

# Supply Chain Management (SCM) BPS – Service Provider Compendium 2022

February 2022: Complimentary Abstract / Table of Contents



# Our research offerings

This report is included in the following research program(s):

## Procurement, Supply Chain Management (SCM) Services

- ▶ Application Services
- ▶ Banking and Financial Services Business Process
- ▶ Banking and Financial Services Information Technology
- ▶ Catalyst™
- ▶ Clinical Development Technology
- ▶ Cloud and Infrastructure
- ▶ Contingent Staffing
- ▶ Contingent Workforce Management
- ▶ Conversational AI
- ▶ Customer Experience Management Services
- ▶ Cybersecurity
- ▶ Data and Analytics
- ▶ Digital Adoption Platforms (DAP)
- ▶ Digital Engineering Services
- ▶ Digital Services
- ▶ Digital Workplace
- ▶ Engineering Services
- ▶ Enterprise Platform Services
- ▶ Finance and Accounting
- ▶ Financial Services Technology (FinTech)
- ▶ Global Business Services
- ▶ Healthcare Business Process
- ▶ Healthcare Information Technology
- ▶ Human Resources Outsourcing
- ▶ Insurance Business Process
- ▶ Insurance Information Technology
- ▶ Insurance Technology (InsurTech)
- ▶ Insurance Third-Party Administration (TPA) Services
- ▶ Intelligent Document Processing (IDP)
- ▶ Interactive Experience (IX) Services
- ▶ IT Services Executive Insights™
- ▶ Life Sciences Business Process
- ▶ Life Sciences Information Technology
- ▶ Locations Insider™
- ▶ Marketing Services
- ▶ Market Vista™
- ▶ Mortgage Operations
- ▶ Multi-country Payroll
- ▶ Network Services and 5G
- ▶ Outsourcing Excellence
- ▶ Pricing-as-a-Service
- ▶ Process Mining
- ▶ Procurement
- ▶ Recruitment
- ▶ Retirements Technologies
- ▶ Rewards and Recognition
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
- ▶ Talent Excellence ITS
- ▶ Technology Skills and Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)

If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at [info@everestgrp.com](mailto:info@everestgrp.com)

Learn more about our  
**custom research capabilities**

Benchmarking

Contract assessment

Peer analysis

Market intelligence

Tracking: providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

# Contents

For more information on this and other research published by Everest Group, please contact us:

**Shirley Hung**, Partner

**Vignesh Kannan**, Practice Director

**Amir Khan**, Senior Analyst

**Sonali Srivastava**, Senior Information Specialist

<b>1. Introduction and overview</b>	<b>5</b>
• Research methodology	6
• Everest Group SCM process map	7
• Background and scope of the research	10
<b>2. Everest Group SCM PEAK Matrix® characteristics</b>	<b>11</b>
• PEAK Matrix framework	12
• Everest Group PEAK Matrix for services	13
• Supply Chain Management (SCM) BPS PEAK Matrix	15
• Characteristics of Leaders, Major Contenders, and Aspirants	16
• 2022 Star Performers	17
• Service provider capability summary dashboard	19
<b>3. Enterprise sourcing considerations</b>	<b>23</b>
• Leaders	23
– Accenture	24
– Genpact	29
– TCS	35
• Major Contenders	41
– Capgemini	42
– Cognizant	47
– GEP	53

# Contents

• Major Contenders (continued)	
– HCL Technologies	58
– IBM	63
– Infosys	68
– OnProcess Technology	73
– Wipro	78
• Aspirants	84
– Corbus	85
– EXL	90
– Tech Mahindra	95
<b>4. Appendix</b>	<b>100</b>
• Glossary	101
• Research calendar	102

# Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01

### Robust definitions and frameworks

SCM pyramid, multi-process SCM definition, Total Value Equation (TVE), PEAK Matrix®, market maturity

02

### Primary sources of information

Annual contractual and operational RFIs, service provider briefings and buyer interviews, web-based surveys

03

### Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04

### Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and service providers

Proprietary contractual database of over 800 SCM contracts (updated annually)

Year-round tracking of 14+ SCM services providers

Large repository of existing research in SCM

Over 30 years of experience advising clients on strategic IT, business services, engineering services, and sourcing

Executive-level relationships with buyers, service providers, technology providers, and industry associations

## This report is based on multiple sources of key proprietary information

- Everest Group’s proprietary database of 800+ SCM contracts (updated annually)
- The database tracks the following elements of each SCM contract:
  - Buyer details including industry, size, and signing region
  - Contract details including Total Contract Value (TCV), Annualized Contract Value (ACV), term, start date, managed spend, 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
- Everest Group’s **proprietary database of operational capability of 14+ SCM services providers** (updated annually)
- The database tracks the following for each service provider:
 

– Revenue, managed spend, and number of FTEs	– Revenue split by region
– Number of clients	– Location and size of delivery centers
– Revenue split by geography, region, and industry	– Technology solutions developed
- **Service provider briefings**

– Vision and strategy	– Key strengths and improvement areas
– Annual performance and future outlook	– Emerging areas of investment
- **Buyer reference interviews, ongoing buyer surveys, and interactions**
  - Everest Group’s executive interviews and data collected from various buyers
  - The data contains detailed buyer perspectives about SCM contracts, specifically on:
    - ◆ Drivers for adopting SCM outsourcing and assessment of service providers’ performance
    - ◆ The level of buyer satisfaction and the underlying reasons

### Service providers assessed



Note: **The source of all content is Everest Group unless otherwise specified**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

## 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 services 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 services 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 services 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)



# This study provides detailed view of 14 SCM service providers offerings & capabilities as well as key strengths & limitations; below are four snapshots to illustrate the depth of report

Supply Chain Management (SCM) BPS – Service Provider Compendium 2022

### Service provider | SCM Overview

**Key leaders**

- XXX, Executive Vice President, Global Head of the Digital Supply Chain Operations
- XXX, Vice President Europe, Digital Supply Chain Operations
- XXX, Global Head of Digital Supply Chain Technology

**SCM services suite**

Service provider achieves operational excellence for its clients in engineering (XXX), and business services brands and end-user supply chain operations. Service provider transforms business sector-specific services, digital portfolio of solutions power operating models, and sustained execution, driving competitive advantage.

- **Planning excellence:** forecasting and sensing – demand management
- **Fulfillment reliability:** order management, delivery execution and performance management
- **Procurement operations:** category management, PR management
- **Supply chain data:** management, maintenance, visibility
- **Intelligent automation and analytics:** process mining, process optimization, chatbots/voicebots, and virtual agents
- Operational and commercial commitment to business continuity

Service provider's growth strategy focuses on helping its clients – enhancing customer experience, operational models, end-user supply chain, intelligent industry, and sustainability.

**Partnerships**

Technology partners include E2open, INTTRA, Llamasoft, SAP Platform for statistical computing, UiPath, BluePrism, Autotask, Infor Nexus, Celonis, Microsoft, Google, Amazon

**Number of clients:** XXX

Everest Group® Proprietary & Confidential. © 2022, Everest Global, Inc. | EGR-2022-22-R-4983

Supply Chain Management (SCM) BPS – Service Provider Compendium 2022

### Service provider | SCM Client portfolio

**Major SCM clients**  
Not disclosed

**Recently announced multi-process SCM engagements**

Time of signing	Client
2021	An American aviation and defense contractor
2021	A multinational electronics and electrical equipment manufacturer
2021	A manufacturer of medical devices
2021	A leader in connectivity and semiconductor solutions
2020	A leading pharma and life sciences company
2020	Unilever – LATAM and Indonesia
2020	An American worldwide clothing retailer

**SCM revenue mix by buyer geography (H1 2022)**

1 Large buyers (revenue > US\$5 billion), mid-market buyers (revenue < US\$5 billion)

Everest Group® Proprietary & Confidential. © 2022, Everest Global, Inc. | EGR-2022-22-R-4983

Supply Chain Management (SCM) BPS – Service Provider Compendium 2022

### Service provider | SCM Key delivery locations

Everest Group® Proprietary & Confidential. © 2022, Everest Global, Inc. | EGR-2022-22-R-4983

Supply Chain Management (SCM) BPS – Service Provider Compendium 2022

### Service provider | SCM BPS profile (page 4 of 4)

#### Technology solutions

Technology solutions	Solution 1	Solution 2	Solution 3	Solution 4	Solution 5	Solution 6	Solution 7	Solution 8
<b>Solution description</b>	It enables delivery of data-driven services, with business insights.	Suite of products for actionable intelligence: spend, inventory, logistics, and order insights.	Integration of 5G to support the capture, analysis, and visualization of real-time data.	Digital business-to-business front office enabling seamless and self-service customer and partner interaction.	Solution leveraging a set of individual applications, tackling most fundamental supply chain issues, deployed in just 12 weeks.	A suite of multifunctional, modular, versatile, and flexible tools for managing the production environment.	A single solution to measure and compare delivery center productivity in order to boost competitive advantage.	An application that enables the creation of end-to-end process automation with security standards at a high control level.
<b>Process scope</b>	End-to-end SCM processes, enabled for multiple sectors	Order management, spend analysis, inventory optimization, and logistics KPIs	VMS – make/manufacture digital twin	Order to deliver	Order management, demand and supply planning, and supply chain data management	Manufacturing and quality	Provides insights into process efficiency and evaluates standard times for activities	SCM processes
<b>Technology leveraged</b>	Cloud-based solutions; service provider proprietary technology	Cloud-based solutions	Cloud-based solutions service provider proprietary technology	service provider proprietary technology	Service provider proprietary technology	Service provider proprietary technology	service provider proprietary technology	Cross-platform, open language Document Object Model (DOM)
<b>Delivery model and pricing</b>	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed	Not disclosed

Everest Group® Proprietary & Confidential. © 2022, Everest Global, Inc. | EGR-2022-22-R-4983



# 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 2022 – Accelerating Value through Strategic PO Engagements	January 2022
<b>Supply Chain Management (SCM) BPS – Service Provider Compendium 2022</b>	<b>February 2022</b>
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-19 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 our published PO/SCM reports, please refer to our [website page](#).



Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global companies, service providers, and investors. Clients use our services to guide their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [www.everestgrp.com](http://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](http://everestgrp.com)

### Social Media

 [@EverestGroup](https://twitter.com/EverestGroup)

 [@Everest Group](https://www.linkedin.com/company/everestgrp)

 [@Everest Group](https://www.facebook.com/EverestGroup)

 [@Everest Group](https://www.youtube.com/EverestGroup)

### Blog

[everestgrp.com/blog](http://everestgrp.com/blog)

### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)

+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)

+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)

+44-207-129-1318

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)

+1-647-557-3475

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*