ISG Provider Lens™

Supply Chain Services

A research report comparing provider strengths, challenges and competitive differentiators

Table of Contents 🏠

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 chains 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).

Key focus areas for Supply Chain Services 2023

Simplified Illustration Source: ISG 2023

Supply Chain Advisory and Consulting Services

Supply Chain Operations Services

Supply Chain BPO Services

Definition

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 markets such as the U.S. and Brazil

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

Supply chain advisory and consulting services focus on helping clients achieve resilient, adaptive, connected, data-driven and sustainable supply chains to mitigate global disruptions and instability. Providers must offer major capabilities such as supply chain and operation strategy design; supply chain network configuration and optimization; process architecture design and modeling; conceptualizing new digital business models, products and services; data orchestration strategy and a roadmap for the connected and collaborative supply chain; organizational change management (OCM); digital technology consulting and regulation and compliance services. These services help enterprises build new supply chain models or reinvent their current ones by applying the existing capabilities across market opportunities. Providers are expected to support their consulting capabilities with a portfolio of tools and accelerators.

Providers will offer comprehensive consulting services to deliver the most connected and visible supply chain environment that can adapt to the scope and pace of generational business, technological, economic and political changes.

Supply chain consulting service providers build and continuously adapt their portfolios to enable the best possible results over the longest predictable timeframes. Providers continually integrate new and emerging digital technologies with strategic insights and creative problem-solving skills. The leading services providers partner with leading platform vendors to enable the most adaptable, reliable and secure environments over time. However, true leaders deliver business value that is aligned with a working vision of what the supply chain is and will be.

Eligibility Criteria

1. Supply chain and business strategy development and adaptation

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

3. **Digital business transformation** competency focusing on offering a connected and sustainable supply chain

4. Capability to **design service transformation and strategic roadmap development**, implementation and adaptation, including transitioning from current to future structure and operations

5. **Experience in organizational design and technology change management**

6. **Strong understanding and proven experience with digital technologies** such as advanced analytics, AI, ML, IoT, blockchain and digital twin

7. Must demonstrate work delivered for clients in the study region

8. Focus on training and certifying an established team of experienced consultants

Supply Chain Operation Services

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/ML and others are playing a 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

Supply Chain BPO Services

Definition

Disruptions in global and local production, logistics and labor over the past few years have not only led to a reexamination of supply chain functions and integration but also evaluation of new operating models and business partners, leading to expanded supply chain outsourcing. Organizations that never consider outsourcing any supply chain function are now considering supply chain BPO services. To foster long-term, strategic business transformation, the classic decision of make versus buy is now a pillar to every supply chain function, from product development, planning, procurement, manufacturing, logistics, customer service and many others. Some companies just want to excel in their core business, while others search for expertise, scale, human resources or advanced digital technologies. However, the ultimate goal is to reduce operational costs significantly. The pace of this transformation is an important criterion to evaluate vendors, but how those companies manage the change and sustain the benefits year over year is crucial to the decision making. New requirements, such

as United Nations' 17 Sustainable Development Goals (SDGs), are on the table. Still, sometimes, achieving more straightforward net-zero carbon emissions targets or gender equality and inclusion are the real challenges. Companies on the cusp of digital transformation envision tremendous opportunities in building data lakes and applying AI-driven analytics, IoT, blockchain, RPA and a significant number of new technologies that can bring supply chain end-to-end visibility, better collaboration and insights, mitigate risks and generate more value to the business.

The quadrant will examine the capability of providers to transform businesses, reduce operational costs, increase service levels, manage and sustain change and infuse digital technologies.

Eligibility Criteria

1. **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. **Proven methodology, frameworks and best practices** to drive supply chain transformation

3. Ability to **design and implement a transformation program** with compelling strategic intent, pace and sustainability of results, change management and technical prowess

4. Strong experience in implementing digital transformation technologies including but not limited to **RPA, blockchain, IoT and analytics**

5. **Demonstrate work delivered to clients in the study region**

6. **Experienced and qualified professionals** to support end-to-end implementation and business-specific and industry-specific supply chain BPO services

7. **Strong knowledge of regional and local regulatory requirements**

Quadrants by Region

As part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Supply Chain Services 2023:

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

Schedule

The research phase falls in the period between April and June, 2023, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in August 2023.

Milestones	Beginning	End
Survey Launch	April 26, 2023	
Survey Phase	April 27, 2023	May 26, 2023
Sneak Previews	July 31, 2023	
Press Release & Publication	September 2023	

Please refer to the link to view/download the ISG Provider Lens™ 2023 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
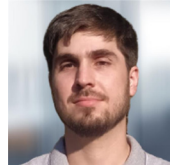Excellence

Contacts For This Study
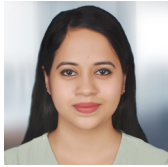
Greeshma
A C

Project Manager

Bhuvaneshwari
Mohan
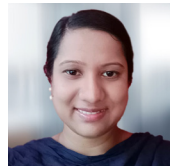
**Research Analyst
U.S.**

Tarun
Vaid

Lead Analyst U.S.

Gabriel
Sobanski

**Research Analyst
Brazil**

Ana
Lin

Lead Analyst Brazil

Sarida
Khatun

Data Analyst

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

Sush
Apshankar

Principal Consultant

Bill
Huber

Partner

Sunder
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

Accenture	Cybage	HCLTech	NTT Data
Alvarez & Marsal	Deloitte Digital	IBM	Oliver Wight
Aquanima	Dentsu (ex-Cosin)	Ilos	Opentech
Artefact	dss+	Infosys	Partners in Performance
Arvato Systems	DXC Technology	Integration	Peers
Ascensus Group	eInfochips	Kearney	Procurement Garage
Atos	EXL	KPMG	Proudfoot
Bain & Co.	EY	Level Group	PwC
BCG	Falconi	Lincros	Qlog
BDO	Fcamara	LTIMindtree	Reply
BRQ	Fiorde Group	MadeInWeb	Roland Berger
Capgemini	Fortna	McKinsey	Stefanini
CGI	Genpact	Moby	Supply Solutions
Cognizant	GEP	Mphasis	TCS
Connexxion	Group50 Consulting	N-iX	Tech Mahindra

Invited Companies

Thoucentric

Tredence

T-Systems

Unisoma

Unisys

UST

Virtusa

Visagio

Wipro

WNS

Xcelis

Zensar

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.

ISG offers research specifically about providers to state and local governments (including counties, cities) as well as higher education institutions. Visit: Public Sector.

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 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 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.

For more information, visit isg-one.com.

ISG Provider Lens™

AUGUST, 2023

REPORT: SUPPLY CHAIN SERVICES