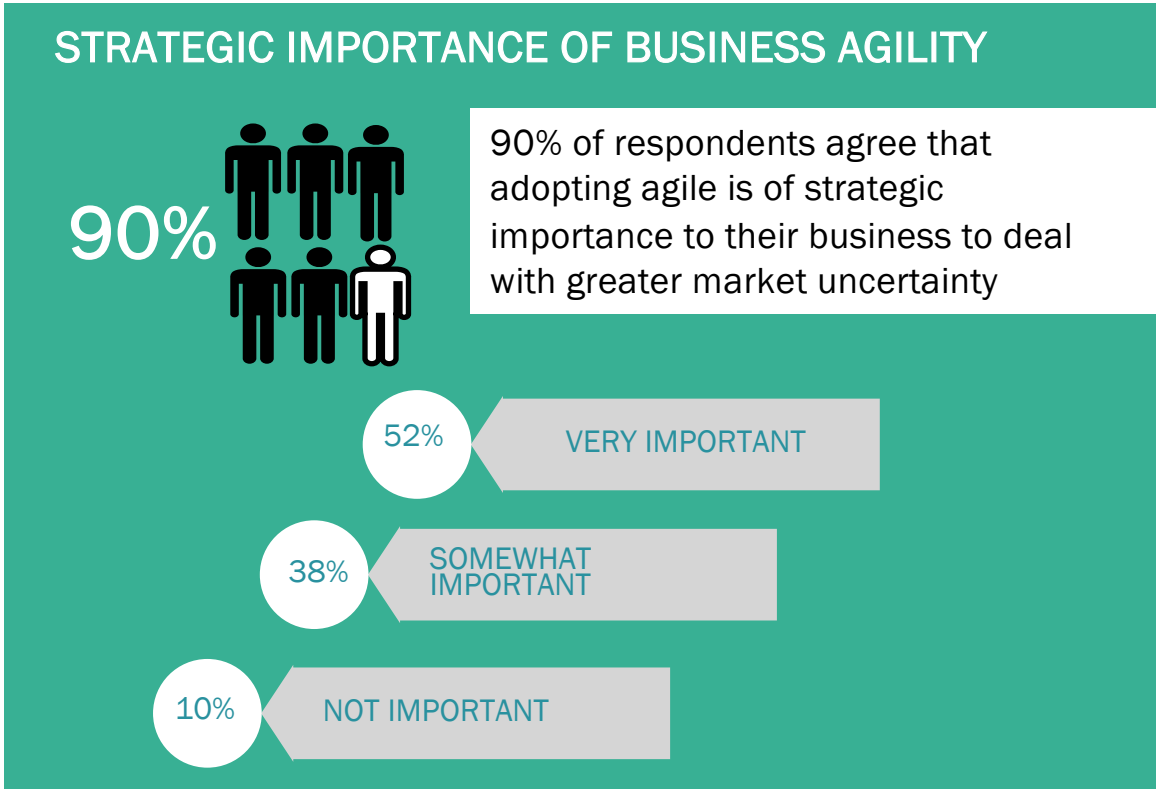
TOP 3 STRATEGIC PRIORITIES BY INDUSTRY

“Business Agility & Adaptability” as their top priority, closely followed by “Innovation & Business Model Evolution” and “Cost Optimization & Profitability.”

	#1	#2	#3
Aerospace / Defence	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Automotive	Business Agility & Adaptability	Training employees to be ready for the next challenges	Innovation & Business Model Evolution
Banking / Insurance / Financial Svcs	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Business Services & Consulting	Business Agility & Adaptability	Innovation & Business Model Evolution	Partner Ecosystem & Collaborative Growth
Chemicals	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Consumer Packaged Goods / Retail	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Engineering & Construction	Business Agility & Adaptability	Innovation & Business Model Evolution	Training employees to be ready for the next challenges
Food / Drink / Tobacco	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Health Care	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Hotels, Leisure & Entertainment	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Legal	Innovation & Business Model Evolution	Business Agility & Adaptability	Supply Chain Resilience & Agility
Manufacturing & Industrial Goods	Business Agility & Adaptability	Cost Optimization & Profitability	Workforce Transformation & Talent Strategy
Materials & Mining	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Media & Publishing	Cost Optimization & Profitability	Business Agility & Adaptability	Innovation & Business Model Evolution
Non-profit & Charity	Business Agility & Adaptability	Training employees to be ready for the next challenges	Innovation & Business Model Evolution
Oil & Gas	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Pharmaceutical / Biotechnology	Business Agility & Adaptability	Innovation & Business Model Evolution	AI-Driven Business Transformation
Power Generation & Utilities	Business Agility & Adaptability	Cost Optimization & Profitability	Training employees to be ready for the next challenges
Public Sector & Government	Business Agility & Adaptability	Innovation & Business Model Evolution	Training employees to be ready for the next challenges
Schools, Education & Training	Business Agility & Adaptability	Cost Optimization & Profitability	Innovation & Business Model Evolution
Technology	Business Agility & Adaptability	Innovation & Business Model Evolution	Cost Optimization & Profitability
Telecommunications	Business Agility & Adaptability	Cost Optimization & Profitability	Innovation & Business Model Evolution
Transportation / Logistics	Business Agility & Adaptability	Innovation & Business Model Evolution	Partner Ecosystem & Collaborative Growth

REASONS FOR ADOPTING AGILE

90% of respondents agree that adopting agile is of strategic importance to their business to deal with greater market uncertainty



REASONS FOR ADOPTING AGILE



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REASONS FOR ADOPTING AGILE

Understanding of Agile vs. reality check

WHAT AGILE MEANS TO OUR RESPONDENTS

#1 Ability to Adapt Quickly to Change

Agile is most commonly associated with the capacity to respond rapidly and effectively to shifting market conditions, emerging priorities, or customer needs.

#2 Flexibility and Simplicity in Process

Many define Agile as a flexible, less bureaucratic approach that streamlines workflows, simplifies value delivery, and reduces complexity while staying outcome-focused.

#3 Collaboration and Empowered Teams

Agile emphasizes cross-functional collaboration, stakeholder engagement, and empowering teams to make decisions and deliver value autonomously.

#4 Customer-Centricity and Value Delivery

Agile is seen as a mindset focused on delivering customer value early and often, involving end users in iterations and continuously adjusting based on feedback.

#5 Continuous Improvement and Learning

Agile is understood as a mindset or framework built on learning, refining, and improving over time in uncertain or complex environments

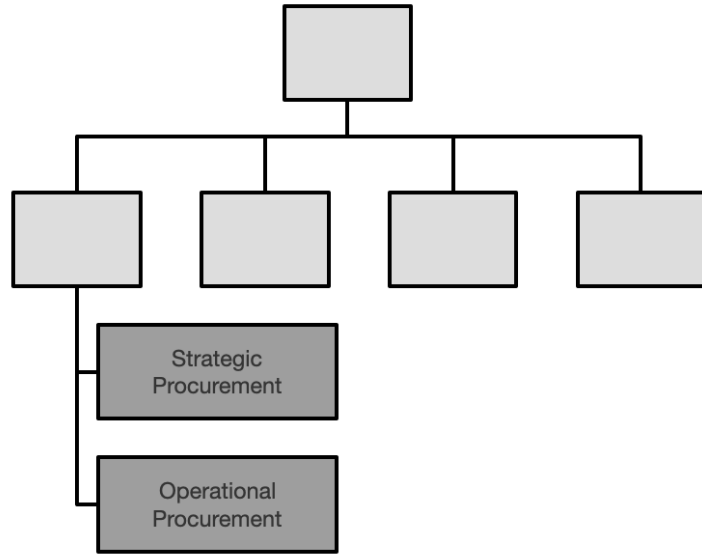
OPERATION IN YOUR TEAM



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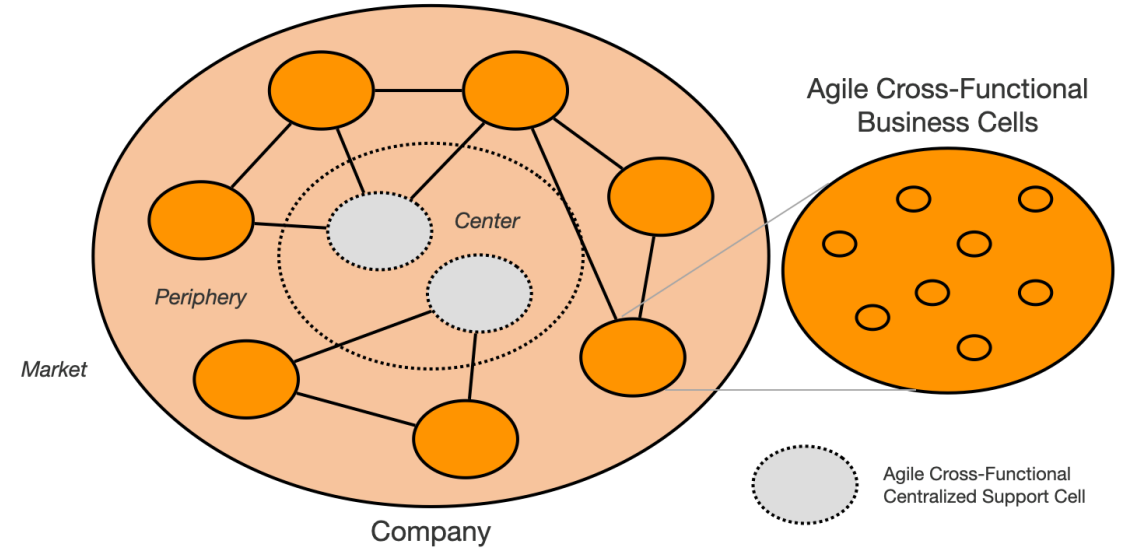
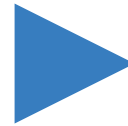
MIND-SHIFT TO COPE WITH UNCERTAINTY

Focus more to Value Creation with a Minimum Viable Bureaucracy!



Formal Structure

Focus



Value Creation Structure

- Minimum Viable Bureaucracy
- Empowered Agile x-funct. Business Cells
- Plattform / Shared Data as the Foundation

Haier - Leading IoT Company in Appliances

80,000 Employees form 4,800 Micro-Enterprises organized around Value

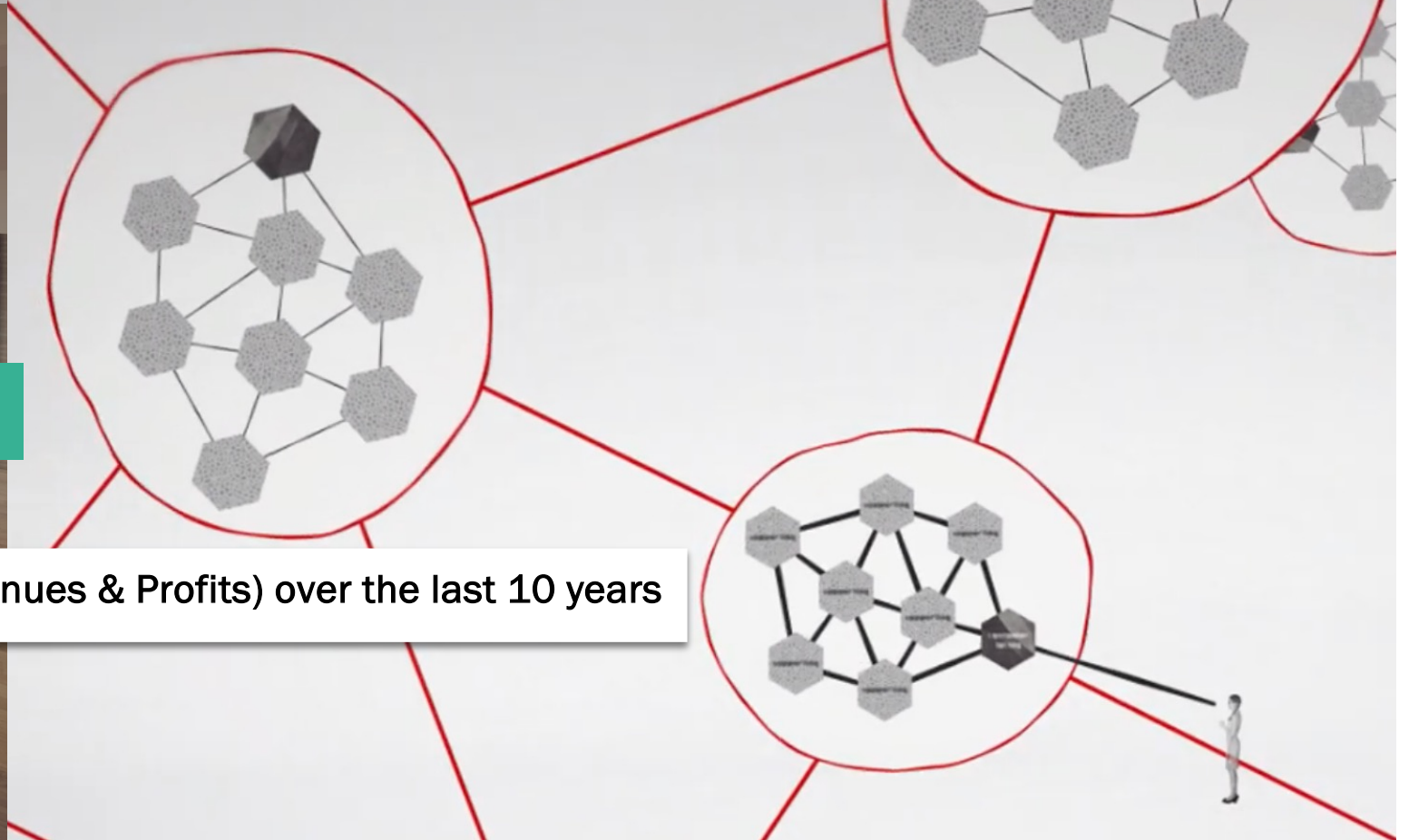
Haier



Business Impact

\$ 2bn Market Value

20% annual Growth (Revenues & Profits) over the last 10 years

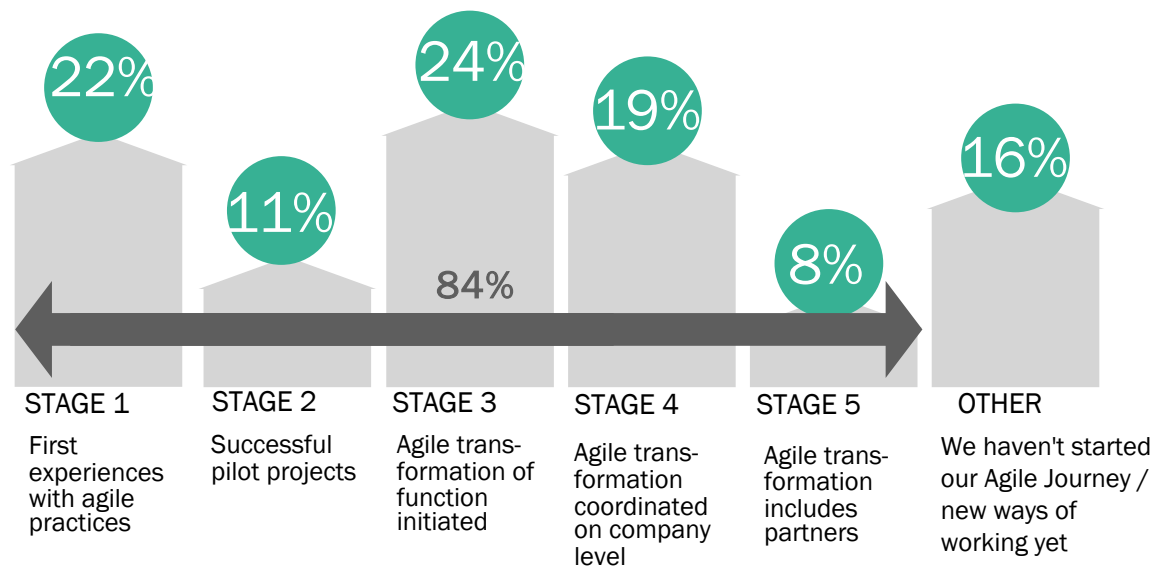


PROGRESS IN ADOPTING AGILE

84% are in some stage of Agile Transformation, just 8% include their partners

MATURITY LEVEL OF YOUR TRANSFORMATION

84% of respondents are at some stage of an agile transformation within their overall organization, a growing minority has coordination at a company level, but just 8% include their external trading partners.



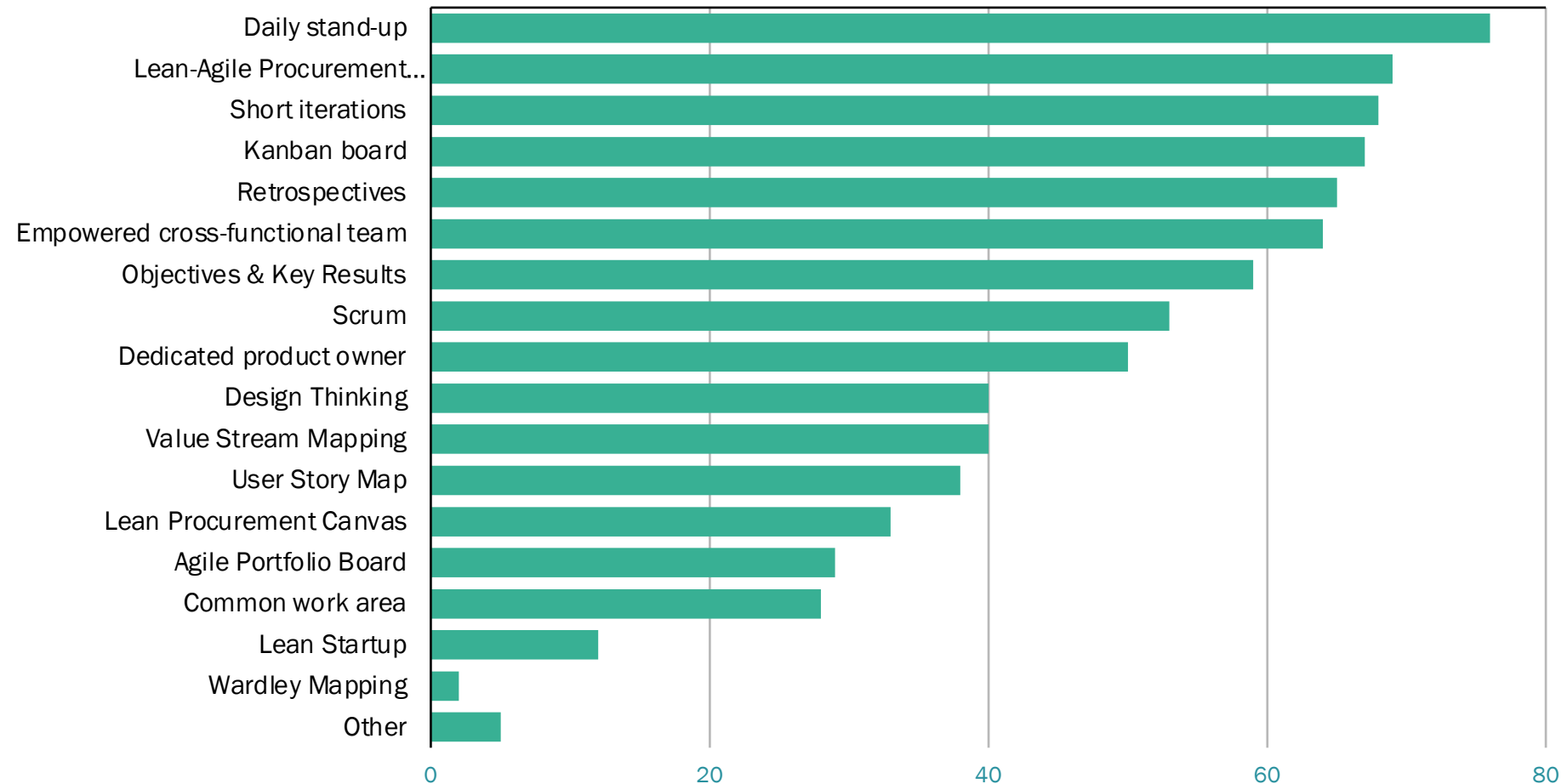
ADOPTION APPROACH TO BECOME MORE AGILE



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AGILE MATURITY

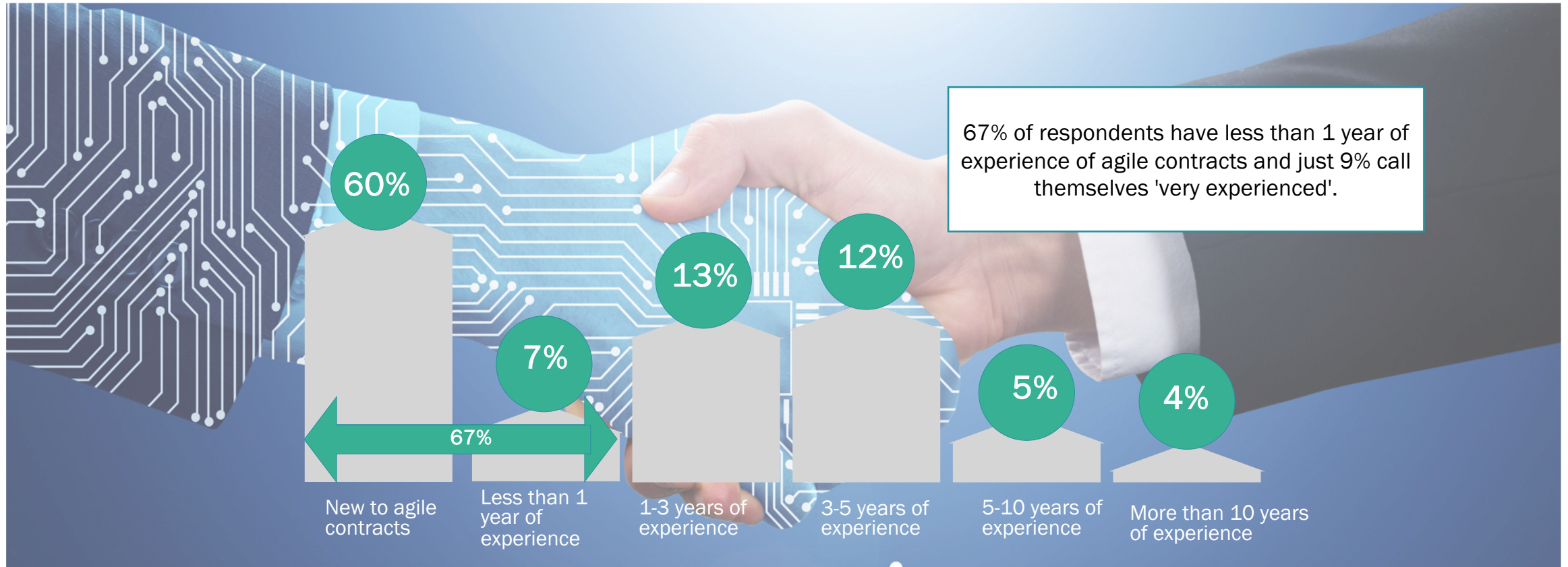
Daily's, Lean-Agile Procurement Short iterations are the most applied Agile Practices in Procurement & Sales



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AGILE MATURITY

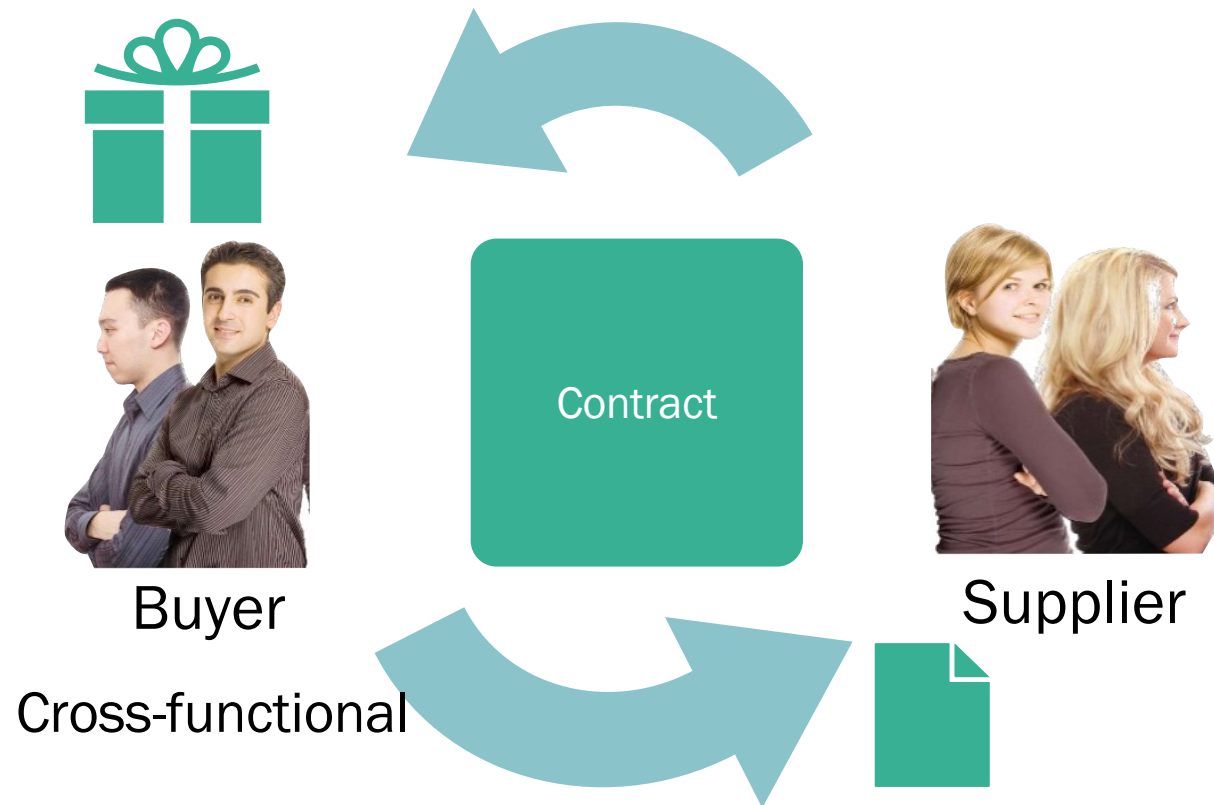
Enabling Agile Collaboration with 3rd Parties via more Agile Contracts is still very immature



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Traditional Contracting

No Trust - The Contract manages Risk



Agile Contracting

Trust-based collaboration that supports an agile Collaboration



Contract

Cross-Company

Agile Contracting

Trust-based collaboration that supports an agile Collaboration

Key Principles & Project characteristics

Focus on common purpose	True synergy by complementarity	Trust based collaboration	Highest level of Transparency	Risk-taking approach & Flexibility for partners	Science, data driven governance & active leadership guidance
<ul style="list-style-type: none"> Develop a vaccine in the fastest possible manner to save lives and end pandemic Tremendous shared sense of purpose across the entire ecosystem led by common focus on the public good (across industry, research community, public institutions and regulators, NGOs) Rapid feedback loops between industry & regulators Commercial interests were not a major rationale for action – neither company had visibility in the beginning into the commercial opportunity 	<ul style="list-style-type: none"> BioNTech brought the innovation and immunological competence, Pfizer brought the clinical competence and execution muscle None of the partners could do it alone with such a speed Similar constellation with Fosun enabling to reach the Chinese population 	<ul style="list-style-type: none"> Existing institutional and personal relationships with Pfizer going back to 2018 fostered mutual trust which leveraged both sides' strengths Trust that science & data will guide us and our decisions Trust that foreseen and unforeseen challenges can be solved in real-time by competent teams Trust that contractual issues could be solved later in a fair-fashion with mutual understanding of the needs of the parties 	<ul style="list-style-type: none"> Unprecedented information sharing in real time – example of commitment to share research findings in real time via preprint publications High public visibility helped to create a spirit of transparency which contributed to high level of trust and a focus on the public good 	<ul style="list-style-type: none"> Against all odds, BioNTech decided to reallocate substantial company resources and start a COVID-19 vaccine program Unprecedented financial risk taking of parties in the presence of uncertainties Typical risk management stage-gates were bypassed due to focus on higher end objectives (for example, developing multiple candidates in parallel to see which ones could be the best, scaling up manufacturing before knowing the outcome of Phase 3 trials) high level of flexibility for the parties to do what needed to be done to reach objectives 	<ul style="list-style-type: none"> Establishment of Joint Committees of subject matter experts (manufacturing, clinical, regulatory, etc.) who meet on a regular basis Establishment of a Joint Steering Committee to discuss and resolve issues. High level of focus on the project at executive levels allowed the organizations to move swiftly when obstacles presented



Ugur Sahin CEO Biotech

In Crisis there's no Time for Contracts

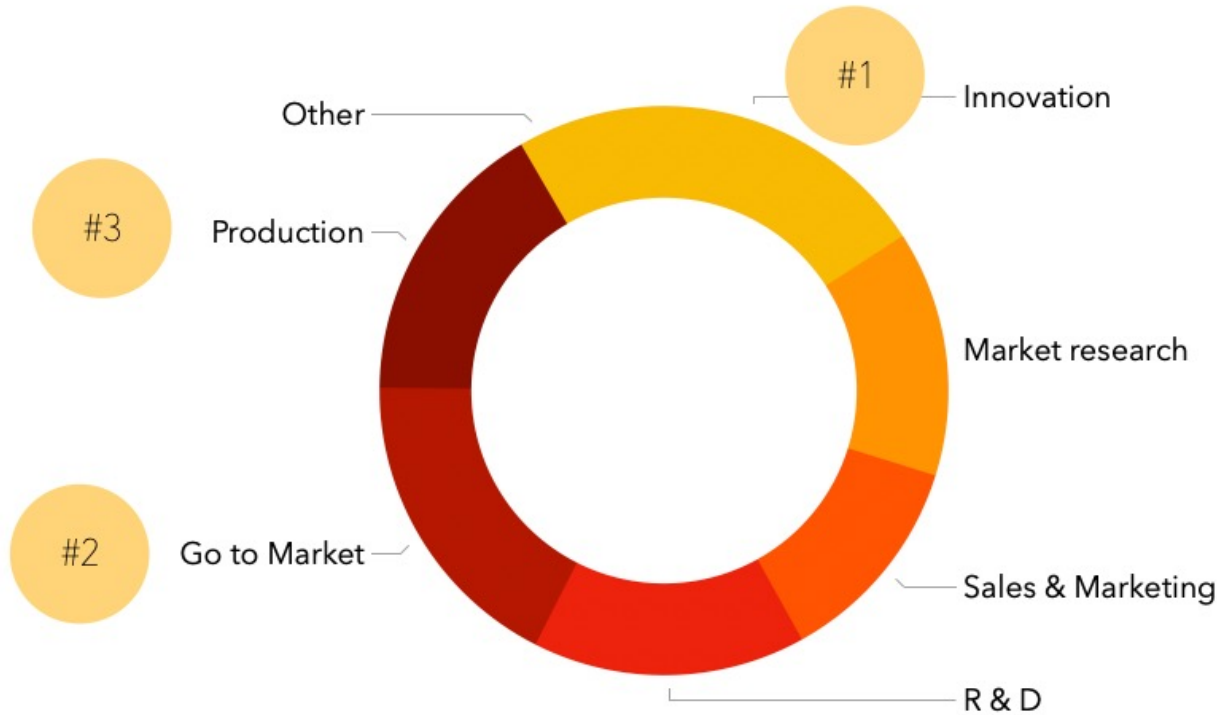
NEXTGEN SUPPLY CHAIN

Scenarios for collaboration with multiple partners



NextGen Supply Chain
in the Age of AI

Scenarios for collaboration with multiple partners / make use of a supply chain

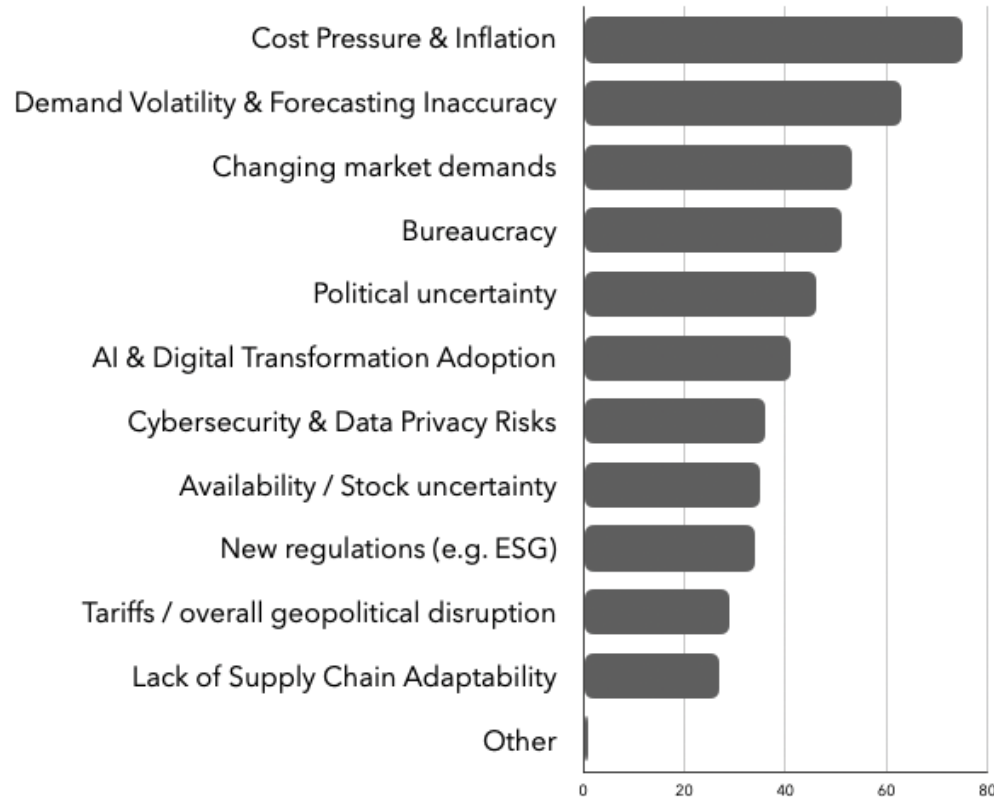


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NEXTGEN SUPPLY CHAIN

Rising market volatility is placing growing pressure on respondents' supply chains

CHALLENGES FOR YOUR SUPPLY CHAIN



KEY STRATEGIES TO OVERCOME UNCERTAINTY IN SUPPLY CHAIN MANAGEMENT

#1 Diversification of Suppliers and Sourcing Channels

- Avoid dependency on single suppliers
- Explore alternative sourcing options (local, regional, global)
- Build redundancy across the supply chain

#2 Stronger Stakeholder & Supplier Collaboration

- Proactive communication and engagement with internal stakeholders, suppliers, and SMEs
- Build long-term partnerships and trust
- Establish supplier relationship management programs (SRM)

#3 Agile & Adaptive Practices

- Implement agile methodologies and iterative planning
- Increase flexibility in contracts and sourcing models
- Use scenario planning and quick response mechanisms

#4 Enhanced Risk & Demand Management

- Develop contingency plans and buffers for critical components
- Conduct proactive risk assessments and mitigation planning
- Improve forecasting accuracy using data and AI

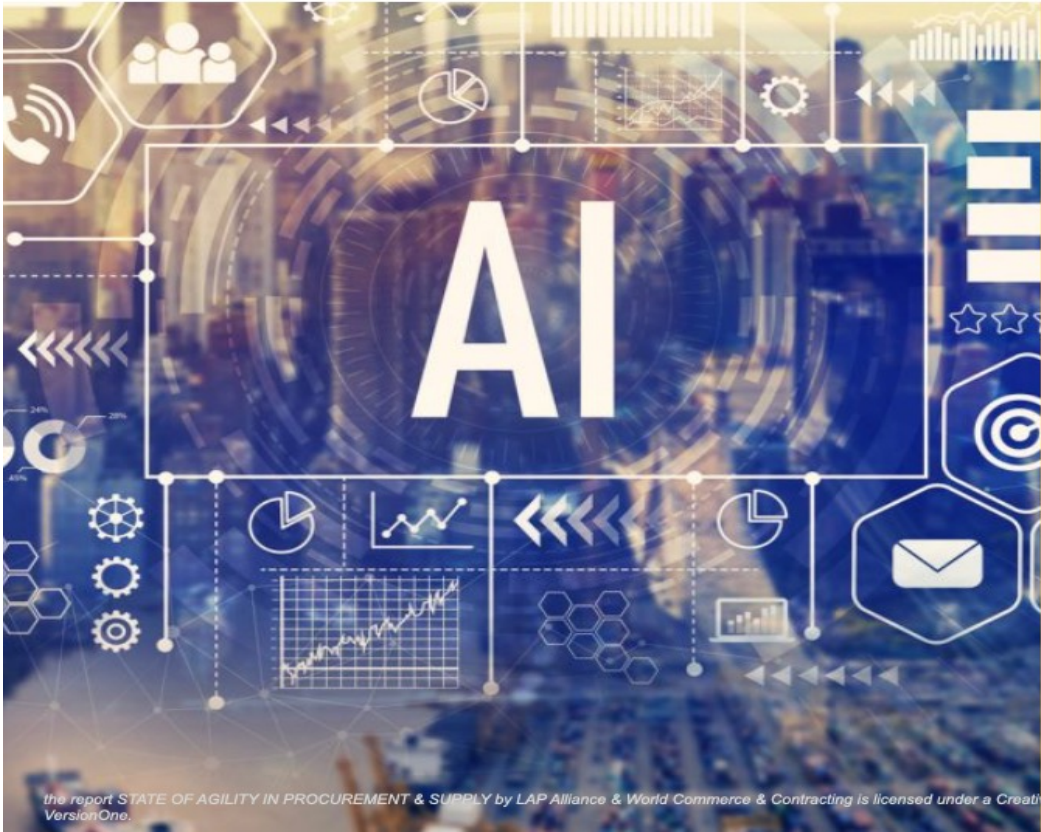
#5 Digitalization & Process Simplification

- Automate processes and adopt digital tools
- Use AI, GenAI, and analytics for real-time insights
- Streamline category management and sourcing policies

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NEXTGEN SUPPLY CHAIN

Artificial Intelligence has already begun to reshape how we work—and its impact is only accelerating



INFLUENCE OF AI IN SUPPLY CHAIN MANAGEMENT & CONTRACTING

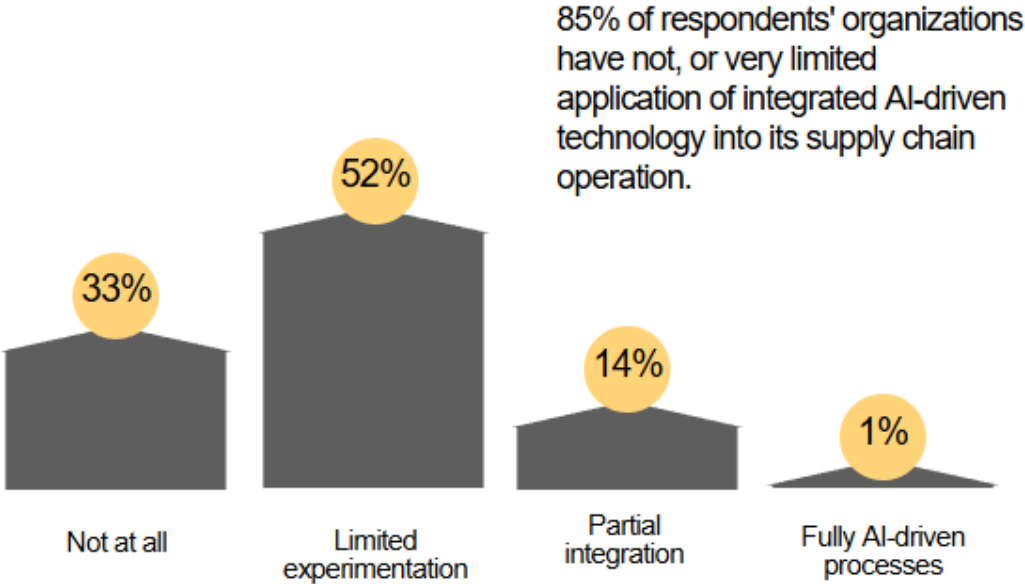


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NEXTGEN SUPPLY CHAIN

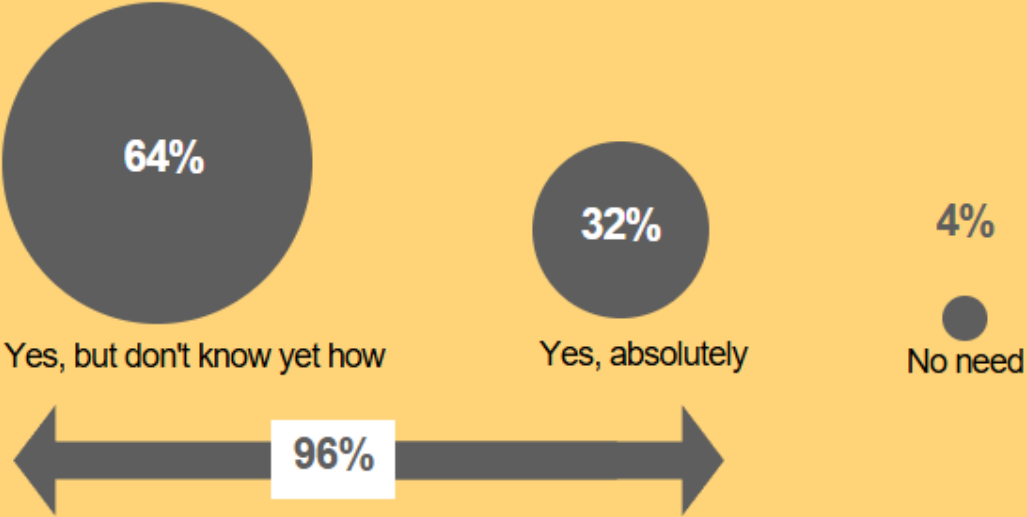
While aligned with reported commercial priorities, the current application of AI in supply chain operations remains limited and largely in an experimental phase

APPLICATION OF AI IN SUPPLY CHAIN OPERATIONS



NEED TO ADJUST YOUR WAYS OF WORKING BECAUSE OF AI

96% of respondents see a need to adjust your ways of working, structures, roles, etc because of AI, while majority doesn't know how!



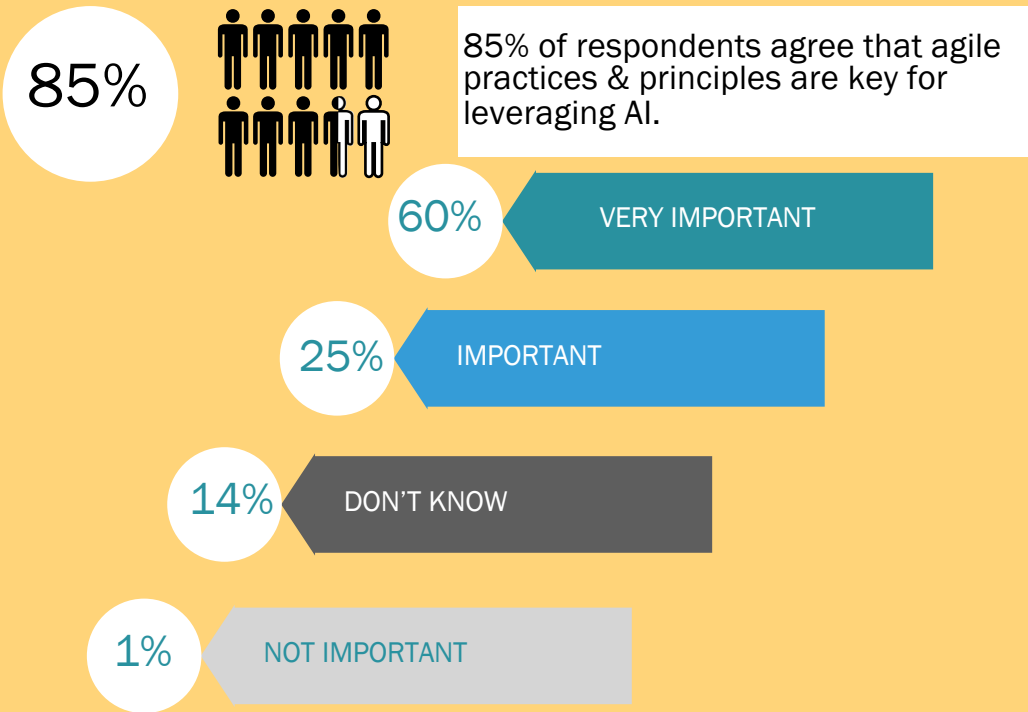
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NEXTGEN SUPPLY CHAIN

85% of respondents agree that agile practices & principles are key for leveraging AI



IMPORTANCE OF AGILE PRACTICES & PRINCIPLES FOR LEVERAGING AI

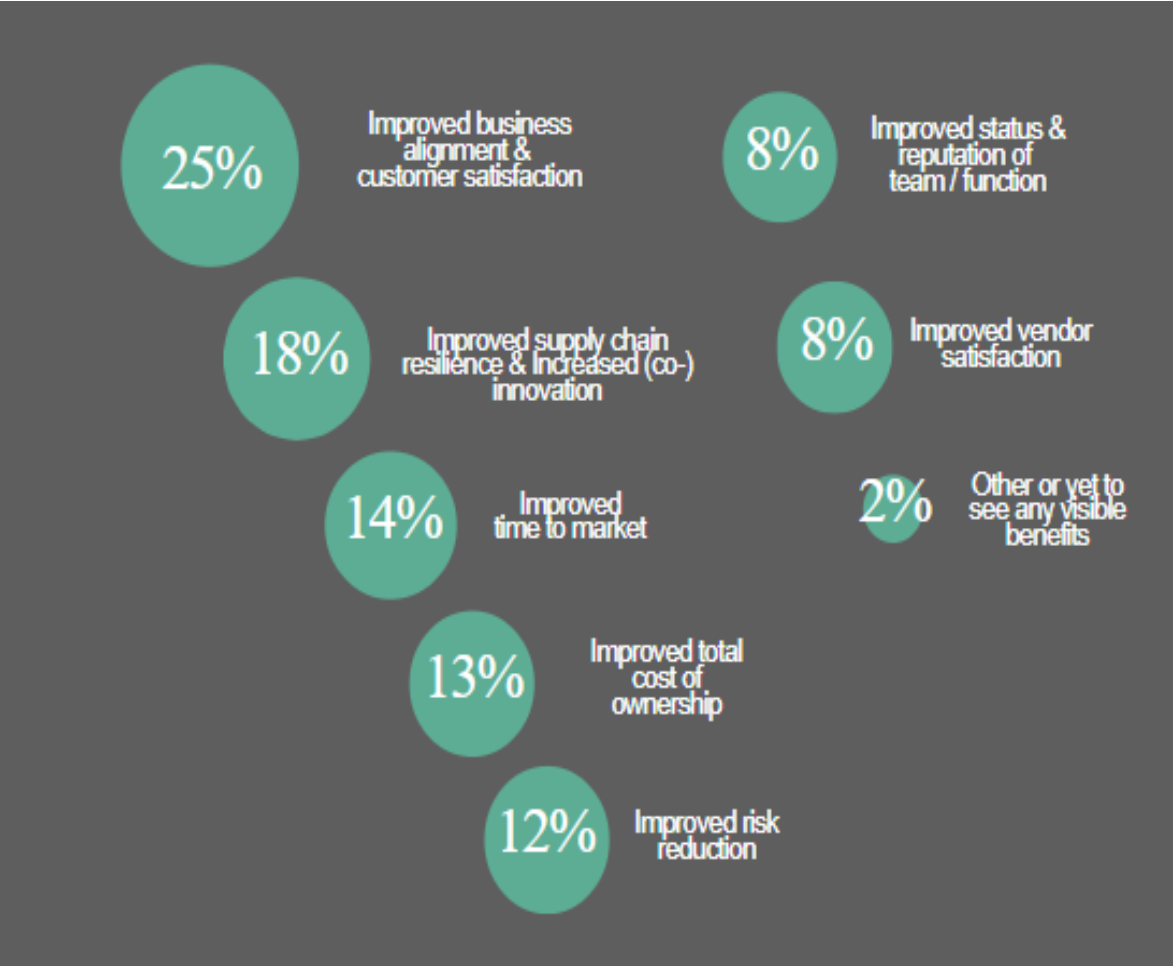


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BENEFITS FROM ADOPTING AGILE

Benefits do match initial challenges, while enablement & culture is biggest challenges

BENEFITS FROM ADOPTING AGILE



CHALLENGES ADOPTING AGILE



Questions

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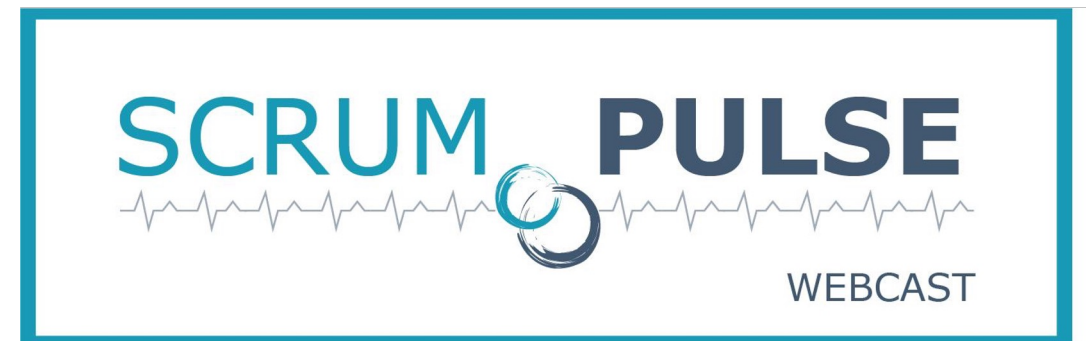
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