iSG Provider Lens™

Supply Chain Services

A report comparing provider strengths and differentiators to enable enterprises make sourcing decisions.

BROCHURE | **MAY 2024** | **U.S., Brazil and Europe**

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Supply chains face continuous disruptions such as political unrest, trade wars, rising interest rates and raw material shortages, which are short-term challenges compared with those faced during the pandemic. There has been a dramatic change in mindset — supply chains are not just looked at as cost centers or risk sources but as drivers of innovation and competitive advantage. Also, outcomes are increasingly focused on optimization and productivity, with cost as the fulcrum. Technological innovation, consulting, data and expertise in supply chain domain are the core of supply chain services; providers are focusing on innovations to assist clients in establishing future-ready supply chains that are intelligent, resilient and sustainable.

The ISG Provider Lens™ Supply Chain Services study focuses on supply chain consulting, technology implementation and integration, managed services, digital technologies, BPO services and circular supply chain service capabilities. Providers are expected to leverage technologies such as IoT, blockchain, AI, predictive analytics and automation, and prioritize cybersecurity and data orchestration, enabling supply chain optimization to balance business risks, demand and supply management and continuous innovation and achieve net carbon neutrality.
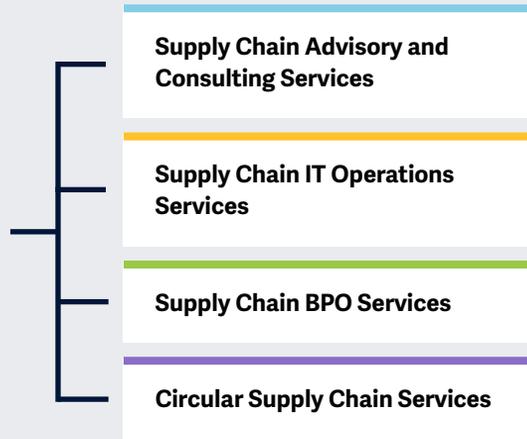
Providers must answer the following clients' concerns:

- How do you support clients that differ in digital maturity levels and challenges?
- How will digital technologies make supply chains resilient and future-ready?
- Do industry-specific solutions and next-generation technologies address issues related to complexity, transformation period and RoI?
- Do providers offer consulting tools and services to address internal and external issues?

The key focus areas of the Supply Chain Services report for 2024.

Simplified Illustration Source: ISG 2024

Supply Chain Advisory and Consulting Services

Supply Chain IT Operations Services

Supply Chain BPO Services

Circular Supply Chain Services

Scope of the report

The ISG Provider Lens™ Supply Chain Services study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on the U.S. and Brazil markets

The study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from this study to evaluate their current vendor relationships and potential engagements.

Supply Chain Advisory and Consulting Services

Definition

This quadrant assesses providers offering supply chain advisory and consulting services that include niche transformation and business operations solutions to aid enterprises in designing supply chain strategies in alignment with their business strategies. The services encompass reengineering, network optimization, risk management, digital transformation, circular supply chain, data-driven insights and process optimization.

They address complex issues, identify growth opportunities and strengthen operations by building future-ready supply chains that are resilient, agile and sustainable. The dramatic shift in focus of the supply chain function from cost optimization to process optimization and improved productivity, in the last 12 months, has resulted in a significant uptake of advisory and consulting services for network design and optimization, change management, sustainability, risk management, data governance and digital transformation.

The services here help enterprises build new supply chain models or revamp current ones by exploring market opportunities. Providers are expected to offer a portfolio of tools as a buttress for their consulting capabilities on assessment, gap analysis and transformation readiness check, and build use cases to deliver improved business value. Their comprehensive consulting services cover planning, execution, procurement and after-sales to establish a connected and transparent supply chain environment that can adapt to the scope and pace of generational business, and technological, economic and political changes. Providers continually integrate new and emerging technologies with strategic insights and creative problem-solving skills.

Eligibility Criteria

1. Possess supply chain and business strategy development and adaptation capabilities

2. **Use reference models, assessment framework templates and best practices** to drive supply chain initiatives

3. **Have digital business transformation** competencies focused on offering a connected and sustainable supply chain

4. Can **design service transformation and strategic roadmap development**, in tandem with regional and local regulations, to create business use cases

5. **Experience in change management and risk management**

6. **Have a strong understanding and proven experience with digital technologies** such as advanced analytics, AI, ML, IoT, blockchain and digital twins

7. Demonstrate use cases delivered in the regions covered in the study

8. Have an established team of consultants with both technology and supply chain domain expertise

Supply Chain IT Operations Services

Definition

This quadrant assesses providers that offer technology solutions and implementation services for supply chain management. Clients seeking services in this space are on the lookout for providers that offer new tools and methods and have deep domain and functional expertise to cover planning, purchasing, making or manufacturing, execution and after-sales support, and establish optimized, end-to-end visible and sustainable supply chains. They should also have experience in production and capacity planning, logistics management and inventory and order management.

Providers here have expertise in implementation that includes integrating technologies such as blockchain, IoT, automation and AI and delivering end-to-end visibility through strong track and trace capabilities. They are also expected to have strong industry-specific knowledge together with the ability to provide end-to-end application support with a focus on AIOps.

In addition, the providers featured here are expected to have the ability to offer the following: industry-specific tools, intellectual property assets and accelerators; experience in delivering connected and orchestrated supply chains; and real-time insights that allow clients to quickly adapt to supply/demand changes for the future. These would also assist clients in delivering superior CX and accruing information on the latest trends. The emphasis on next-generation technologies, risk management, innovation roadmaps and a partner ecosystem would be essential for provider growth, enabling them to win an increasing number of new deals.

Eligibility Criteria

1. Have the expertise to offer a plethora of supply chain operation service covering end-to-end supply chain operations

2. **Use reference models, tools and frameworks, and best practices**

3. Have the ability to **design technical solutions** in accordance with reference architecture, clients' digital maturity and business goals, and industry challenges

4. Experience in **data orchestration** for connected supply chains

5. Offer a breadth of application management services, **functionality upgrades and custom requirements**

6. **Have experienced and qualified professionals** to support end-to-end implementation and business- and industry-specific nuances

7. **Demonstrate use cases delivered in the regions covered** in the study

8. **Have use cases on blockchain, IoT, digital twin, AI, automation and analytic**s

9. **Show a strong service innovation roadmap**

Supply Chain BPO Services

Definition

This quadrant assesses providers with business process outsourcing (BPO) and management capabilities across the supply chain, encompassing design, plan, source, make, move, return and enable processes.

Although cost is the heart of outsourcing deals, the biggest development noticed in the last 12 months is a dramatic shift in priority to optimization and enhanced productivity. This quadrant examines the ability of providers to transform businesses, reduce operational costs, improve service levels, manage and sustain change, and integrate digital technologies. They must also prioritize and show capabilities in managing orders, incidents, field services, risks and compliances, warranty, customer service, claims, suppliers, category and contract management. In the current market environment, procurement and after-sales capabilities have the largest number of BPO use cases.

Technologies such as analytics, automation, AI, chatbots, RPA, predictive analytics, sentiment analysis and NLP, together with delivery models such as data-as-service, risk management-as-a-service and compliance-as-a-service, and result-oriented outsourcing tools and frameworks are being closely evaluated in this year's assessment. The intelligent frameworks work in tandem with evolving business process requirements, from design to delivery, and leverage advanced digital solutions to optimize operations, enhance efficiency and improve overall performance.

Eligibility Criteria

1. **Show expertise in a broad set of supply chain functions and their integration**, including, but not limited to, product development, manufacturing, planning, execution and fulfillment, logistics and customer service

2. **Have proven methodologies, frameworks and best practices** to support cost and process optimization

3. Ability to **design and implement a transformation program that reflects a** compelling strategic intent, change management capabilities and technical prowess

4. **Show expertise in RPA, AI, analytics and GenAI**

5. **Demonstrate delivery capabilities in the regions under study**

6. **Have qualified professionals** with business-specific and industry-specific supply chain BPO services knowledge and experience

7. **Have knowledge of regional/ local regulations**

8. **Have experience in risk management, data analytics, compliance and change management**

Circular Supply Chain Services

Definition

This quadrant assesses service providers that offer circular supply chain services, have related capabilities and use technologies to enhance these operations. They are expected to understand clients' business strategies and current operations to assist them in developing roadmaps and implementing circular supply chain solutions.

Efficient, technology-enabled supply chains are becoming increasingly important to undertake circular supply chain initiatives. Enterprises can streamline operations, optimize resource use and reduce environmental impact through circular business process tools and management. Industry-specific operating technologies, with tailored solutions, enhance these efforts. Enterprises are seeking providers that focus on aspects such as resource efficiency, waste reduction, improved recycling rates, reverse logistics, and disassembly and reuse, and can offer circular business models ranging from traditional liner models (make, use and dispose) to circular models (reuse, recycle and remanufacture). Providers must assist clients in implementing traceability tools

and accelerators, circular-economy-focused frameworks and digital solutions to support aspects such as product design, packaging, supply chain resilience against inflation in commodity markets, waste management, tax implications, transparency and greenwashing, and supplier collaboration. These solutions must enable end-to-end transparency and product lifecycle management.

Providers must offer cross-industry and value chain solutions, encompassing waste management, and decommissioning and redevelopment services to address environmental concerns and foster circular economy practices. They must have experience in integrating technologies such as blockchain, IoT, AI, big data analytics, tracking tools and dashboards.

Eligibility Criteria

1. Have the ability to assist clients in understanding **how circular supply chains help reduce carbon impact** and create real-time monitoring systems

2. Deliver circular supply chain initiatives by deploying **analytics, automation and real-time dashboards**

3. Actively participate in the circular economy and make efforts to reduce the consumption of natural resources **by building an approach for reverse logistics**

4. Show the use **of AI, blockchain and IoT** in delivering opportunities for advanced circular economy solutions

5. Offer strong consulting and advising capabilities to assist clients with circular supply chain roadmaps

6. Provide services that capture, monitor, report and track circular supply chain initiatives such as product lifecycle management

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Supply Chain Services 2024:

Quadrants	U.S.	Brazil	Europe
Supply Chain Advisory and Consulting Services	✔	✔	✔
Supply Chain IT Operations Services	✔	✔	✔
Supply Chain BPO Services	✔	✔	✔
Circular Supply Chain Services	✔	✔	✔

Schedule

The research phase falls in the period between May and June, 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in October 2024.

Milestones	Beginning	End
Survey Launch	May 6, 2024	
Survey Phase	May 6, 2024	June 6, 2024
Sneak Previews	August 27, 2024	
Press Release & Publication	October 2024	

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

The ISG Provider Lens 2024 – 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.

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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 May 2024, 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.

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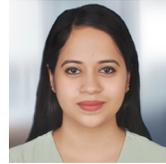**Assistant Manager & Lead Research Specialist**

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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

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Huber

Partner

Shahid
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Director

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Pillai

Director and Practice Leader Retail, CPG and Enterprise

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

*Rated in previous iteration

4flow *	BR Supply	DXC	Group50 Consulting *
Accenture *	BRQ *	Ecovadis	HCLTech *
Advision Consulting	Camelot Management Consultants AG	EPAM Systems *	Hitachi Digital Services
Alvarez & Marsal *	Capgemini *	Exed Consulting	IBM *
Aquanima *	CDW	EXL *	ILOS *
Argon & Co	Celestica	EY *	IMAM
Artefact	CGI	Falconi *	Infosys *
Arvato Systems	Chainalytics *	Fcamara	Integration *
Ascensus Group	Clarkston Consulting *	Fiorde Group	Invensis *
Atos *	Cognizant *	Fortna	Kearney *
Avnet	Connexxion *	Fujitsu	KPMG *
Bain & Company *	Corbus	Genpact *	Kyndryl
BCG *	Cybage	GEP *	Level Group *
BDO	Deloitte Digital *	Globant	Leverage+
Birlasoft *	dss+	Groenewout Consultants & Engineers	Lincros *

Invited Companies

LTIMindtree *	PwC *	T-Systems *
LTTS	Qlog	Unisoma *
MadeInWeb *	Radix	Unisys
Maine Pointe *	Reply	UST *
McKinsey *	Roland Berger	Virtusa
Miebach Consulting Group	SCALA Consulting	Visagio *
Moby *	SCS Global	Wipro *
Mphasis *	Softserve	WNS *
Nexdigm *	Softtek	Xcelis *
Nstech & RoutEasy	sphera	Zensar *
NTT DATA	Stefanini *	Zones *
Oliver Wight	Supply Solutions *	
Opentech *	TCS *	
Partners in Performance	Tech Mahindra *	
Peers *	Thoucentric	
Procurement Garage	Tietoevry	
Proudfoot	Trinamix	

About Our Company & Research

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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For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 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.

For more information, visit isg-one.com.

iSG Provider Lens™

MAY, 2024

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