

Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023

June 2023: Complimentary Abstract / Table of Contents



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Contents

1. Introduction and overview	5
• Research methodology	6
• Everest Group SCM process map	7
• Introduction	10
2. Summary of the key messages	11
3. Everest Group SCM PEAK Matrix® characteristics	13
• PEAK Matrix framework	14
• Everest Group PEAK Matrix for services	15
• Supply Chain Management (SCM) BPS PEAK Matrix	17
• Characteristics of Leaders, Major Contenders, and Aspirants	18
• 2023 Star Performers	19
• Service provider capability summary dashboard	21
4. Enterprise sourcing considerations	24
• Leaders	24
– Accenture	25
– Genpact	27
– TCS	29
• Major Contenders	31
– Capgemini	32
– Cognizant	34

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Contents

• Major Contenders (continued)	
– GEP	36
– HCLTech	38
– IBM	40
– Infosys	42
– OnProcess Technology	44
– Tech Mahindra	46
– Wipro	48
• Aspirants	50
– Corbus	51
– EXL	53
5. Service provider landscape	55
• Provider landscape	56
• Overall service provider market share	57
• Market share by geography	58
• Market share by industry	59
• Buyer satisfaction	60
6. Appendix	61
• Glossary	62
• Research calendar	63

Introduction

Enterprises are grappling with various supply chain challenges, including evolving customer demands, planning limitations, and disruptions in production and distribution. Amidst recessionary headwinds and geopolitical tensions, enterprises are increasingly seeking third-party support to address supply chain challenges. Instead of solely relying on service providers for cost reduction, enterprises are now collaborating with them to add value across the entire supply chain through technology, process expertise, and specialized talent. To meet these evolving demands, service providers are enhancing their capabilities by cultivating domain-specific expertise, forging strategic technological and consulting partnerships, and developing state-of-the-art solutions to help enterprises navigate these challenges while reducing the environmental impact and achieving sustainability goals.

In this research, we present an assessment and detailed profiles of 14 SCM providers featured on the Supply Chain Management (SCM) BPS Services PEAK Matrix®. Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading supply chain service providers, client reference checks, and ongoing analysis of the SCM business process services market.

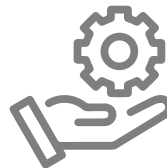
In this research, we analyze the global SCM BPS service provider landscape and assess 14 SCM service providers. We focus on:

- Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2023
- Service provider capability assessment
- Enterprise sourcing considerations

Scope of this report



Geography
Global



Providers
14



Services
Supply Chain
Management (SCM)

Overview and abbreviated summary of key messages

Everest Group PEAK Matrix® is a proprietary framework for the 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® 2023

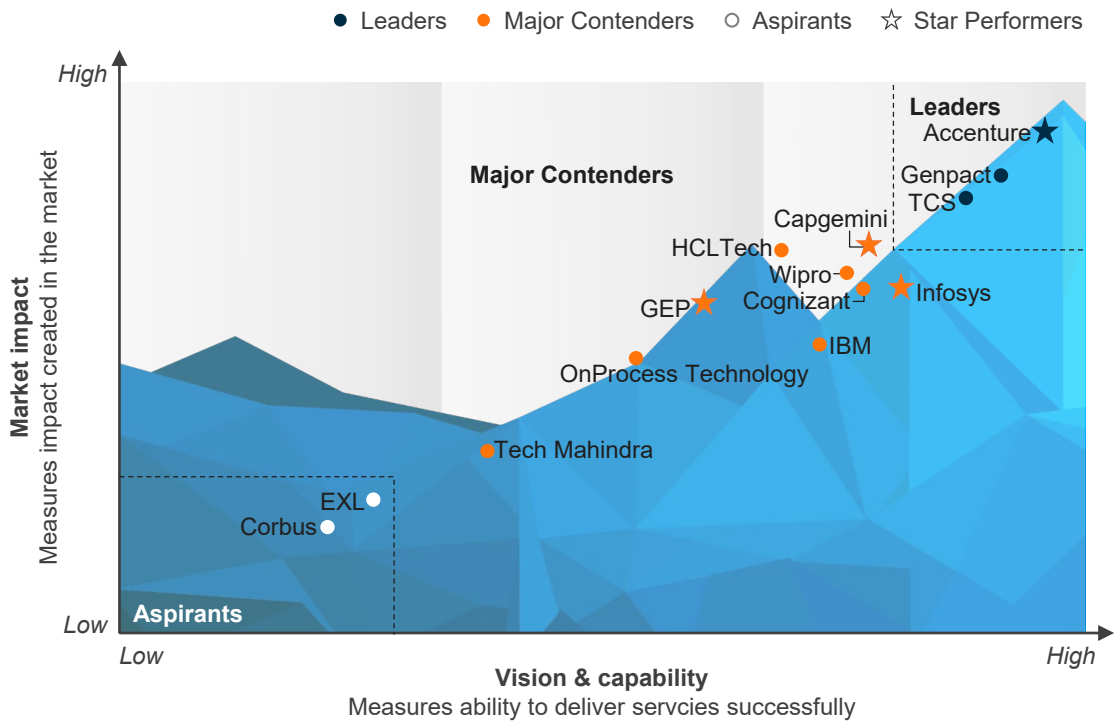
- Everest Group classifies 14 SCM service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants
 - **Leaders:** Accenture, Genpact, and TCS
 - **Major Contenders:** Capgemini, Cognizant, GEP, HCL, IBM, Infosys, OnProcess Technology, Tech Mahindra and Wipro
 - **Aspirants:** Corbus and EXL
- Based on the YoY movement of different service providers on the PEAK Matrix® Everest Group identified four service providers as the **2023 SCM Market Star Performers** – Accenture, GEP, Capgemini and Infosys

Key insights into SCM service provider landscape

- The top four providers contributed more than 50% of the market share in terms of ACV
- Accenture, Capgemini, and TCS are the market leaders across geographies
- Accenture, Capgemini, Genpact, and TCS consistently stand out as the top providers across major industries

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

Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023¹



¹ Assessments for Cognizant, EXL, and IBM excludes service provider inputs and are 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 (2023)

Capability assessment

Illustrative example

Measure of capability: ☐ Low ● High

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

Everest Group’s remarks on 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

- Provider 1 has further strengthened its integrated supply chain offerings through One Accenture by combining advisory, technology, industry, and operational expertise for strategic and technology-led supply chain transformation through partnerships and in-house solutions
- Provider 1 has a global presence with a good mix of offshore, onshore, and nearshore experts hired from diverse and global talent pools

Limitations

- Clients seeking cost savings solely through labor arbitrage or offshoring may not find Provider 1’s approach aligned to their needs
- While Provider 1 offers flexibility in pricing constructs, most of its current engagements continue to be on FTE-based pricing structures

Research calendar

Procurement and Supply Chain Management (SCM) Services

Published
 Planned
 Current release

Reports title	Release date
Procurement Outsourcing (PO) State of the Market Report 2022 – Accelerating Value through Strategic PO Engagements	January 2022
Supply Chain Management (SCM) BPS – Service Provider Compendium 2022	February 2022
Supply Chain Management (SCM) BPS State of the Market Report 2022 – Increasing Role of Third-party Providers in Reimagining Supply Chain Operations	April 2022
PO PEAK Matrix® Assessment with Service Provider Landscape 2022	September 2022
Procurement Outsourcing (PO) Service Provider Compendium 2022	November 2022
Leveraging Data Analytics to Build a Truly Connected and Collaborative Supply Chain	November 2022
Procurement Outsourcing (PO) State of the Market Report 2023	January 2023
Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023	June 2023
Driving Environmental Social and Governance (ESG) Initiatives through Procurement	Q2 2023
Evolution of the Procure to Pay Technology Landscape	Q2 2023
Supply Chain Management (SCM) BPS – Provider Profile Compendium 2023	Q3 2023
Procurement Outsourcing (PO) – Services PEAK Matrix® Assessment 2023	Q3 2023
Supply Chain Management (SCM) BPS State of the Market Report 2023	Q3 2023
Procurement Outsourcing (PO) – Provider Compendium 2023	Q3 2023
Procurement Outsourcing (PO) State of the Market 2023	Q4 2023

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