

Supply Chain Management (SCM) BPS – Provider Compendium 2023

August 2023: Complimentary Abstract / Table of Contents



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- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
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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 – PEAK Matrix® Assessment 2023](#). 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 assessment of relative market impact and vision & capability. Everest Group classifies 14 SCM service providers on the Everest Group PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants. Everest Group also identifies Star Performers based on the relative YoY improvement on the PEAK Matrix®. This report examines the Supply Chain Management (SCM) service provider landscape and provides a snapshot of their key strengths and limitations.

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

2023 SCM PEAK Matrix® and Star Performers

- 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, HCLTech, 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, Capgemini, GEP, and Infosys

Key insights across 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

The Supply Chain Management (SCM) BPS Provider Compendium 2023 report has 14 provider profiles

Supply Chain Management (SCM) BPS – Provider Compendium 2023

Provider 1 profile (page 1 of 5)

Overview

Key leaders

- Leader 1, Vice Chairman & CEO
- Leader 2, Executive Vice President, Head of Emerging Business
- Leader 3, Executive Vice President and Business Head, Americas
- Leader 4, Vice President, Business Head – Transport & Logistics
- Leader 5, SVP, Chief Digital Officer

SCM services suite

- Planning:** logistics planning and analytics, network planning,
- Deliver:** lead & quote management, order management & fulfillment management, fleet planning and route optimization, and load management
- After-sales:** claims management, warranty management, field management

Note: Numbers based on Everest Group estimates

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Supply Chain Management (SCM) BPS – Provider Compendium 2023

Provider 1 profile (page 2 of 5)

Overview

Partnerships
Partner 1, Partner 2, Partner 3, Partner 4, Partner 5

Number of clients: 5

Note: Numbers based on Everest Group estimates

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Supply Chain Management (SCM) BPS – Provider Compendium 2023

Provider 1 profile (page 3 of 5)

Client Portfolio

Major SCM clients
A global beauty retailer, a large trucking and logistics company, equipment rental company, a regional logistics management co chain solutions provider, a leading provider of lighting solutions.

Recently-announced multi-process SCM engagements

Time of signing	Client
May 2021	Client 1
N/A	Client 2

SCM revenue mix by buyer geography (Q3 2022)

1 Large buyers (revenue >US\$5 billion). Midsize buyers (revenue US\$1-5 billion). Note: Numbers based on Everest Group estimates

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Provider 1 profile (page 4 of 5)

Technology solutions

Technology solutions	Solution 1
Solution description	It is a solution that helps LTL carriers accurately capture all the e-accessorial charges and the revenue and profitability.
Process scope	<ul style="list-style-type: none"> Freight billing operations Rule-based data entry
Technology leveraged	<ul style="list-style-type: none"> Cloud-hosted Document management AI – extraction module Workflow solution Automation
Delivery model and pricing	<ul style="list-style-type: none"> AWS cloud Machine learning algorithm Analytics

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Provider 1 profile (page 5 of 5)

Technology solutions

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 follows a vertical-led approach by combining its industry expertise and analytics capabilities to offer supply chain services focused on delivery and after-sales services such as order management and fulfillment, claims management, and warranty management
- Its ability to handle downstream F&A along with order fulfillment in an integrated manner is one of its key strengths
- It has strengthened its capabilities by enhancing its partner network. In recent times:
 - It has acquired Clairvoyant, a global data, AI, and cloud services firm, to enhance its data engineering, AI/ML operations, and cloud expertise
- It is also one of the few providers that has extensive experience in serving clients in the transportation and logistics industry
 - Launched Rev-Lit™ – a digital revenue enhancement solution that helps Less Than Truckload (LTL) companies to capture destination accessorial charges
 - Freight Billing-as-a-Service is a solution focused on automating manual data entry operations from any bill format
- EXL leverages its strong analytics expertise to offer supply chain analytics services in areas such as fleet planning and route optimization, load balancing and scheduling, and demand forecasting

Limitations

- Provider 1 has limited consulting capabilities to support consulting-led SCM transformation engagements
- While Provider 1 has good order management and fulfillment capabilities, its ability and experience in serving clients in judgment-intensive supply chain processes such as SCM planning and field service management, is limited
- It has limited experience in:
 - Serving clients beyond North America and Europe, especially in emerging geographies such as Asia Pacific
 - Serving clients in industries such as CPG and retail, hi-tech and telecom, and healthcare and life sciences

Note: Numbers based on Everest Group estimates

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Research calendar

Procurement and Supply Chain Management (SCM) services

Published Planned Current release

Reports title	Release date
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
Sourcing for Sustainability: Driving Environmental, Social, and Governance (ESG) Initiatives through Procurement	June 2023
Supply Chain Management (SCM) BPS – Provider Compendium 2023	August 2023
Evolution of the Procure-to-Pay Technology Landscape	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
Logistics of the Future	Q3 2023
Procurement Outsourcing (PO) State of the Market 2023	Q4 2023

Note: [Click](#) to see a list of all our published Procurement and Supply Chain Management reports



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