Internet of Things (IoT) Supply Chain Solutions PEAK Matrix® Assessment 2022

November 2021: Complimentary Abstract / Table of Contents

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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Background of the research

Business resilience has been top priority for enterprises as they aim to revive and grow their businesses in a post-pandemic era. Digitization of their existing supply chain is the first step in achieving this goal, and Internet of Things (IoT) technology lies at the center of this. Around 40% firms have already embarked on this journey, leveraging IoT to develop an interconnected supply chain that brings together suppliers/vendors, logistics providers, manufacturers, wholesalers/retailers, and customers dispersed by geography. This is aiding firms in better demand forecasting, tracking and tracking of products and fleet, and better monitoring of asset conditions. As enterprises aim to accelerate the time-to-market of their supply chain initiatives, leverage of IoT-based solutions becomes pertinent for them. In this regard, they are partnering with IoT solution and service providers.

In this research, we present an assessment of solution as well as service providers that exhibit a strong focus on supply chain through their IoT-based solutions. This includes only providers that have developed IoT-enabled solutions aimed at addressing challenges across the supply chain landscape with use cases including, but not limited to, fleet management, inventory management, warehouse management, and cold chain monitoring.

The assessment of these providers is featured on the IoT supply chain solutions PEAK Matrix®. Each solution provider profile provides insights into their strengths and limitations across themes including, but not limited to, services, investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2021, interactions with leading IoT supply chain solution providers, client reference checks, and an ongoing analysis of the IoT solutions market.

We have assessed the following 11 solution providers on the IoT supply chain solutions PEAK Matrix®:

- **Leaders:** Hitachi Vantara and TCS
- **Major Contenders:** Bosch, FourKites, Mindtree (NxT), NTT DATA, Project 44, Roambee, and Samsara
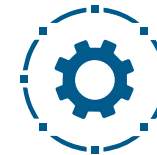- **Aspirants:** FarEye and Shippeo

Scope of this report:

Geography
Global

Solution providers
11

Solutions
IoT supply chain solutions

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Overview and abbreviated summary of key messages

This report examines the IoT supply chain solution provider landscape. It focuses on solution provider position, assessment of the provider capabilities, and key strengths and limitations of these solution providers. It also identifies the key implications of the research findings for buyers and solution providers.

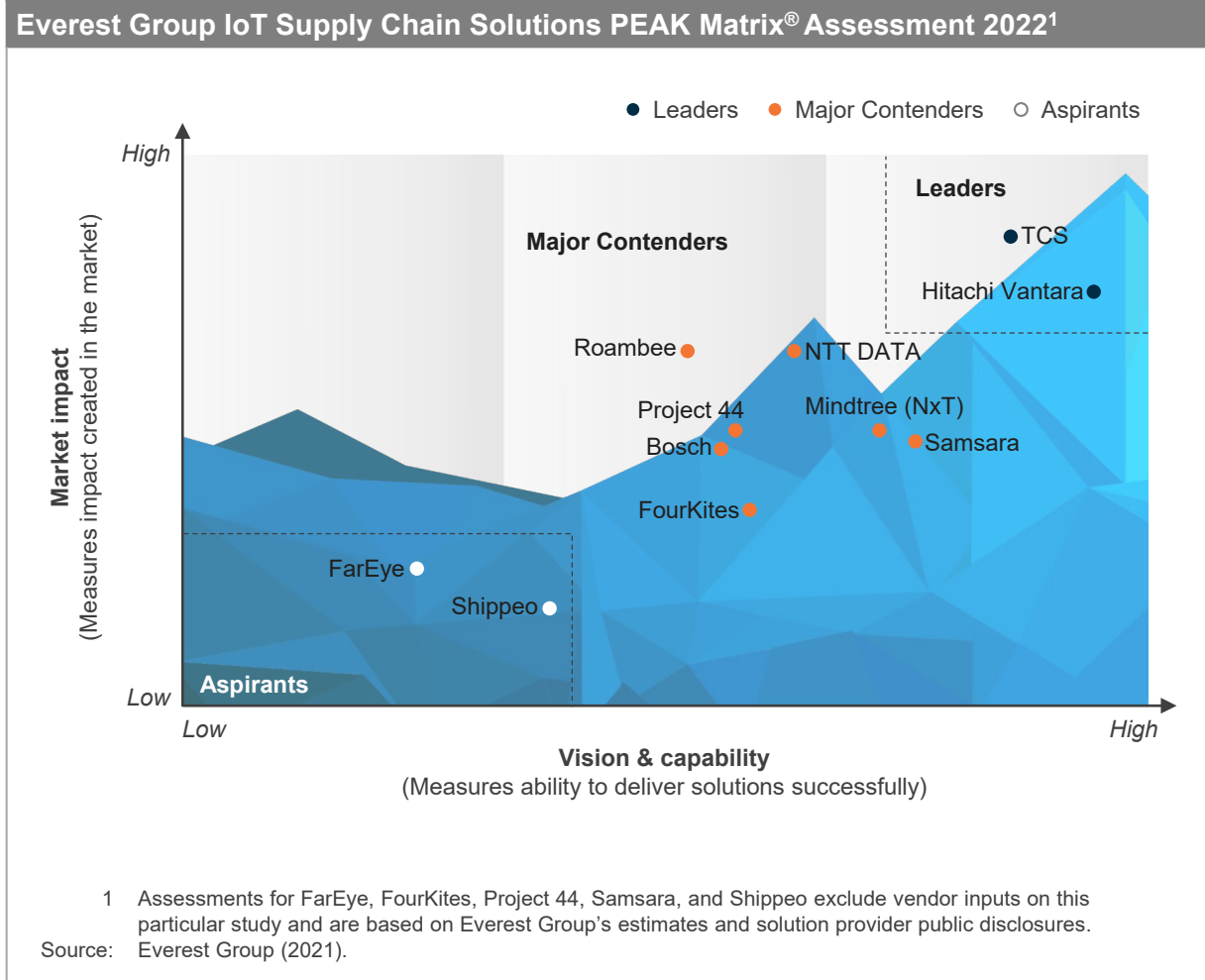**Some of the findings in this report, among others, are:**

IoT solution provider capability

- IoT supply chain solution providers can be classified into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Hitachi and TCS are the Leaders in this IoT supply chain solutions PEAK assessment. Several specialist solution providers, IT service providers, as well as technology companies are emerging as Major Contenders

Solution provider characteristics

- Leaders have invested in a robust portfolio of supply chain solutions leveraging IoT and next-generation technologies such as AI/ML, blockchain, and edge computing to provide real time insights to customers
- Strong partner ecosystem with specialist supply chain providers across warehouse management, control towers, transportation management systems, etc. supplemented by innovative use cases that go beyond tracking and tracing of supply chain elements is helping the Leaders differentiate themselves from peers
- Most of the Major Contenders are strengthening their track and trace offerings within supply chain by enhancing the multi-modal capabilities in this arena through acquisitions and partnerships
- Major Contenders would benefit from leveraging next-generation technology across their solution portfolio as clients seek to accelerate the decision-making process
- Aspirants aim to become strong regional supply chain solution providers in their target geographies as is exhibited by their investments in these regions
- Aspirants would benefit from expanding their partnership to include service partners to aid them in service integration support for their solutions across the enterprise landscape
- They would also need to showcase innovative use cases that go beyond track and trace within supply chain to enhance their market recognition and adoption

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This study offers a deep dive into key aspects of the IoT supply chain solutions market; below are three charts to illustrate the depth of the report

Everest Group IoT Supply Chain Solutions PEAK Matrix® Assessment 2022[1]

Illustrative example

● Leaders　● Major Contenders　○ Aspirants

Leaders

●TCS

Hitachi Vantara ●

Major Contenders

Roambee ●

●NTT DATA

Project 44 ●

Mindtree (NxT)

Bosch ●

● Samsara

FourKites ●

FarEye ○

Shippeo ○

Aspirants

Y-axis: **Market impact** (Measures impact created in the market) — High / Low

X-axis: **Vision & capability** (Measures ability to deliver solutions successfully) — Low / High

Capability assessment

Illustrative example

Measure of capability: ◔ Low　● High

Platform vendor	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Services capability	Innovation and investments	Engagement and commercial model	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	◔	◔	◑	◔	◑	◔	◕	◑	◑	◑

Everest Group's remarks on solution providers

Illustrative example

Measure of capability: ◔ Low　● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Services capability	Innovation and investments	Engagement and commercial model	Overall
◕	◔	◕	◕	◕	●	◑	◑	◑	◑

Strengths

- Solution provider 1, has made significant investments in developing proprietary solutions leveraging next-generation technologies such as edge computing and AI/ML
- Clients appreciate the flexibility exhibited by solution provider 1 in its engagements

Areas of improvement

- Solution provider 1 should increase its presence in fast growing regions such as APAC
- It should try to expand partnership with specialist supply chain platform providers to expand its capabilities in this arena

1　Assessments for FarEye, FourKites, Project 44, Samsara, and Shippeo exclude vendor inputs on this particular study and are based on Everest Group's estimates and solution provider public disclosures.

Source:　Everest Group (2021).

Research calendar
Digital services

Flagship reports	Release date
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2021 – Service Provider Compendium	December 2020
Artificial Intelligence (AI) Services – State of the Market Report 2021 | Scale the AI Summit Through Democratization	January 2021
Digital Interactive Experience (IX) Services State of the Market Report 2021 – Moving from Persuasive to Purpose-driven Experiences	February 2021
Digital Services – Market Report 2021: Digital Transformation – Fostering Value Through Rearchitecting Change Management	April 2021
Digital Experience Platform (DXP) Products PEAK Matrix® Assessment 2021	August 2021
Internet of Things (IoT) Supply Chain Solutions PEAK Matrix® Assessment 2022	**November 2021**
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2022	Q4 2021
Sustainability Services PEAK Matrix® Assessment 2022	Q4 2021
Digital Twin Services PEAK Matrix® Assessment 2022	Q1 2022

Thematic reports	Release date
Customer Data Platform Trailblazers: Top 15 Start-ups Redefining Hyper-personalization	March 2021
Operationalizing Machine Learning at Scale (MLOps)	April 2021
Federated Learning: Privacy by Design for Machine Learning	May 2021
Smart Spaces Transcending Physical Boundaries	September 2021
Viewpoint on Artificial Internet of Things (AIoT)	Q4 2021
Trailblazers on Commerce Solutions	Q4 2021

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