



Supply Chain Management (SCM) – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Procurement Outsourcing (PO)
Market Report – March 2017 – Preview Deck

Our research offerings for global services

▶ Market Vista™

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ Application Services

▶ BPS | Banking Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Contact Center

▶ Digital Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | BFSI*

▶ ITS | Healthcare & Life Sciences

▶ IT Services Forecaster™

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

▶ Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- The full report is included in the following subscription(s)
 - **Procurement Outsourcing (PO)**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com



Delhi Office

Office: +91-124-284-1000

india@everestgrp.com

* Banking, financial services, and insurance

Background and methodology of the research

Background of the research

This report examines the dynamics of the global SCM service provider landscape and its impact on the SCM market. Based on the comprehensive Everest Group PEAK Matrix, each of the 11 SCM service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also provides key insights on service provider position & growth in the market, changing market dynamics, and assessment of service provider delivery capabilities. It will assist key stakeholders (service providers, buyers, and technology providers) understand the current state of the SCM service provider landscape

In this research, we analyze the global SCM service provider landscape in 2016. We focus on:

- SCM PEAK Matrix for 2017
- Everest Group analysis of service providers
- Service provider landscape

The scope and methodology of this report includes:

- Coverage of 11 SCM service providers with multi-process capability, namely, Accenture, Capgemini, EXL, Genpact, GEP, HCL, Infosys, OnProcess, TCS, Wipro, and WNS

Table of contents (page 1 of 2)

Topic	Page no.
Background and methodology	5
Executive summary	12
• Summary of key messages	13
Section I: SCM PEAK Matrix 2017	14
• Summary	15
• PEAK Matrix for SCM	18
• Service provider capability assessment	19
Section II: Everest Group analysis on service providers	22
• Accenture	23
• Capgemini	24
• EXL	25
• Genpact	26
• GEP	27
• HCL	28
• Infosys	29
• OnProcess	30
• TCS	31
• Wipro	32
• WNS	33

Table of contents (page 1 of 2)

Topic	Page no.
Service provider landscape	34
• Market share	35
• Market share trends by	
– Geography	36
– Industry	37
– Buyer size	38
Appendix	39
• Glossary of terms	40
• PO research calendar	42
• References	43

Everest Group's SCM research is based on several sources of proprietary information

1

- Everest Group's proprietary database of **500+ SCM contracts** (updated annually)
- The database tracks the following elements of each multi-process SCM contract:
 - Buyer details including industry, size, and signing region
 - Contract details including Total Contract Value (TCV), Annualized Contract Value (ACV), term, start date, and pricing structure
 - Scope including coverage of buyer geography, process, and category
 - Technology including core procurement technology, service provider's add-on tools (if any), ownership, and maintenance
 - Global sourcing including delivery locations and level of offshoring

2

- Everest Group's proprietary database of **operational capability of 11+ SCM service providers** (updated annually)
- The database tracks the following capability elements for each service provider:
 - Key leaders
 - Major SCM clients and recent wins
 - Overall revenue, total managed spend, and SCM employees
 - Recent SCM-related developments
 - SCM revenue-split by geography, industry, and client size
 - SCM delivery locations
 - SCM service suite
 - Quality certifications
 - Procurement-related technological capabilities

3

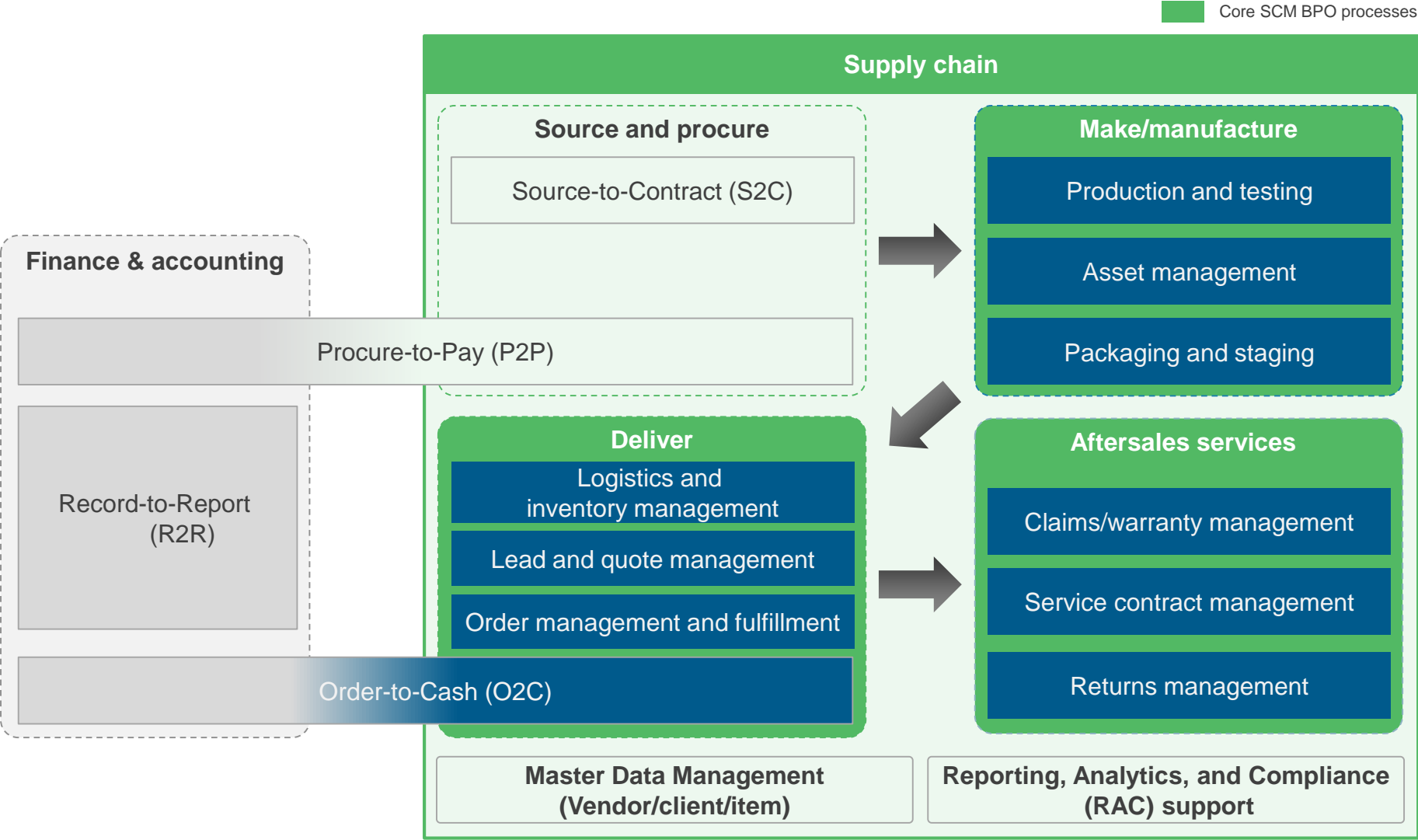
- **Ongoing buyer surveys and interactions**
 - Everest Group's **executive interviews and data collected** from **various buyers**
 - The data contains detailed buyer perspective on SCM contracts, specifically on:
 - ◆ Drivers for adopting SCM and assessment of service provider performance
 - ◆ The level of buyer satisfaction and the underlying reasons

Service providers covered in the analysis



Note: Assessment for Wipro excludes complete service provider inputs on this particular study and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of Wipro's public disclosures, and interaction with buyers

SCM has significant overlaps with Finance and Accounting (F&A) and procurement processes



Overview and abbreviated summary of key messages

This report examines the dynamics of the global SCM service provider landscape and its impact on the SCM market. Based on the comprehensive Everest Group PEAK Matrix, each of the 11 SCM service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also provides key insights on service provider position & growth in the market, changing market dynamics, and assessment of service provider delivery capabilities. It will assist key stakeholders (service providers, buyers, and technology providers) understand the current state of the SCM service provider landscape

Some of the findings in this report, among others, are:

2017 SCM PEAK Matrix

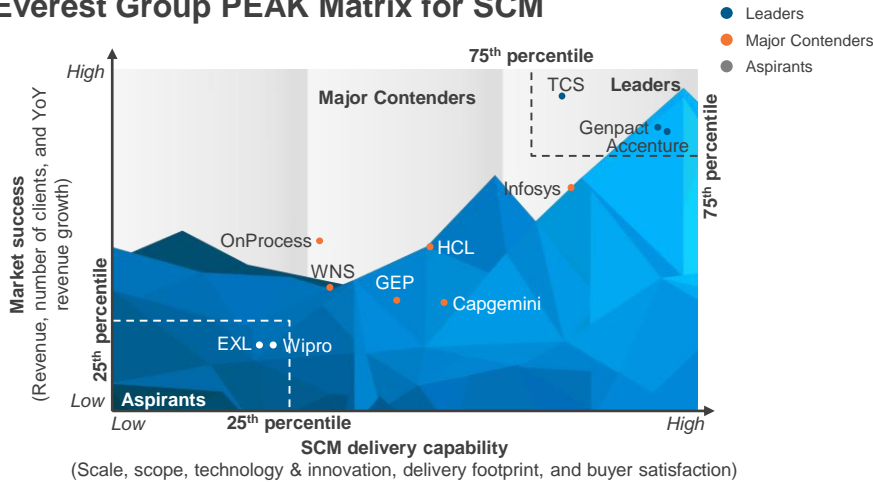
- Everest Group classified 11 SCM service providers on the Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2017 PO PEAK Matrix positioning is as follows:
 - **Leaders:** Accenture, Genpact, and TCS
 - **Major Contenders:** Capgemini, GEP, HCL, Infosys, OnProcess, and WNS
 - **Aspirants:** Wipro, and EXL

Everest Group analysis on service providers

- We assessed the overall SCM capability of service providers by evaluating them along six dimensions – market success, scale, scope, technology & innovation, delivery footprint, and buyer satisfaction levels

This study offers two distinct chapters providing a deep dive into key aspects of SCM service provider landscape; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix for SCM



SCM service provider market share

ACV of active contracts in 2016



SCM Service provider assessment

● Best in Class ● Very High ● High ● Medium High ● Medium ● Medium Low ● Low ● Not Matured

Delivery capability						Market success
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
●	●	●	●	●	●	●

Strengths

- Strong client relationships and a solid track record of delivering high-quality solutions.
- Proven ability to manage complex, multi-faceted supply chain programs.
- Deep expertise in key SCM areas, including procurement, logistics, and inventory management.
- Strong financial performance and a solid track record of delivering high-quality solutions.
- Proven ability to manage complex, multi-faceted supply chain programs.
- Deep expertise in key SCM areas, including procurement, logistics, and inventory management.

Areas of improvement

- Improve client relationships and a solid track record of delivering high-quality solutions.
- Proven ability to manage complex, multi-faceted supply chain programs.
- Deep expertise in key SCM areas, including procurement, logistics, and inventory management.
- Strong financial performance and a solid track record of delivering high-quality solutions.
- Proven ability to manage complex, multi-faceted supply chain programs.
- Deep expertise in key SCM areas, including procurement, logistics, and inventory management.

Capability assessment

● Best in Class ● Very High ● High ● Medium High ● Medium ● Medium Low ● Low ● Not Matured

Service provider	Delivery capability						Market success
	Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall	
Service provider 1	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●

Source: Everest Group (2017)

PO research calendar

■ Published ■ Current

Topic	Release date
Seizing the Robotic Process Automation (RPA) Market Opportunity	October 2015
SDA – The Story Beyond Marketing Messages and an Assessment of SDA Tools	December 2015
Service Delivery Automation (SDA) – Technology Provider Profile Compendium	December 2015
Category Management Outsourcing: The Bridge to Strategic Procurement	December 2015
Clever Machines at Your Service	February 2016
Analytics BPS – Analytics Goes Mainstream – Scope Expands Beyond Traditional Clients and Offerings	March 2016
Heralding a New Era of Transformative Business Process Services through Technology	April 2016
Procurement Outsourcing (PO) – Service Provider Landscape with PEAK Matrix™ Assessment	June 2016
Driving Business Outcomes in Aftersales Supply Chain	May 2016
PO – Annual Report 2016	September 2016
PO – Viewpoint – Procurement Analytics 3.0	February 2017
SCM Service Provider Landscape with PEAK Matrix™ Assessment	March 2017
PO – Service Provider Profile Compendium 2016	Q1 2017
Is the market gearing up for a 3PL revolution in SCM BPO?	Q2 2017
Procurement Outsourcing (PO) – Service Provider Landscape with PEAK Matrix™ Assessment	Q2 2017
Supply Chain Management (SCM) Annual Report – Annual Report 2017	Q3 2017

Additional PO research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

- 1. Procurement Outsourcing (PO) – Driving Business Outcomes in Aftersales Supply Chain** ([EGR-2016-1-R-1758](#)); 2016.
The next-generation of global business process services is being ushered in by drivers that extend beyond traditional metrics such as cost arbitrage. The primary ask of the buyers is now centered on driving business outcomes that are hard to achieve if not clearly defined, contracted for, and executed in that spirit
- 2. Category Management Outsourcing: The Bridge to Strategic Procurement** ([EGR-2015-1-R-1610](#)); 2015. Procurement Outsourcing (PO) has emerged as an efficacious method to generate value for in-house procurement. It started out as an activity focused on cost and spend reduction, but has now evolved into a tool to harness strategic value as evident by the robust growth of this US\$2.1 billion market
- 3. Procurement Outsourcing (PO) – Annual Report 2015: The Dawn of a Transformational Era** ([EGR-2015-1-R-1476](#)); 2015. This report will assist key stakeholders (buyers, service providers, and technology providers) understand the changing dynamics of the PO market and help them identify the trends and outlook for 2014. In this backdrop, the report provides comprehensive coverage of the global PO market including detailed analysis of market size and growth, buyer adoption trends, PO value proposition, solution characteristics, and service provider landscape

For more information on this and other research published by Everest Group, please contact us:

Rajesh Ranjan, Partner
Megan Weis, Vice President
Vatsal Gupta, Senior Analyst
Vishwas Saxena, Senior Analyst
Mansi Arora, Analyst
BPS Team:

rajesh.ranjan@everestgrp.com
megan.weis@everestgrp.com
vatsal.gupta@everestgrp.com
vishwas.saxena@everestgrp.com
mansi.arora@everestgrp.com
BPOresearch@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-804-276-4533

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-647-557-3475

Stay connected

Website



www.everestgrp.com

Social Media



@EverestGroup



@Everest Group

Blog

[Sherpas In Blue Shirts](http://www.sherpasinblueshirts.com)

www.sherpasinblueshirts.com