# Supply Chain Management (SCM) Business Process Outsourcing (BPO) Service Provider Compendium 2020

Procurement Outsourcing (PO)
Market Report – February 2020: 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

**Membership information**

- This report is included in the following research program(s)
  – Procurement Outsourcing (PO)
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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.
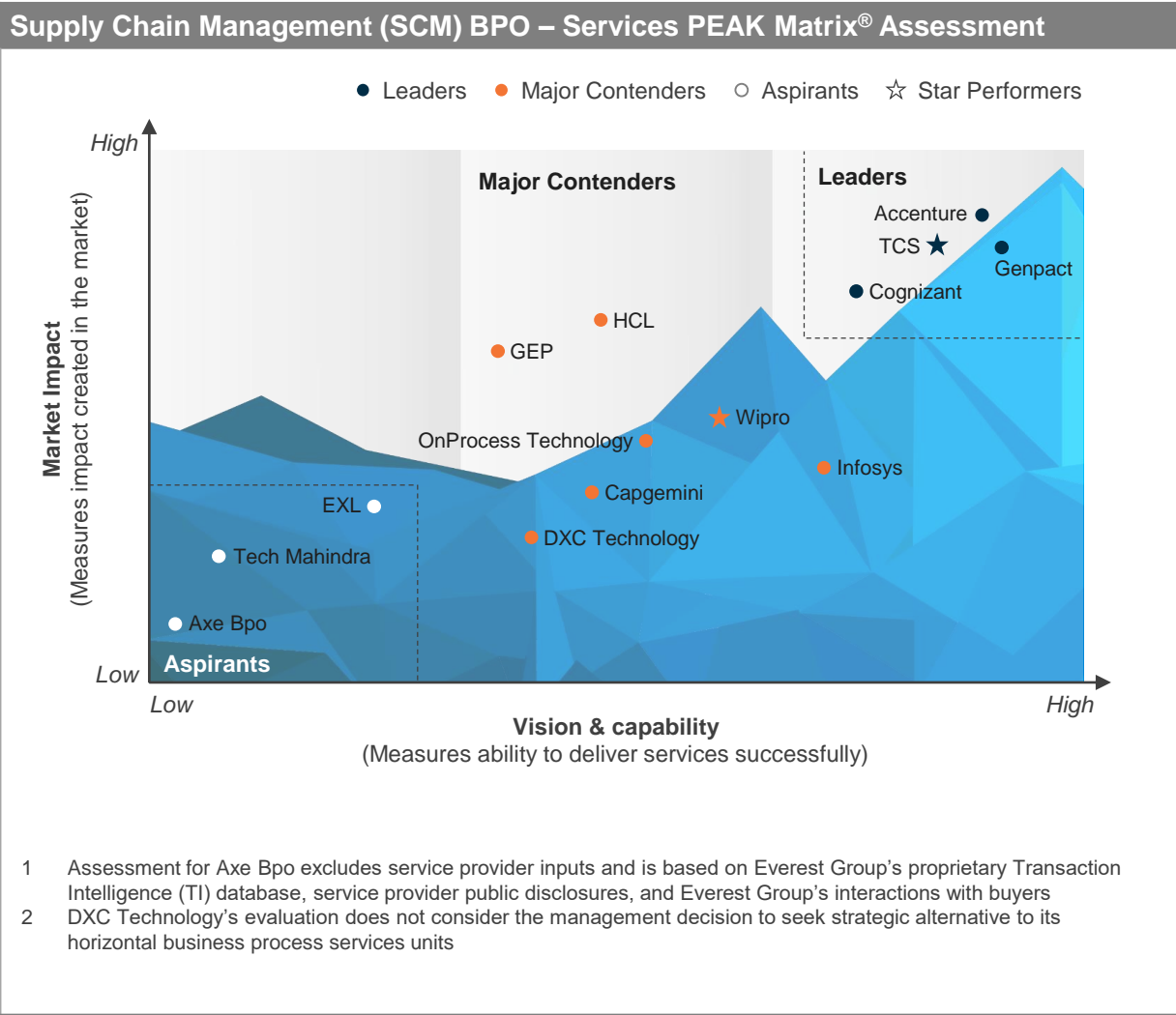
**In this research, we analyse the global SCM service provider landscape during 2018-2019. We focus on:**

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

**The scope of this report includes:**

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

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

## Supply Chain Management (SCM) BPO – Services PEAK Matrix® Assessment

● Leaders   ● Major Contenders   ○ Aspirants   ☆ Star Performers

**Market Impact** (Measures impact created in the market)

High

Low

**Vision & capability** (Measures ability to deliver services successfully)

Low — High

**Major Contenders**

**Leaders**
- Accenture ●
- TCS ★
- Genpact
- ● Cognizant

- ● HCL
- ● GEP
- ★ Wipro
- OnProcess Technology ●
- ● Infosys
- ● Capgemini
- EXL ○
- ● DXC Technology
- ○ Tech Mahindra
- ○ Axe Bpo

**Aspirants**

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
2   DXC Technology's evaluation does not consider the management decision to seek strategic alternative to its horizontal business process services units

## Capability assessment

Measure of capability:  ● High   ◐ Low

| Service provider | Market impact | | | | Vision & capability | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Market adoption | Portfolio mix | Value delivered | Overall | Vision and strategy | Scope of services offered | Innovation and investments | Delivery footprint | 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

Measure of capability:  ● High   ◐ Low

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

**Strengths**
- Growing at double-digit rates, service provider significantly increased the number of new clients as well as business from existing clients. As of 2019, the service provider has close to 200 clients globally, to whom it is providing supply chain management support
- Service provider is one of the few service providers to have strong presence as well as strong offerings across the entire spectrum of the supply chain, starting with order management and after sales support upstream to production & asset management downstream

**Areas of improvement**
- Service provider 1 should increase offerings of value-added services such as order management, asset management, and logistics management
- 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

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# Research calendar – Procurement Outsourcing (PO)

| Flagship PO reports | Release date |
|---|---|
| Supply Chain Management (SCM) BPO – Service Provider Landscape with Services PEAK Matrix® Assessment 2020 | December 2019 |
| **Supply Chain Management (SCM) BPO – Service Provider Profile Compendium 2020** | **February 2020** |
| Intelligent Automation in BPS PEAK Matrix® Assessment with Service Provider Landscape | Q1 2020 |
| PO PEAK Matrix® Assessment with Service Provider Landscape | Q1 2020 |
| SCM Annual Report | Q2 2020 |
| PO Service Provider Profile Compendium | Q2 2020 |
| Intelligent Automation State of the Market | Q2 2020 |
| PO Annual Report | Q2 2020 |
| PO SCM buyer report | Q3 2020 |

| Thematic PO reports | |
|---|---|
| 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 |
| Preparing for recession | Q1 2020 |
| State of the After-sales Market: The Past, Present, and Future | Q1 2020 |
| Viewpoint on Perfect Order Management | Q3 2020 |
| Evolution of transition, engagement, and governance models in BPS | Q4 2020 |

Note:    For a list of all of our published PO reports, please refer to our website page

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# Additional PO research references

**The following documents are recommended for additional insight on 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. **Supply Chain Management (SCM) BPO – Service Provider Landscape with Services PEAK Matrix® Assessment 2020** (EGR-2019-22-R-3451); 2019. 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) understand the current state of the SCM service provider landscape

2. **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

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