ISG Provider Lens™

Supply Chain Services

Supply Chain IT Operation Services

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

ZONES™

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Report Author: Tarun Vaid

Digitally capable supply chain services supported by a consulting-led approach are vital for enterprise clients

In the backdrop of macroeconomic uncertainty and inflationary pressure, enterprises are seeking to achieve a sweet spot between the supply chain as a value creation lever and a cost center. They are eager to collaborate with service providers that can showcase proof of value in engagements that focus on supply chain transformation and resiliency. Over a third of the digital supply chain and connected supply chain services are being outsourced globally, and U.S. enterprises account for almost 50 percent of the outsourcing market. Leading supply chain service providers are actively building a robust collection of in-house IPs and accelerators to drive innovation and meet evolving customer demands.

In the next two to three years, supply chains will likely become more digitized and automated on a multi-enterprise ecosystem level. As market exchanges emerge, the sale of an item will automatically send demand signals to supplier firms located multiple levels upstream. ML-enhanced applications will be used to interpret the demand signal and tighten inventory control and work order release, ensuring business continuity.

Supply chain capabilities can be differentiated by scope and breadth; most service providers continuously innovate their service portfolio by strategically integrating supply chain-focused tools and accelerators to offer highly customized client solutions for large-scale outcomes. The supply chain operations reference model (SCOR) typically covers plan, source, make, deliver and return. With the rise in digital transformation and the increasing impact of macroeconomic factors, the scope of these parameters extends well beyond the typical template. ISG observes that supply chains now begin with in-depth consulting, covering business, technology and operations, followed by the product design phase. The design for manufacturability and sustainability must be devised upstream of the planning process. Providers must engage with

Data-driven supply chain insights and data orchestration comprise the most critical projects delivered.

customers during the product concept stage to ensure efficient supply chain designs before the first component is sourced. In addition, some providers and their supply chain service capabilities extend beyond return into reclaim and recycling to close the circular economy loop.

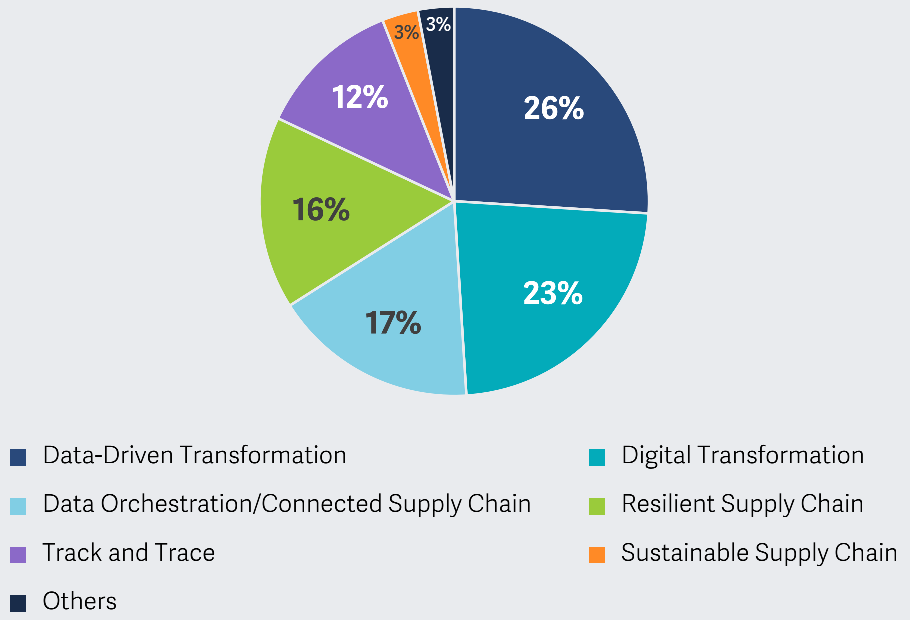
An exciting development highlighted by only two providers in the U.S. indicates that order management is now being integrated into inventory transactions and freight movements for improved on-time in- full (OTIF) performance, and logistics asset utilization is being optimized for load maximization and delivery slot scheduling. Robust supply chain services are merged with advanced capabilities to help design, deploy and operate the digital technologies required to develop new operating models that extract the value from complex supply networks. An in-depth discussion with providers revealed that less than 10 percent of clients opt for only one component of supply chain services, whereas more than 80 percent seek full-scale supply chain services for better outcomes.

In terms of depth, most assessed leaders offer the full stack, from supply chain design and strategy, operating model transformation consulting, process design and optimization, network modeling and optimization, technology strategy and implementation, to infrastructure support and BPS for both transactional and decision-based activities. As per our analysis this year, providers are focusing on the following key differentiators:

- End-to-end data engineering to analytics, including AI and ML: These have enabled providers to successfully address the rising demand for robust, connected supply chain chains for their clients.
- Cutting-edge IPs and industry-focused solutions: These enhance supply chain visibility and generative AI- and IoT-enabled track-and-trace capabilities.
- Thought leadership: Helps providers stay abreast of industry trends and emerging technologies. Providers also invest in R&D capabilities to support innovation and develop IPs to provide cutting-edge solutions.

Figure 1: Insights on the Use Cases Delivered by Providers

Total Percentage of Use Cases Delivered



N = 23 Source: ISG Provider Lens™ Supply Chain Research (N = number of providers assessed)

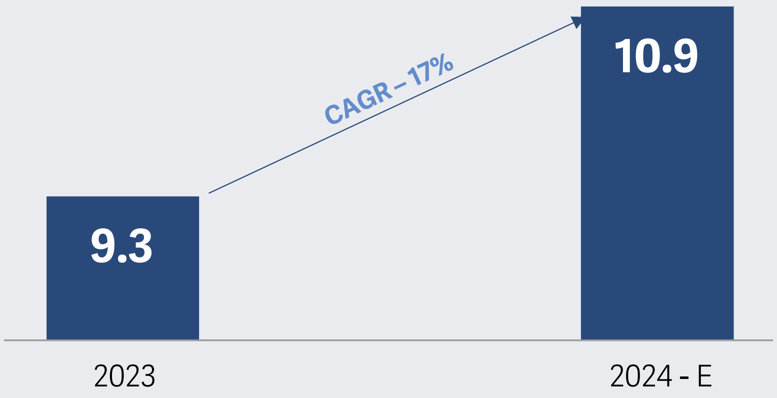
- Strategic alliances: Providers are partnering with premier technology providers, cloud hyperscalers and startups to gain access to best-in-class technologies and deliver comprehensive and tailored solutions.
- Experience-first, design-led approach: To bring seamlessness across enterprise and customer systems and deliver a holistic experience by combining data, content, workshops and business case developments.

Based on interviews with ISG consultants, we observe that although there are multiple dimensions to having competitive differentiation, the most critical elements that enterprise clients with a global and complex supply chain consider before provider selection include a consulting-led approach, a comprehensive service portfolio spanning consulting, industry- and domain-centric sustainable solutions, an experience in integrating digital technologies backed by SaaS-based solutions, and a strong innovation/investment road map focused on IPs, technologies, reskilling and upskilling of the workforce and growth strategy.

Over 200 use cases were assessed and analyzed this year. Nearly 70 percent of these use cases focused on data-driven insights for decision-making; digital transformation consulting with an emphasis on advanced analytics, AI and automation for enhanced visibility, optimized processes and business model transformation; and data orchestration for connected supply chain and enhanced end-to-end visibility. Ninety percent of sustainable supply chain use cases shared by providers were standalone rather than part of a more extensive supply chain service.

After interviewing 23 providers in this year's assessment and analyzing their shared revenue, client and growth data, along with other pureplay supply chain consultancies, management and business consultancies, cloud and technology services providers, and supply chain market, ISG has witnessed a growth of over 15 percent and valued the market size at $9.3 billion. ISG forecasts this market to witness decent growth in 2024, reaching a market size of almost $11 billion at a CAGR of 17 percent. The market will continue

Figure 2: Supply Chain Services Market Size ($ Billion)



N = 23 Source: ISG Provider Lens™ Supply Chain Research (N = number of providers assessed) witnessing a higher growth rate due to ongoing trends around the digital transformation of supply chains, rise in the demand for sustainable and resilient supply chains and increased outsourcing of supply chain services due to talent shortage.

The average revenue growth of most providers ranges between 12 and 15 percent, making supply chain services one of the fastest-growing service lines.

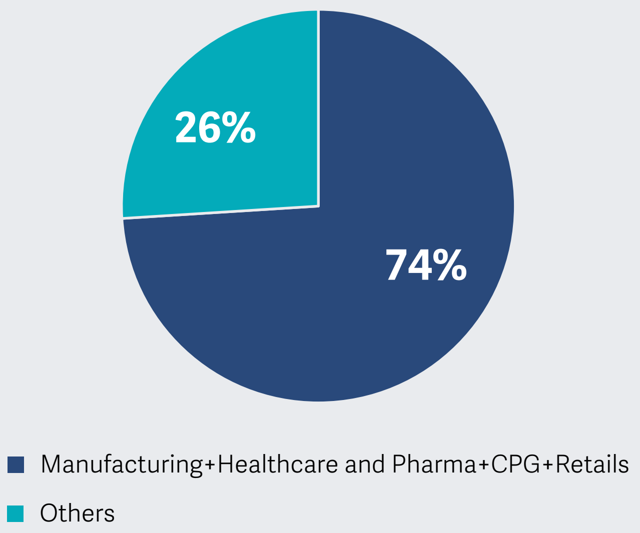
On average, Leaders have reported that nearly 80 percent of their end-customers constitute large enterprises with global and complex supply chains, whereas, for all assessed providers, this client segment is nearly 55 percent. Eighty percent of these clients seek supply chain IT operations and supply chain advisory and consulting services. The client base has increased by 18 percent YoY, with the average number of clients in the U.S. being 580. An analysis of all use cases shared showed that the ACVs of less than 15 percent of the reported engagements were valued at higher than $10 billion.

To grow in this highly competitive supply chain market, providers strive to offer industry-specific solutions with digital and cognitive capabilities to clients and target their sweet spot to differentiate themselves. As shown in the figure above, most use cases shared by providers focused on manufacturing, healthcare, retail and CPG industries. Energy and utilities also registered good traction and are forecasted to witness improved supply chain service adoption in the next 24-36 months.

ISG observes the following major supply chain trends that are dynamically shaping up the service providers' efforts, strategies and investments to remain competitive and relevant to the market:

Resilient supply chain: More than 90 percent of service providers have mentioned offering a resilient supply chain as their top priority. Almost every enterprise client strongly emphasizes building resilient supply chains to adapt efficiently to the changing business requirements, optimize production with supply chain planning, diversify supplier and manufacturing partners, implement capacity

Figure 3: Client Split by Industries



N = 23 Source: ISG Provider Lens™ Supply Chain Research and inventory buffer, and respond to incidents effectively and quickly. Providers focus on enhancing flexibility and agility and reducing risks with a more dynamic control tower and automation capabilities for better control and visibility.

Digital transformation of the supply chain: There has been a significant uptake of digital technologies such as analytics, automation, AI and the IoT to drive the digital transformation of enterprise clients' supply chain operations to accelerate performance, agility and resilience and mitigate risks. Providers now have multiyear, integrated digital transformation road maps that cater to short-term improvements and strategic long-term visions. Providers with strong digital transformation consulting capabilities coupled with proven experience in integrating digital technologies have seen higher demand and growth.

Intelligent supply chain: Enterprise clients prioritize data analytics and intelligence when developing a supply chain optimization strategy. Clients are recognizing the value of data and analytics in supply chain operations and are actively using advanced analytics and predictive modeling to gain actionable insights and optimize demand forecasting, inventory management, and supply chain planning. Data-driven decision-making is becoming crucial for enhanced efficiency and effectiveness. Providers are, thus, improving their data and analytics capabilities by adding more function- and industry-specific analytical tools and accelerators, with predictive analytics being a critical analytical component.

Digital thread is now mainstream: Digital thread assists enterprise clients in fostering connectivity, transparency and communication among supply chain operators and ensures responsiveness and adaptability to frequent supply chain disruptions. Digital technologies such as IoT, ML and digital twins create a holistic digital thread extending to suppliers as well as customers. They help unify data and empower agile decision-making and proactive issue resolution, resulting in a highly connected supply chain with reduced waste and higher revenue. They also strengthen supply chains, making businesses better prepared for uncertainties.

Supply chain risk management: To mitigate disruptions and create robust supply chain networks, clients are investing in risk management strategies. They are adopting technologies such as predictive analytics and scenario planning to proactively identify and mitigate potential hazards. Robust governance, controls and compliance, constant risk monitoring, geopolitical uncertainties, globalization and regulatory challenges are major factors that dynamically shape the need for robust risk management solutions.

Generative AI and sustainability supply chain services are also expected to gain importance in supply chain operations in the next 18-24 months, with many projects now moving from the planning to the POC phase. This space has garnered a significant increase in investment from enterprise clients and service providers in the U.S., though sustainability services are being offered as standalone services instead of as part of large supply chain transformation services. It would be interesting to see if the slow adoption of sustainability among U.S. enterprises is due to the providers' strategy to offer it as an independent offering or because of enterprises that still have sustainability as part of their long-term strategy with certain function-specific POCs being explored.

Most service providers have reported that the below-mentioned decision-makers play key roles in influencing the buying decision of a complex supply chain project.

Chief supply chain officers (CSCOs): CSCO is the highest-ranking executive that plays the most important role in supply chain strategy and operations. CSCOs assess a project's viability, analyze its benefits and hazards, and offer strategic guidance. They prefer providers offering value enablers such as supply chain and digital CoEs, best-in-class talent and robust supply chain domain expertise.

Supply chain operation directors: They are directly responsible for the day-to-day operations of the supply chain. They provide insights into the operating challenges and requirements, assess the project's impact on current operations and play a key role in evaluating the operational benefits of the proposed solution. Supply chain operation directors and CSCOs finalize the extent of transformation and technologies that need prior investments.

Chief information officers (CIOs): They oversee a company's technological direction, landscape and operations. To assess transformation readiness, they evaluate a supply chain project's technical viability and compatibility with current systems and technologies. They also examine the business use cases, a road map for technology, technology evaluation, data security, scalability and longevity of the suggested solution.

Players such as Accenture, TCS and Infosys dominate the U.S. supply chain service market. They continue to adopt innovation-focused approaches to enhance their service capabilities. They have strong innovation road maps, well-planned vision, regional strategies and robust industry-specific and process-specific tools and accelerators that support and deliver complex supply chain transformation for large enterprises. Other providers, such as Cognizant, Deloitte, Genpact, HCLTech, IBM and Tech Mahindra, are working toward challenging the top three players. Companies such as EXL, LTIMindtree, Zones and Zensar Technologies have promising supply chain service portfolios and highly practical and result-oriented tools.

Talent shortage continues to cloud the supply chain service market's growth; client projects require skilled employees with the necessary technology certifications and a strong understanding of traditional supply chain domain knowledge. The market is now undergoing a severe talent war, and to mitigate the issue, many providers implemented large-scale training and certification programs in the last 9-12 months, prioritizing staff development in their overall growth strategy. The presence of local certified and experienced professionals acts as a differentiator. It also indicates the extent of their expertise in managing complexities, service delivery and client proximity. Local and tier-2 providers have taken a major hit as several global players are managing large projects, recruiting extensively and drying up the talent pool. For clients, significant challenges include the high average cost of implementation, long project implementation duration, data privacy issues, complexity and uncertainty about the best possible transformation path, unpredictable technology cycles and refresh, coupled with economic uncertainty.

These are exciting times for the supply chain and global manufacturers. While it is a known fact that the dynamics of the global supply chain are dramatically changing, the advent of advanced technologies will play a crucial role in enabling enterprises to meet exponential operational efficiency and optimization.

In the currently dynamic market, providers face the significant challenge of continuously innovating their offerings. Many providers focus on developing niche solutions, IPs and platform-centric approaches to offer robust and highly customized services.

Provider Positioning

Page 1 of 3

	Supply Chain Advisory and Consulting Services	Supply Chain IT Operation Services	Supply Chain BPO Services
Accenture	Leader	Leader	Leader
Atos	Product Challenger	Product Challenger	Not In
Birlasoft	Contender	Product Challenger	Not In
Capgemini	Product Challenger	Leader	Product Challenger
Chainalytics	Market Challenger	Market Challenger	Not In
Clarkston Consulting	Contender	Not In	Not In
Cognizant	Product Challenger	Leader	Market Challenger
Deloitte	Leader	Leader	Not In
EPAM Systems	Not In	Contender	Not In
EXL	Not In	Not In	Rising Star ★
EY	Leader	Product Challenger	Not In

Provider Positioning

Page 2 of 3

	Supply Chain Advisory and Consulting Services	Supply Chain IT Operation Services	Supply Chain BPO Services
Genpact	Leader	Leader	Leader
GEP	Product Challenger	Product Challenger	Product Challenger
Group50	Contender	Not In	Not In
HCLTech	Leader	Leader	Leader
Hitachi Vantara	Product Challenger	Product Challenger	Not In
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Leader
Invensis	Not In	Not In	Contender
KPMG	Market Challenger	Market Challenger	Not In
LTIMindtree	Product Challenger	Rising Star ★	Not In
Maine Pointe	Product Challenger	Not In	Not In

Provider Positioning

Page 3 of 3

	Supply Chain Advisory and Consulting Services	Supply Chain IT Operation Services	Supply Chain BPO Services
Mphasis	Not In	Contender	Not In
Nexdigm	Not In	Contender	Not In
OnProcess Technology	Not In	Product Challenger	Not In
PwC	Product Challenger	Market Challenger	Not In
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Leader	Product Challenger
UST	Product Challenger	Product Challenger	Contender
Wipro	Product Challenger	Product Challenger	Product Challenger
WNS	Not In	Not In	Product Challenger
Zensar Technologies	Rising Star ★	Product Challenger	Product Challenger
Zones	Not In	Rising Star ★	Not In

Key focus areas for Supply Chain Services 2023

- **Supply Chain Advisory and Consulting Services**
- **Supply Chain IT Operation Services**
- **Supply Chain BPO Services**

Simplified Illustration Source: ISG 2023

Definition

Supply chain was one of the most disrupted segments by the pandemic. The complexity involved in supply chains emphasizes the increased shift to a globally connected and highly interdependent world. With enterprises expanding their technology and infrastructure footprints as a result of increased digitalization, organizations must embrace the sustainability goals for a greener and more livable planet.

In recent years, many companies have been working on achieving net-zero carbon emissions or reducing their carbon footprints. Those focusing on addressing climate-change-related challenges find it important to deploy analytics using connected, centralized and reliable data. Integrating AI and ML into supply chain services allows for more accurate predictions and real-time innovation opportunities.

The ISG Provider Lens™ Supply Chain Services study is focused on supply chain services and capabilities such as supply chain consulting, implementation and integration, managed services, digital transformation, and BPO, in addition to achieving ESG goals for clients.

The providers should leverage a comprehensive framework to use technologies such as IoT, ML, AI, predictive analytics, automation, cloud, mobile app, blockchain and data orchestration. The purpose is to enable clients to optimize their entire supply chain ecosystem to balance their business risk profiles, demand and supply management, operational revamp, continuous innovation and deliver on net carbon neutrality.

Today, supply chain systems require content-rich real-time collaborations and continuous analysis of what-if scenarios and trade-offs between competing metrics and objectives to take data-driven action for any unplanned scenarios (internal and external factors).

Scope of the Report

In this ISG Provider Lens™ quadrant report, ISG covers the following three quadrants for services/solutions: Supply Chain Advisory and Consulting Services, Supply Chain IT Operation Services and Supply Chain BPO Services.

This ISG Provider Lens™ study offers IT decision makers the following:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on regional markets such as the U.S. and Brazil

Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptionsare possible).

Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Supply Chain IT Operation Services

Who Should Read This Section

This quadrant is relevant to enterprises in the U.S. for evaluating supply chain IT operation service providers. It assesses their expertise in providing comprehensive supply chain IT operation services across functional areas such as planning, making and manufacturing, supply chain execution and fulfillment services.

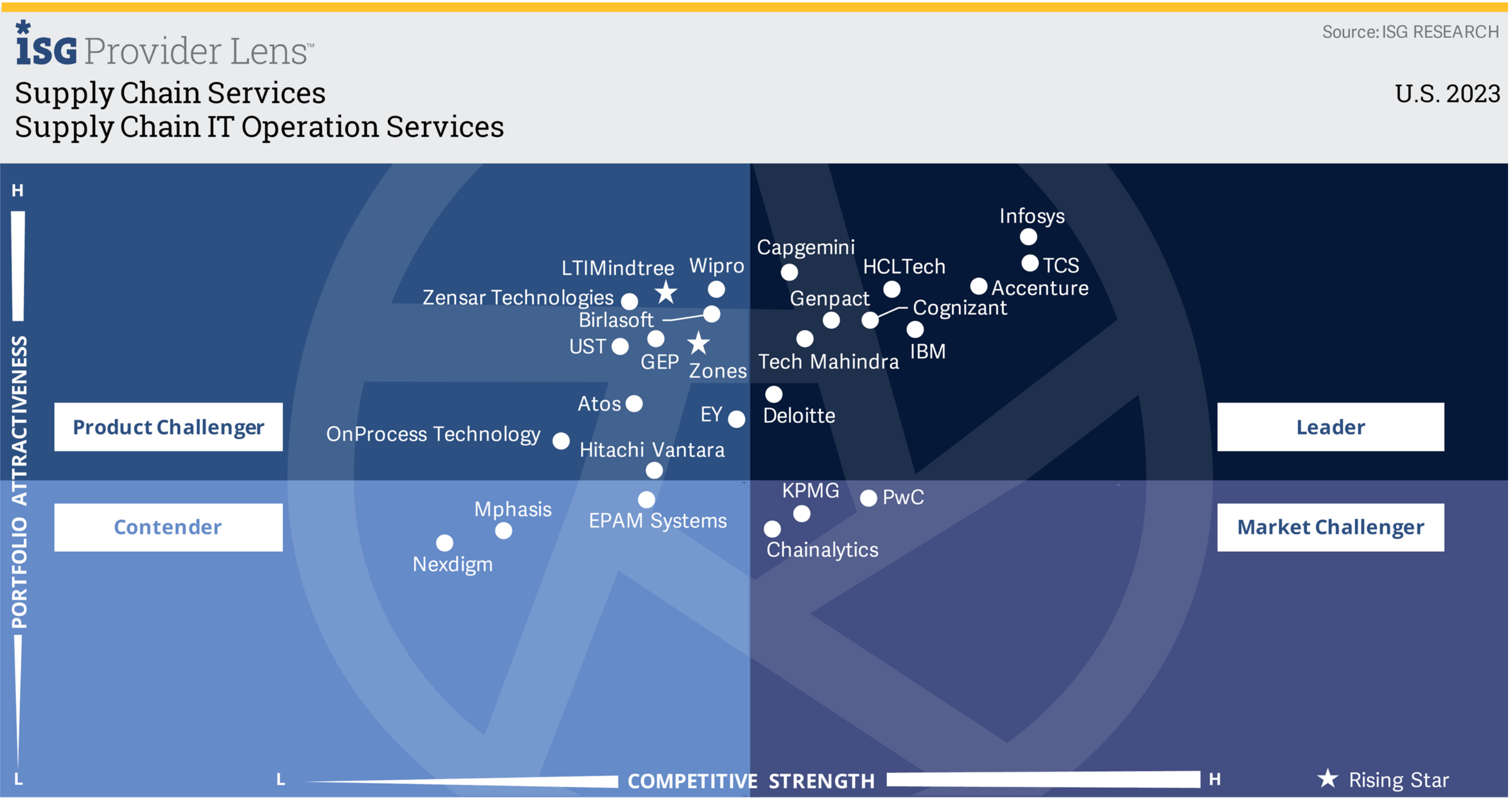
In this quadrant, ISG defines the current positioning of supply chain IT operation service providers, offering a comprehensive overview of the competitive market landscape.

Enterprises opt for supply chain digital transformation initiatives to achieve end-to-end outcomes rather than gaining functional efficiencies in silos. The increasing availability of data and advanced analytics tools enable enterprises to make data-driven decisions. They leverage advanced analytics, AI, ML, IoT and predictive modeling to optimize inventory, improve demand forecasting, enhance supplier performance and manage warehouse and logistics. There is an increased focus on achieving end-to-end visibility and resilience as most enterprises diversify their supplier base and build robust supply chain networks. Enterprises increasingly seek digital transformation initiatives to optimize their supply chain operations. These initiatives largely focus on achieving business outcomes rather than supply chain process metrics. This ensures supply chain transformation efforts deliver strategic value, allow enterprises to demonstrate the business and customer impact of their transformation initiatives and justify the technology investment in transforming supply chains. Enterprises also increasingly recognize the need to integrate sustainable practices into their supply chain operations to reduce environmental impact.

Strategy professionals should read this report to understand how providers build and deliver industry-specific solutions tailored to solve unique and complex supply chain challenges.

Supply chain and logistics professionals should read this report to understand the providers' capabilities and expertise in supply chain-related systems, services and technologies.

Technology professionals should read this report to understand how providers leverage technological advancements and oversee process and technology integration to ensure seamless supply chains.



This quadrant assesses providers' ability to offer a comprehensive set of supply chain services, strategically integrating **industry-specific tools, IPs and accelerators, and digital technologies** to address **complex and large-scale** supply chain transformation requirements.

Tarun Vaid

Definition

This quadrant assesses providers on their offerings for supply chain planning, make-and-manufacture capabilities and supply chain execution and fulfillment services. Supply chain planning and forecasting services offer end-to-end visibility and control over the entire supply chain planning process. The processes include demand planning and forecasting, sales and operation planning (S&OP), production planning, network planning, inventory planning, designing and visibility and collaboration. This set of services helps the enterprise achieve operational excellence, be responsive to changes, drive revenue, offer a better experience and provide a platform for effective execution.

Supply chain execution and fulfillment services offer visibility and assistance in moving goods from production, storage and transportation to delivery centers and destinations. Supply chain execution assists enterprises with end-to-end visibility and collaboration while capturing data and offering real-time insights.

Logistics management, warehouse management, inventory management, transportation management, supply chain control tower, route optimization and network modeling are some of the major capabilities. Track-and-trace technologies such as blockchain and IoT, coupled with analytics, automation, mobile, cloud, AI and ML and others are playing pivotal roles in offering connected supply chains.

Finally, the quadrant will examine the capability of providers based on their ability to offer industry-specific tools, IPs and accelerators; experience in delivering connected supply chain, sustainability and real-time insights that allow partners to quickly adapt to supply or demand changes to make improvements for the future and assist clients in delivering superior customer experience and advising them on the latest trends.

Eligibility Criteria

1. Expertise in offering a broad set of **supply chain operation** services covering all major and mature capabilities
2. **Use of reference models, result-oriented tools and frameworks and best practices**
3. Ability to **design technical solutions** per reference architecture, aligning with the described needs of the business
4. Demonstrate ability to manage data systematically and **ensure data orchestration** for continuous information flow
5. Breadth of application management services, **functionality upgrades and custom requirements**
6. **Experienced and qualified professionals** to support end-to-end implementation and business- and industry-specific consulting
7. **Strong knowledge of regional and local regulatory requirements**
8. **Must demonstrate use cases and work delivered for clients** in the study region

Observations

Service providers have a dedicated approach to creating niche solutions and IPs that can address particular business challenges in the digital supply chain space. As part of their supply chain services, nearly 90 percent of providers offer tools and accelerators integrated with AI, ML, data analytics, predictive analytics, automation, IoT and blockchain to derive insights, drive automation and enable real-time supply chain decision-making. In a very interesting development, providers have increased their focus on offering process mining tools, and a majority of providers have strategically enhanced their alliance with vendors like Celonis to offer comprehensive data and process mining solutions. Data conversion and validation tools for data migration in the cloud now have an increased active user base. Providers are also focusing on building a robust partner ecosystem that includes cloud hyperscalers, commercial off-the-shelf (COTS) package partners and technology providers. Partners such as IBM, SAP, Oracle, Microsoft, Blue Yonder, Kinaxis and o9 have enabled providers to collaborate and expand in the market, providing clients with comprehensive and innovative digital supply chain solutions. Partnerships among providers have increased to offer comprehensive last-mile delivery solutions, inventory and logistics optimization and data mining.

Some leaders have showcased an interesting design-thinking approach to transform enterprises and make them more customer-centric. Providers encourage clients to deeply understand customer needs and pain points and help prioritize development opportunities. By cultivating a customer-centric mindset across operations, enterprises are now aligning their supply chain strategies and operations to better serve their customers.

On average, supply chain IT operation services account for nearly 60 percent of the supply chain revenue, with a YoY increase of 18 percent. As reported by providers, nearly 55 percent of their client base seek robust supply chain IT operation services.

From the 33 companies assessed for this study, 27 have qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture's strong thought leadership, strategic partnerships and joint R&D with partners to develop innovative supply chain solutions, a wide range of home-grown toolkits, and ready-to-deploy solutions enhance its expertise and delivery capabilities.

Capgemini

Capgemini's Digital Supply Chain is a robust service that combines business process management (BPM) from planning to delivery with cloud-based solutions, including analytics and insights, real-time visibility, maturity assessments, digital transformation and change management.

cognizant

Cognizant has a well-focused go-to-market strategy with its technology partners and continues to elevate this partnership to jointly position supply chain expertise to clients. It provides comprehensive solutions to disruptive challenges affecting supply chains.

Deloitte

Deloitte's supply chain and network operations service assists clients to respond to disruption with agility, explore the next big opportunity with a hyperconnected network and deliver enriched business value.

genpact

Genpact's enabling transformation alignment (ETA) framework serves as a foundation for aligning the strategy, processes and tools required for effective planning and execution. It also uses organically developed tools and IPs for supply chain transformation.

HCLTech

HCLTech is committed to revolutionizing supply chain operations for clients. It applies its strong product, domain and digital expertise and uses data analytics and advanced technologies to make supply chains more agile, resilient and adaptive.

IBM

By harnessing technology and data-driven insights, **IBM** empowers clients to achieve intelligent supply chain management (SCM), fostering visibility, transparency and resilience throughout the entire supply chain network.

Infosys

Infosys' Digital Supply Chain Practice offers clients end-to-end supply chain operation services integrated with advanced capabilities to optimize supply chain processes.

TCS TATA CONSULTANCY SERVICES

TCS supply chain services cover end-to-end value chains that enable enterprises to transform planning, sourcing, manufacturing, distribution, shipments, and returns across industries.

Tech Mahindra

Emphasizing technology's transformative potential, proof of value (POV)-led and innovation-driven approach with ideation hubs and innovation labs, **Tech Mahindra's** robust suite of offerings empowers businesses to optimize their supply chain processes and achieve operational excellence.

LTIMindtree

LTIMindtree (Rising Star) has a dedicated supply chain center of excellence focused on the ideation and development of cutting-edge solutions for supply chain challenges and offers innovative end-to-end supply chain services for clients in the U.S.

Zones

Zones (Rising Star) has digitally focused supply chain services at its core. Its strong focus on innovation and advancements makes it a Rising Star in the U.S. Supply Chain IT Operation Services quadrant.

Rising Star

"Zones offers digitally capable supply chain services with a strong focus on innovation and advancements, making it a Rising Star in the U.S. Supply Chain IT Operation Services quadrant."

Tarun Vaid

Zones

Overview

Zones is a global service and solutions provider founded in 1986 and headquartered in Auburn, WA, U.S. It serves clients in over 100 countries using a services-plus-reseller business model, with retail, energy, and telecom and media as key verticals for supply chain services. The company employs more than 2,700 staff globally. Its global reach allows it to serve organizations worldwide, regardless of location, and provide customized supply chain solutions, leveraging extensive network and industry insights. Zones' Global Supply Chain as a Service (GSCaaS) empowers organizations to focus on their core business while it handles their IT supply chain needs.

Strengths

Customer-first approach: Zones' global reach and delivery model allows it to strategically serve all clients by offering similar experiences. Regardless of the location, it provides customized supply chain solutions, leveraging its extensive partner networks and industry insights. It aligns its strategies with clients' objectives and collaborates with them to enhance supply chain visibility and optimize processes, maximizing operational efficiency.

Supply chain offering and road map: Zones, through its GSCaaS practice, offers a broad portfolio of supply chain services spanning logistics, fulfillment, delivery and innovative solutions. Its IT solutions are executed within the quality and environmental management system governance model. It uses its in-depth understanding of the supply chain landscape to effectively address enterprise needs for an optimized end-to-end supply chain. It also drives advancements, investments in digital technologies and best practices, and strategic initiatives focused on digital transformation, sustainability and risk management.

Robust partner ecosystem: Zones has a strong network with over 5,000 partners, including Hitachi, VMware and ServiceNow, as well as hyperscalers such as Microsoft Azure, AWS and Google Cloud. It works with partners to co-develop solutions and go-to-market strategies to deliver next-gen transformation services.

Caution

Although Zones is well-positioned to meet clients' requirements in supply chain fulfillment and execution areas, it must show more progress in the supply chain planning space.

Appendix

The ISG Provider Lens™ 2023 – Supply Chain Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

Lead Author:
Tarun Vaid

Editor:
Upasana Hembram

Research Analyst:
Bhuvaneshwari Mohan

Data Analyst:
Sarida Khatun

Quality & Consistency Advisors:
Bill Huber, Sunder Pillai and Sush Apshankar

Project Manager:
Greeshma A C

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of July 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Supply Chain Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Analyst

Tarun Vaid
Senior Lead Analyst

Tarun Vaid brings nearly 13 years of experience in technology research and advisory. At ISG, Tarun is a Senior Lead Analyst for Digital Business Enablement and ESG, SAP Ecosystem and Supply Chain Services studies for U.S. geography.' Tarun is majorly focused on the latest technology trends and is responsible for providing actionable insights through research and analysis about the market and provider's profile. Tarun also keeps a keen interest in the software market, the impact of AI, automation and analytics and brings in a strong background in this segment.

Research Analyst

Bhuvaneshwari Mohan
Senior Research Analyst

Bhuvaneshwari is a Senior Research Analyst at ISG responsible for supporting and co-authoring Provider Lens™ studies on Banking, Cybersecurity, Supply Chain, ESG and Digital Transformation. She supports the lead analysts in the research process, authors the global summary report and develops content from an enterprise perspective. Her core areas of expertise lie in Cybersecurity, Cloud & Data transformation, AI/ML, Blockchain, IoT, Intelligent Automation and Experience Engineering.

She has seven years of hands-on experience and has delivered insightful reports across verticals. She is a versatile research professional having experience in Competitive Analysis, Social Media Analytics, Glassdoor Analysis and Talent Intelligence. Prior to ISG, she held research positions with IT & Digital Service Providers and was predominantly part of Sales Enablement teams.

IPL Product Owner

Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this [webpage.]

ISG Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

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