

# Supply Chain Services

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



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The supply chain landscape is transforming rapidly, driven by a convergence of innovation, intricacy and volatility. Companies face challenges from global uncertainties, changing demand, the push for faster, greener and more tailored services, and the rising tariffs that have significantly impacted overall production and supply chains.

In response to these challenges, companies are rethinking their supply chain strategies. They are utilizing advanced technologies, specialized consulting and data-driven insights to maintain competitiveness and resilience. The focus has shifted to creating intelligent, agile and environmentally responsible supply chains that can adapt and thrive amid constant change. This wave of innovation is not just addressing today's challenges but is also laying the foundation for the supply chain of the future: connected, adaptive and future-proof.

This study assesses provider capabilities across key domains, including supply chain consulting, operations modernization, managed services and circular supply chain solutions. Providers are expected to optimize supply

chains by leveraging AI-driven technologies such as agentic models, predictive analytics and automation, in combination with IoT, blockchain, digital twins and ML. The study highlights the importance of real-time collaboration, data-driven decision-making and data orchestration to drive sustainability and progress toward net carbon neutrality.

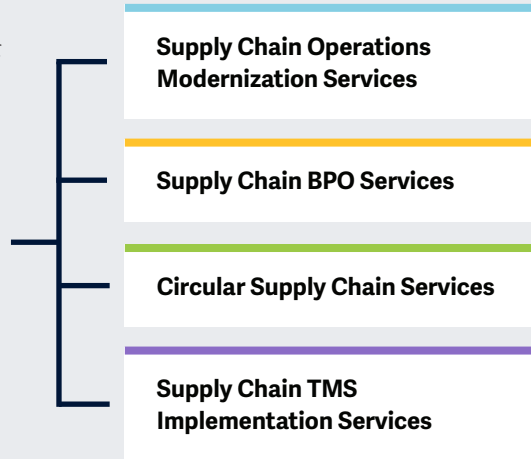
Enterprises today are seeking providers that can:

- adapt to varying levels of digital maturity across business units and regions.
- provide modular, scalable and industry-specific solutions.
- accelerate ROI through measurable process improvements.
- align transformation with ESG and circular economy goals.



# Key focus areas of the **Supply Chain Services 2025** study

Simplified Illustration Source: ISG 2025



## 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 global and Brazil markets

Our 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 these reports to evaluate their current vendor relationships and potential engagements.



## Supply Chain Operations Modernization Services

### Definition

This quadrant evaluates service providers that support end-to-end supply chain operation modernization initiatives by offering consulting, implementation and managed services to transform traditional supply chains into agile, resilient and data-driven operations.

Enterprises seek providers enabling modernization through digital technologies, optimized processes and advanced operating models to enhance supply chain visibility, reduce operational costs and support the shift toward resilient and circular supply chain strategies. They look for providers that offer enhanced visibility, data-driven processes, data orchestration, compliance, change management and digital transformation.

Providers must accommodate varying digital maturity levels and address legacy system complexities. They should enable resilient, future-ready supply chains using AI, automation and analytics to deliver real-time insights,

inform decisions and optimize each subprocess within SCM, such as inventory management and planning, while supporting scalable transformation across diverse industries and supply chain landscapes.

### Eligibility Criteria

1. Use **reference models, assessment framework templates and best practices** to support modernization
2. Have an **established team of consultants** with both **technology and supply chain domain expertise**
3. Provide **core supply chain services** that support at least two **operations areas**, including **planning and forecasting, execution, manufacturing, after-sales and procurement**
4. Offer **AI-enabled tools, solutions and services** to address **complex modernization requirements**
5. Design **technical solutions** in alignment with **reference architecture, clients' digital maturity and business goals, and industry challenges**
6. Deliver **supporting capabilities** such as **ADM, data security, compliance and tailored solutions**
7. Present **referenceable use cases** for **data-driven supply chains, data orchestration and automation of supply chain functions**
8. Demonstrate a **robust growth strategy and innovation road map** to deliver **future-ready supply chains**
9. Showcase a **strong consulting portfolio** with **design thinking and alternative methodologies** to involve customers in the **design of products, services and transformation road maps**



## Supply Chain BPO Services

### Definition

This quadrant assesses providers that offer supply chain BPO services by managing specific supply chain functions and leveraging advanced technologies such as AI, IoT, blockchain and big data analytics.

Enterprises seek providers offering support across procurement, inventory optimization, order fulfillment, transportation, customer service and logistics management to drive operational efficiency, reduce costs, and enhance visibility and responsiveness across supply chains.

In the current landscape, procurement and after-sales services represent the most prominent areas for BPO adoption. Providers must demonstrate the ability to integrate technologies such as automation, AI, chatbots, RPA, predictive analytics, sentiment analysis and NLP, alongside delivery models such as data as a service, risk management as a service, and compliance as a service. They should back their offerings with results-driven outsourcing frameworks focused on process optimization, cost efficiency and operational scalability.

### Eligibility Criteria

1. Possess a **strong vision** to grow the **F&A practice** and offer **end-to-end supply chain BPO services**
2. Demonstrate **industry and domain expertise** with **vertically trained full-time employees** (FTEs) to manage **core supply chain functions** and lead the **digital implementation of the road map**
3. Utilize **proven methodologies, frameworks and best practices** to support **cost and process optimization**
4. Exhibit deep **domain expertise** in **technologies and their applications**, including **automation, analytics, AI and ML**
5. Maintain a **strong partner ecosystem** supporting **key supply chain processes** to drive **innovation, digital transformation** and the adoption of **emerging technologies** such as **GenAI** and **agentic AI**
6. Have a **global delivery model** with **offshore and nearshore delivery centers**
7. Present **referenceable use cases** for delivering improved **logistics management, order fulfillment, reverse logistics and customer service**
8. Have **knowledge of regional and local regulations**
9. Possess **experience in risk management, data analytics, compliance and change management**



## Circular Supply Chain Services

### Definition

This quadrant assesses providers that offer circular supply chain services, possess related capabilities and utilize technologies to enhance supply chains.

Enterprises seek 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, helping them transition from traditional linear models (make, use and dispose) to circular models (reuse, recycle and remanufacture).

Providers must assist enterprises 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 commodity market inflation, waste management, tax implications, transparency, greenwashing and supplier collaboration. These solutions must enable end-to-end transparency, digital traceability, decarbonization, regulatory compliance and product lifecycle management.

### Eligibility Criteria

1. Possess a **strong vision** to grow **circular and sustainable supply chain practices** and offer **robust tools and accelerators** for the same
2. Deliver **circular supply chain initiatives** by deploying **analytics, automation and real-time dashboards**
3. Provide services that **capture, monitor, report and track circular supply chain initiatives**, such as product lifecycle management
4. Offer **digital-technology-based guidance and audit and assurance services** relevant to global, national and industry-specific sustainability and circular supply chain policies, regulations, frameworks and standards
5. Leverage AI, ML, digital twins, IoT, blockchain and similar technologies to **integrate and automate sustainability data and processes** for improved decision-making across the value chain
6. Offer **strong consulting and advisory capabilities** to assist clients with **circular supply chain road maps**
7. Demonstrate **references** for assisting clients in **diversifying their supplier base** and managing **Scope 2 and 3 emissions** to support the **extended supply chain, reverse logistics and resource optimization**



## Supply Chain TMS Implementation Services

### Definition

This quadrant evaluates providers that offer transportation management system (TMS) Implementation Services, including modeling and operational support capabilities.

Companies are seeking partners to address recent major tax changes in Brazil and worldwide, key regional challenges such as tax and regulatory complexity, long transportation distances with high logistics costs, limited carrier availability and management challenges, and gaps in digitalization and operational efficiency in logistics.

To meet these needs, providers must demonstrate expertise through robust methodologies, proprietary accelerators, and a skilled workforce trained and certified and TMS platforms. Providers must also demonstrate successful delivery through strong customer references and real-world experience.

Service providers are expected to have expertise in one or more market system solutions, such as:

- Benner Logística
- BluJay Solutions (E2open)
- Cerasis TMS
- Descartes Systems Group
- Infor Nexus
- Kuebix TMS (Trimble)
- Manhattan Associates TMS
- MercuryGate TMS
- Oracle Transportation Management (OTM)
- Project44
- SAP Transportation Management
- Senior Sistemas (Senior X)
- Softeon TMS
- Transporeon
- TOTVS
- Other unlisted or proprietary solutions

### Eligibility Criteria

1. Demonstrate **capabilities** in TMS modeling and software implementation
2. Provide **strategic and business vision** converging the company's strategic objectives achieving cost reduction and improving sustainable services
3. Maintain a **consolidated team of consultants** with expertise in technology, transportation and **TMS**, and **taxation** systems in Brazil (such as ICMS), including **logistics and transportation engineers**, applied mathematics experts and professionals certified in SCM tools (such as APICS programs and certifications)
4. Provide referenceable **use cases and exhibit skills** in creating business cases and studying logistics scenarios (such as consolidation points, distribution centers and logistics networks)
5. Maintain a **strong consulting portfolio** with design thinking and alternative methodologies to involve clients in designing solutions, services, transformation road maps and training programs
6. Cover **main pillars** such as **networks design tax, warehouse management system and TMS, routing, control tower and logistics warehouse transformation**





## Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following four quadrants on Supply Chain Services 2025:

Quadrant	Global	Brazil
Supply Chain Operations Modernization Services	✓	✓
Supply Chain BPO Services	✓	✓
Circular Supply Chain Services	✓	✓
Supply Chain TMS Implementation Services		✓



The research phase falls in the period between May and July 2025, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2025.

<b>Milestones</b>	<b>Beginning</b>	<b>End</b>
Survey Launch	May 05, 2025	
Survey Phase	May 05, 2025	June 06, 2025
Sneak Preview	August 2025	
Press Release & Publication	September 2025	

Collecting client testimonials via the Star of Excellence™ program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2025 research agenda.

#### **Access to Online Portal**

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

#### **Buyers Guide**

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Supply Chain Services IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2025. For more information, refer to the [Buyers Guide research schedule](#).

#### **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:  
[star@cx.isg-one.com](mailto:star@cx.isg-one.com)



**ISG Star of Excellence**



The ISG Provider Lens 2025 – Supply Chain Services research study analyzes the relevant software vendors/service providers in the Global and Brazil 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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



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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



Bill  
Huber

**Partner, Digital  
Transformation & Cost  
Optimization**



Shahid  
Bhatti

**Director**



Sunder  
Pillai

**Director**



## 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*	Birlasoft*	Datamatics	Genpact*
Accenture*	Bristlecone	Deloitte Digital	GEP*
Advision Consulting	BRQ*	Deloitte*	Group50*
Alvarez & Marsal*	Camelot*	Dragon Sourcing	HCLTech*
Aquanima*	Capgemini*	dss+	Hitachi Digital Services*
Artefact	CGI	DXC Technology	IBM*
Arvato*	Chain IQ	EPAM Systems*	ILOS*
Ascensus Group	Clarkston Consulting*	Exed Consulting*	IMAM
Atos*	Coforge	Exela Technologies	Infosys*
Avanade	Cognizant*	EXL*	Integration Consulting
Avnet*	Concentrix	EY*	Invensis*
Bain	Conduent	Falconi*	Jade Global
BCG*	Connexion	Fcamara	Kearney*
BDO	Corbus*	Fiorde Group*	KPMG*
BearingPoint	Cybage*	Flex	Kyndryl*



## Invited Companies

Level Group\*

Leverage+\*

Lincros\*

LTIMindtree\*

MadeInWeb\*

Maine Pointe\*

Martin Brower

McKinsey\*

Miebach Consulting

Moby\*

Mphasis\*

Neo Tangent\*

Nextdigm\*

N-iX

NTT DATA

Oliver Wight

Opentech

Partners in Performance

Peers\*

Procurement Garage

Proudfoot

PwC\*

Qlog

Roland Berger

Sequor

Stefanini\*

Supply Solutions\*

TCS\*

Tech Mahindra\*

The Supply Chain Consulting Group

T-Systems\*

Unisoma\*

UST\*

Visagio\*

Visionet Systems

Wipro\*

WNS\*

Xcelis

Zensar Technologies\*

Zones\*





## 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](mailto:contact@isg-one.com), call +1.203.454.3900, or visit [research.isg-one.com](http://research.isg-one.com).

## ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit [isg-one.com](http://isg-one.com).





**MAY, 2025**



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