

Supply Chain Management (SCM) BPS – Service Provider Landscape with PEAK Matrix® Assessment 2022

December 2021: Complimentary Abstract / Table of Contents



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Tracking: service providers, locations, risk, technologies

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Background and scope of the research

The pandemic has caused disruptions to global supply chain on an unprecedented scale. Organizations faced multiple challenges concurrently including supply discontinuity, change in customers' demand and buying pattern, and production disruptions due to limited inventory. SCM service providers have played a crucial role in supporting enterprises to maintain business continuity, manage disruption, and navigate through the crisis. They are also increasingly helping enterprises in embarking on a digital transformation journey to become more resilient in dealing with uncertainties and disruptions in the future. They continue to strengthen their domain expertise, operational abilities, and digital capabilities through continued investments in enhancing in-house capabilities as well as through acquisitions and alliances with various technology providers to cater to clients' requirements.

The SCM BPS provider landscape consists of a spectrum of providers including specialist providers, pure-play procurement and SCM-focused providers, broad-based BPS providers, and IT and BPS providers. In this research, we present an assessment of 14 SCM service providers featured on the Supply Chain Management (SCM) BPS PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading supply chain service providers, client reference checks, and an ongoing analysis of the SCM business process services market.

In this research, we analyze the global SCM BPS service provider landscape and assess 14 SCM service providers. We focus on:

- Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2022
- Service provider capability assessment
- Enterprise sourcing considerations

Scope of this report:



Geography
Global



Service providers
14



Services
Supply Chain
Management (SCM)

Overview and abbreviated summary of key messages

Everest Group PEAK Matrix® is a proprietary framework for assessment of relative market impact and vision & capability. Everest Group classifies 14 service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. This report examines the SCM BPS service provider landscape and provides analysis of their key strengths and limitations. It also identifies the key implications of the research findings and sourcing considerations for enterprises.

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

SCM BPS PEAK Matrix® 2022

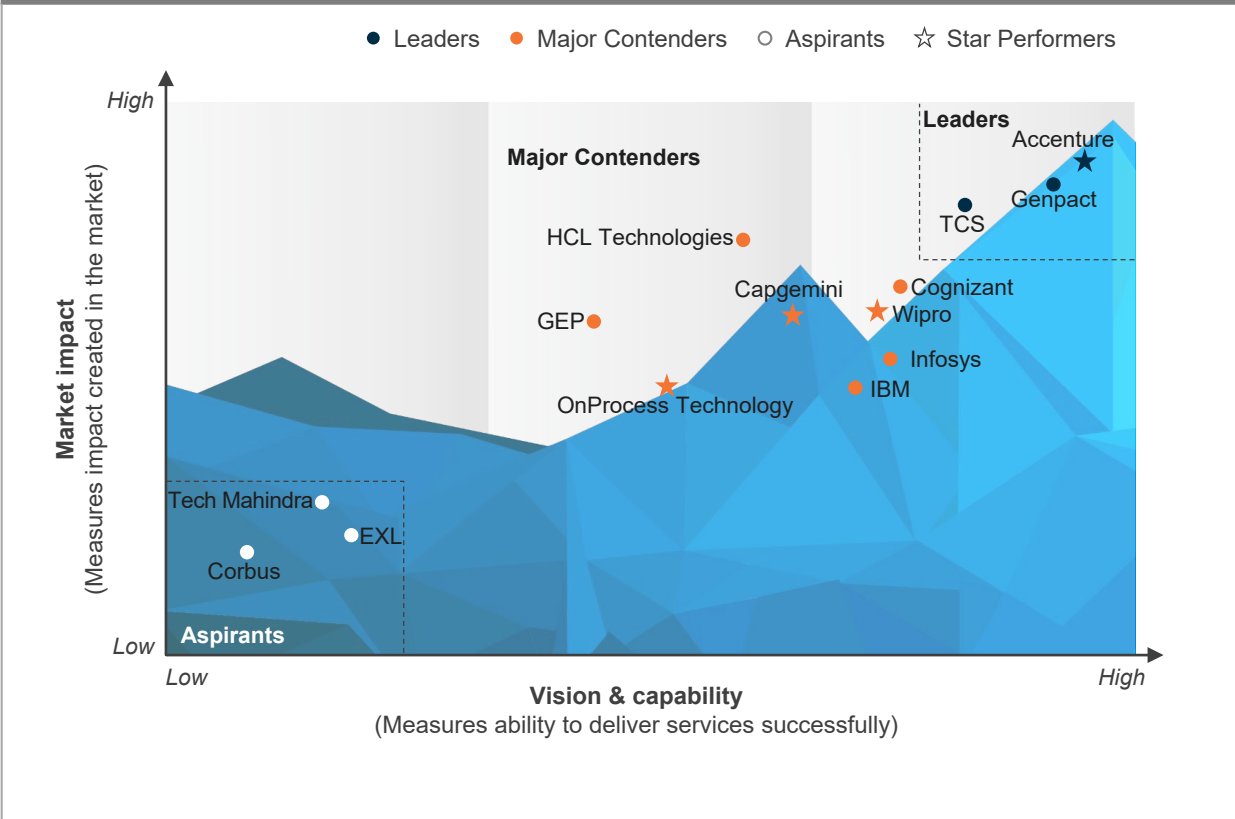
- Everest Group classifies 14 SCM service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
 - **Leaders:** Accenture, Genpact, and TCS
 - **Major Contenders:** Capgemini, Cognizant, GEP, HCL Technologies, IBM, Infosys, OnProcess Technology, and Wipro
 - **Aspirants:** Corbus, EXL, and Tech Mahindra
- Based on YoY movement of different service providers on the PEAK Matrix® Everest Group identified three service providers as the 2021 SCM Market Star Performers – Accenture, Capgemini, OnProcess Technology, and Wipro

Key insights into SCM service providers landscape

- The top four providers contributed more than 50% of the market share in terms of ACV
- Accenture, HCL Technologies, Genpact, and TCS consistently stand out as the top providers across major industries and geographies
- Significant difference exists between the client satisfaction scores of Leaders and other providers, especially in next-generation technology capabilities and implementation/transition parameters

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

Everest Group Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2022



Note: Assessment for Corbus 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 SCM buyers.
Source: Everest Group (2021).

Capability assessment

Illustrative example

Measure of capability: 🟡 Low 🔵 High

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

Illustrative example

Measure of capability: 🟡 Low 🔵 High

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

- Service provider 1 continues to strengthen its supply chain capabilities to support clients across the entire spectrum of supply chain through in-house developments, strategic partnerships, and acquisitions
- It is one of the few providers that provides Supply Chain-as-a-Service offerings such as Planning-as-a-Service, especially for SMB and mid-market clients

Limitations

- Service provider 1 experience catering to industries, such as healthcare & pharma and financial services, is relatively small when compared to its expertise in other industries
- It's experience serving clients in emerging locations such as Asia Pacific is relatively less

Research calendar

Procurement Outsourcing (PO)

■ Published
 ■ Planned
 ■ Current release

Flagship reports

	Release date
Supply Chain Management (SCM) BPO State of the Market Report 2020: COVID-19, A Wake-up Call for SCM	October 2020
Elevating Procurement's Role in the Next Normal Through Digital Enablement – Procurement Outsourcing (PO) State of the Market Report 2021	December 2020
Procurement Outsourcing (PO) – Service Provider Landscape with Services PEAK Matrix® Assessment 2021	August 2021
Procurement Outsourcing (PO) – Service Provider Compendium 2021	September 2021
Supply Chain Management (SCM) BPS – Service Provider Landscape with PEAK Matrix® Assessment 2022	December 2021
Procurement Outsourcing (PO) State of the Market Report 2021	Q1 2022
Supply Chain Management (SCM) BPS – Service Provider Compendium 2022	Q1 2022
Supply Chain Management (SCM) State of the Market Report 2022	Q1 2022

Thematic reports

	Release date
Weaving a Customer-centric Supply Chain Through Effective After-sales Services	July 2020
Future-proofing Supply Chain Management: Building Resilience and Agility through Digital Transformation	December 2020
Business Process Services (BPS) 4.0: Heralding the Start of a New Era	February 2021
Getting Your Business in Order through Integrated Order Management	July 2021
Achieving Sustainable Cost Reduction through Digital Technologies	October 2021
Enterprise Risk Management in the Post-COVID World	December 2021
Collapsing the Supply Chain: Top 14 start-ups Redefining Real-Time Transportation Visibility	December 2021
Procurement Outsourcing (PO) – Evolving buyer expectations	Q1 2022

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



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