



Supply Chain Management (SCM) BPO – Service Provider Landscape with Services PEAK Matrix™ Assessment 2020

Procurement Outsourcing (PO)

Market Report – December 2019: 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

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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 14 SCM service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also provides key insights into 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) to understand the current state of the SCM service provider landscape.

In this research, we analyse the global SCM service provider landscape during 2018-2019. We focus on:

- Everest Group Services PEAK Matrix™ for SCM BPO
- Everest Group analysis of service providers
- Service provider landscape

The scope and methodology of this report includes:

Coverage of 14 SCM service providers namely Accenture, Axe Bpo, Capgemini, Cognizant, DXC Technology, EXL, Genpact, GEP, HCL, Infosys, OnProcess Technology, TCS, Tech Mahindra, and Wipro

Overview and abbreviated summary of key messages

This report uses Everest Group's proprietary PEAK Matrix™ to assess and rate service providers on various dimensions of their capabilities. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas.

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

Service provider position and growth

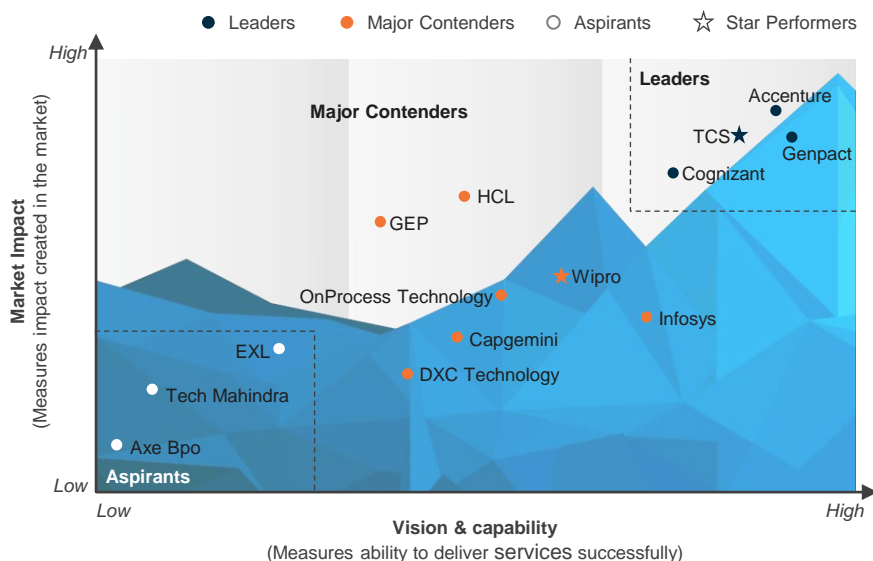
- Everest Group classified 14 SCM service providers on their Everest Group PEAK Matrix into three categories: Leaders, Major Contenders, and Aspirants
- Accenture, Cognizant, Genpact, and TCS are the Leaders
- Major Contenders include Capgemini, DXC Technology, GEP, HCL, Infosys, OnProcess Technology, and Wipro
- Axe Bpo, EXL, and Tech Mahindra are the Aspirants

Key insights on SCM BPS market shares

- While Accenture and Genpact continue to lead the SCM market, others including TCS and Wipro depicted good growth
- North America has the maximum market share followed by Europe and Asia Pacific

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

Assessment of SCM BPS Providers



- Note 1: Assessment for Axe Bpo excludes service provider inputs and is based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers
- Note 2: DXC Technology's evaluation does not consider the management decision to seek strategic alternative to its horizontal business process services units

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	○	○	○
Service provider 3	○	●	○	○	○	○	○	○	○
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	●	●	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	○	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall
●	○	●	○	●	○	○	○	○

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

Research calendar – Procurement Outsourcing (PO)

■ Published ■ Planned ▭ Current release

Flagship PO reports

Release date

Procurement Outsourcing (PO) BPO – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	March 2018
Supply Chain Management (SCM) BPO – Annual Report 2018: Moving Toward a Digital Supply Chain Ecosystem	July 2018
Procurement Outsourcing (PO) Annual Report 2018: Driving Strategic Value from Procurement	September 2018
Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	April 2019
Procurement Outsourcing (PO) Annual Report 2019: Evolving Imperatives for Procurement and What a Chief Procurement Officer (CPO) Should do to Remain Relevant	July 2019
Procurement Outsourcing (PO) Service Provider Compendium 2019	July 2019

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Market Report on After Sales Segment in Supply Chain 2020	Q1 2020
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Thematic PO reports

Understanding Strategic Sourcing and its David and Goliath Landscape	November 2018
Is It Time to Outsource Direct Spend Categories?	February 2019
Journey Toward Integrated Supply Chain Management	June 2019
Procurement Outsourcing (PO) Buyer Report 2019	July 2019
Application of Blockchain in Supply Chain Management – A Trailblazer Analysis	October 2019

Note: For a list of all our published PO reports, please refer to our [website page](#)

Additional PO research references

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

- 1. Procurement Outsourcing (PO) Annual Report 2019 – Evolving Imperatives for Procurement and What a Chief Procurement Officer (CPO) Should do to Remain Relevant** ([EGR-2019-22-R-3245](#)); 2019. 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 2018-2020. In this backdrop, the report covers the global PO market comprehensively including a detailed analysis of market size & growth, buyer adoption trends, key emerging themes, and service provider landscape
- 2. Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** ([EGR-2019-22-R-3143](#)); 2019. This report examines the dynamics of the global PO service provider landscape and its impact on the PO market. Based on the comprehensive Everest Group PEAK Matrix, each of the 16 PO service providers are segmented into Leaders, Major Contenders, and Aspirants. The report also provides key insights into 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 PO service provider landscape

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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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