



SCM BPO – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018

Supply Chain Management (SCM) – Business Process Services (BPS)
Market Report – December 2017: Complimentary Abstract / Table of Contents

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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

- This report is included in the following subscription(s)
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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

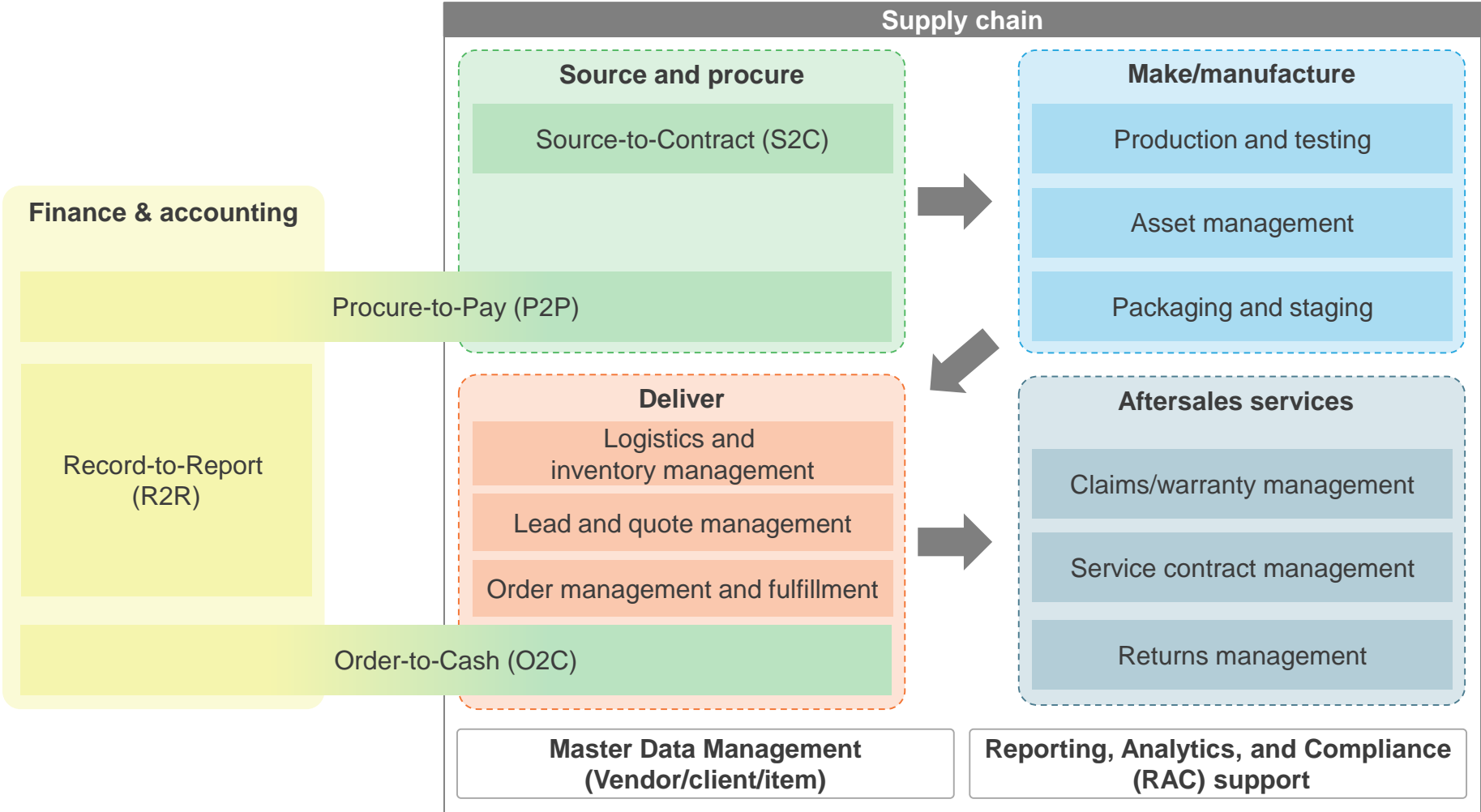
Service providers covered in the analysis



TATA CONSULTANCY SERVICES



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:

2018 SCM BPO PEAK Matrix

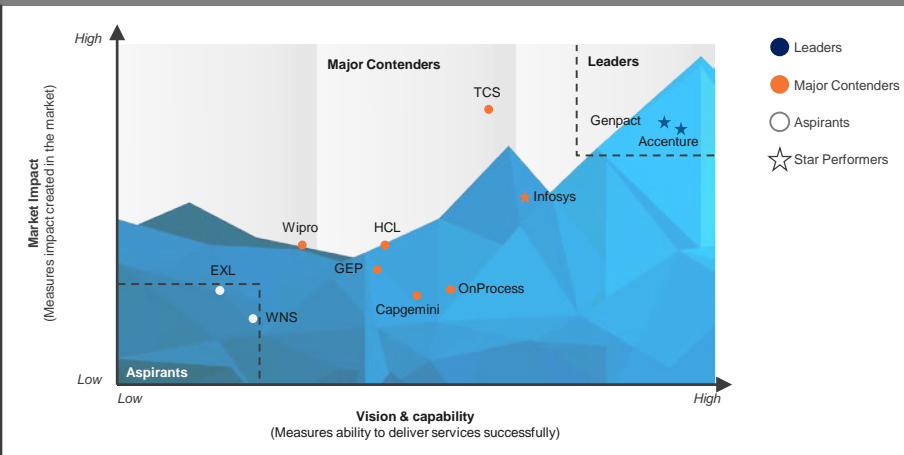
- Everest Group classified 11 SCM service providers on the Everest Group PEAK Matrix into three categories of Leaders, Major Contenders, and Aspirants
- The 2018 SCM BPO PEAK Matrix positioning is as follows:
 - **Leaders:** Accenture and Genpact
 - **Major Contenders:** Capgemini, GEP, HCL, Infosys, TCS, OnProcess, and Wipro
 - **Aspirants:** EXL and WNS

Everest Group analysis on service providers

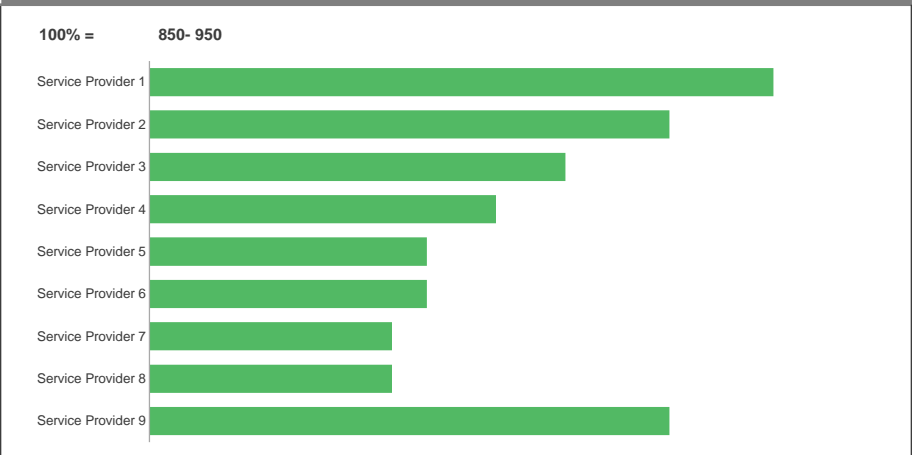
- We assessed the overall SCM capability of service providers by evaluating them along the following dimensions – market adoption, vision and strategy, scope, innovation & investments, delivery footprint, portfolio mix, and value delivered

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

Everest Group Services PEAK Matrix™ for SCM BPO



Market share by service provider



SCM Service provider assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Delivery capability					Market success			
Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall	Market adoption	Portfolio mix	Value delivered¹	Overall
●	●	●	●	●	●	●	●	●

Strengths

- XYZ has registered strong growth in the SCM space and successfully consolidated its position within the Major Contenders category
- It is one of the few service providers that have an increasing focus on the mid-market and SMB segment, and is adding new clients in the category
- It has undertaken strategic partnerships with companies such as AB INC to supplement its capabilities and expertise
- It is focusing on developing modular and flexible solutions involving heavy use of analytics in most of its engagements
- Clients have also highlighted Infosys' flexibility in adjusting to client needs, account management skills, and efficient handling of issues and escalations as its strengths

Areas of improvement

- Despite a robust service offering, XYZ has not been able to replicate the success of its peers. It can look to cross sell SCM services to its existing FAO and PO clients
- Although it is already making investments into expanding its service offering, a specific area that it should focus on is the make/manufacture process to provide an end-to-end SCM offering
- A much more dedicated focus on the after sales services practice can help Infosys further boost its revenue figures. It can also look at building its capabilities in the make/manufacture domain to offer a complete end-to-end SCM service package
- Attrition management is another area of improvement highlighted by its clients

Capability assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Service provider	Delivery capability					Market success			
	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall	Market adoption	Portfolio mix	Value delivered¹	Overall
Service provider 1	●	●	●	●	●	●	●	●	●
Service provider 2	●	●	●	●	●	●	●	●	●
Service provider 3	●	●	●	●	●	●	●	●	●
Service provider 4	●	●	●	●	●	●	●	●	●
Service provider 5	●	●	●	●	●	●	●	●	●
Service provider 6	●	●	●	●	●	●	●	●	●
Service provider 7	●	●	●	●	●	●	●	●	●

Source: Everest Group (2017)

PO research calendar

Published
 Planned
 Current release

Flagship PO reports

Release date

Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	May 2017
PO Service Provider Landscape with PEAK Matrix™ Assessment 2017	June 2017
BPS Delivery Automation (BPSDA) – Service Provider Landscape with PEAK Matrix™ Assessment 2017	July 2017
Procurement Outsourcing (PO) Annual Report – 2017: Leap towards Digital Transformation	July 2017
SCM BPO Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	Dec 2017
Supply Chain Management (SCM) Annual Report – Annual Report 2018	Q1 2018
PO – Service Provider Landscape with PEAK Matrix Assessment 2018	Q1 2018

Thematic PO reports

Release date

Category Management Outsourcing: The Bridge to Strategic Procurement	December 2015
Driving Business Outcomes in Aftersales Supply Chain	May 2016
Unlocking Next-Generation Value through Technology-Embedded Business Process Services	July 2016
PO – Viewpoint – Procurement Analytics 3.0	February 2017
3PL or 4PL: An Increasingly Complex Decision	June 2017
Supplier Management - More than Just Managing Cost and Risk	Q1 2018
Looking beyond the savings - Emerging value levers for CPOs	Q3 2018

Note: For a list of all PO reports published by us, please refer to <http://www2.everestgrp.com/reports?Cat0=990#cat0=831>

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. 3PL or 4PL: An Increasingly Complex Decision** ([EGR-2017-1-V-2151](#)); 2017. This paper explains the differences between 3PL and 4PL providers, as well as the benefits of each; and then examines the evolution of a 3PL provider and different operating models
- 2. Procurement Outsourcing (PO) – Annual report – Leap towards digital transformation** ([EGR-2017-1-R-2245](#)); 2017. This report assists key stakeholders (buyers, service providers, and technology providers) to understand the changing dynamics of the PO market and help them identify the trends and outlook for 2016-2017. In this backdrop, this report provides comprehensive coverage of the global PO market including detailed analysis of market size and growth, PO value proposition, solution characteristics, buyer adoption trends, and service provider landscape
- 3. Procurement Outsourcing (PO) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** ([EGR-2017-1-R-2218](#)); 2017. This report examines the global PO service provider landscape and its impact on the PO market. It focuses on service provider position and growth in the PO market, changing market dynamics & emerging service provider trends, and assessment of service provider delivery capabilities

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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 empower 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.

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