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HFS Top 10 Supply Chain Service Providers

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"The term 'supply chain' is a misnomer for meeting the realities of today's world. It connotates linear and constrained thinking. We need to break free. *It's time to unchain your supply chain.*"

—Saurabh Gupta, President, HFS Research

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Introduction

- COVID-19 shined a light on our supply chains and illuminated the cracks that have always existed. At the same time, the pandemic shock created a once-in-a-lifetime opportunity for supply chain executives to do what we always knew we had to do.

- HFS envisions the supply chain as a networked function that needs an ecosystem approach—both internally and externally. Organizations will need to collaborate across industries to pinpoint where disruption is coming from, where to disrupt, and how to keep reinventing themselves in an unforgiving world where we no longer have time to rest on our laurels.

- The *HFS Top 10 Supply Chain Service Providers* report analyzes 11 leading service providers across a defined series of innovation, execution, and voice of the customer criteria. The report looks at supply chain IT, business, and consulting services across supply chain planning, order management, inventory management, sourcing and procurement, aftermarket services, and sustainability.

- This report also includes detailed profiles of each service provider, outlining their overall and sub-category rankings, provider facts, and detailed strength and development opportunities.

- The inputs to this report included detailed RFI responses and briefings with all participating service providers, interviews and surveys with enterprise reference clients and enterprises in HFS' network, and publicly available information sources.

Supply chain services | The HFS Research value chain

Supply chain management

Planning and design	Order management	Inventory management	Procurement and sourcing	Aftermarket services	Supply chain sustainability	Transportation management
• Strategic planning (demand, capacity, sales and operations) • Scenario simulation • Network design • Master data management	• Order entry • Order maintenance • Order reporting • Forecasting • Demand planning and promotion management	• Inventory strategy and forecasting • Inventory reporting • Replenishment ordering • Spare parts planning • CFPR across clients	• Strategic sourcing • Category management • Contract management • Supplier management • Transactional procurement	• RMA management • Approving returns • Customer service • Warranty management • Control tower services	• Carbon footprint management • Traceability and transparency • Ethical sourcing and modern slavery • Reporting, legal, and compliance	• Shipping and freight requests • Transportation strategy • Carrier management • Operating a 4PL • Transportation planning

Primary report focus

Enabling technologies

RPA | Process mining | Artificial intelligence | Smart analytics | Blockchain | IoT | Cloud | Mobility | 3D printing mobility | 5G

Horizontal IT processes

Application development and maintenance | Intelligence and decision making | Infrastructure management | Security management | ERP | PLM
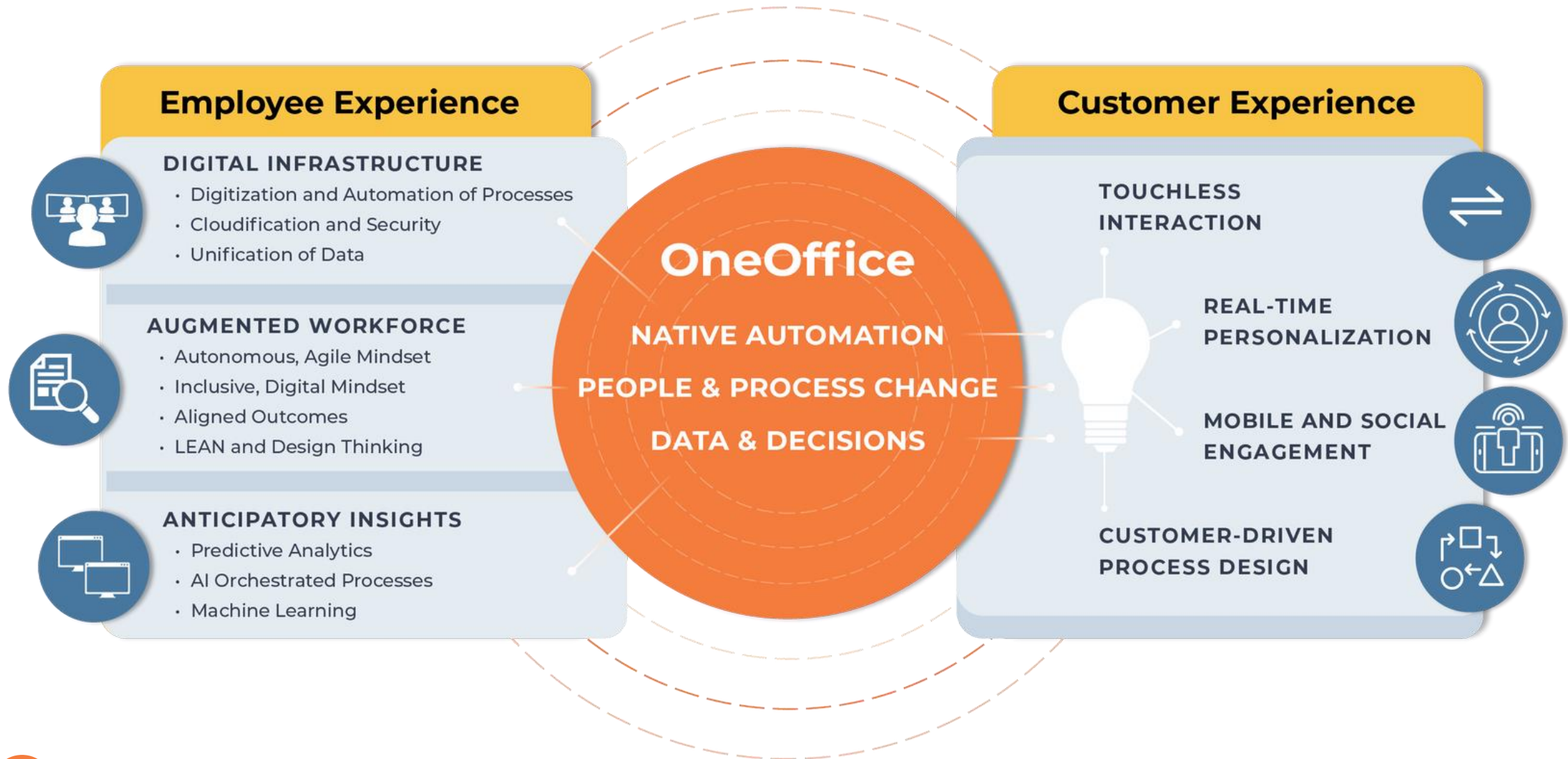
Best practices/methodologies

Lean and Six-Sigma | TQM | ABC/FSN/VED analysis | JIT | EOQ model | Design thinking

Operating model

Shared services | Outsourcing and offshoring | Global business services | BPaaS/SaaS/IaaS | COE

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# Adopting the HFS OneOffice mindset will help enterprises break free from supply chain silos

Employee Experience

DIGITAL INFRASTRUCTURE
- Digitization and Automation of Processes
- Cloudification and Security
- Unification of Data

AUGMENTED WORKFORCE
- Autonomous, Agile Mindset
- Inclusive, Digital Mindset
- Aligned Outcomes
- LEAN and Design Thinking

ANTICIPATORY INSIGHTS
- Predictive Analytics
- AI Orchestrated Processes
- Machine Learning

OneOffice

NATIVE AUTOMATION

PEOPLE & PROCESS CHANGE

DATA & DECISIONS

Customer Experience

TOUCHLESS INTERACTION

REAL-TIME PERSONALIZATION

MOBILE AND SOCIAL ENGAGEMENT

CUSTOMER-DRIVEN PROCESS DESIGN

COVID-19 accelerated the drive toward hyperconnected, autonomous supply chains

Traditional:
Linear and siloed supply chain

Pre-COVID-19:
Circular supply chain
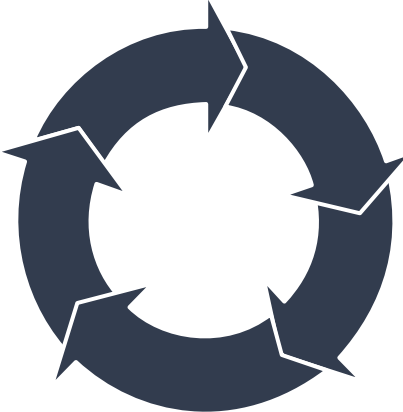
Post-COVID-19:
Hyperconnected autonomous supply chain
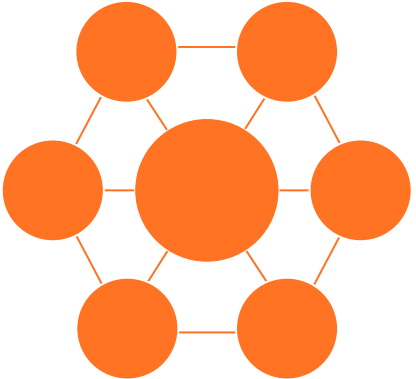
Converging organizational silos

Emergence of ecosystems

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Research methodology

Supply chain service providers covered in this report

Research methodology

This Top 10 research report is based on a comprehensive analysis of supply chain services and solutions. Participating organizations have been assessed across the voice of the customer, ability to execute, and innovation capability. The report looks at supply chain IT, business, and consulting services across supply chain planning, order management, inventory management, sourcing and procurement, aftermarket services, and sustainability.

Voice of the customer (VoC) 33%	Ability to execute 33%	Innovation capability 33%
• **Client referenceability**, quality of client references, and number of references provided • **Average satisfaction** from reference clients • **Average satisfaction** from non-reference clients • **Innovation and business impact** of client case studies presented	• **Scale and experience** based on revenue, number of FTEs, and number of clients • **Breadth and depth of offerings** based on coverage across the supply chain value chain and engagement models (IT services, business services, and consulting services) • **Geographic client portfolio** across North America, Europe, and the rest of the world • **Delivery excellence** based on number of delivery centers, quality of account management, and talent management • **Expertise** based on supply chain and industry-specific knowledge	• **Vision and strategy** for supply chain services • **Investments and partnerships** based on mergers and acquisitions, partnership ecosystem, and pricing flexibility • **Technology innovation** based on proprietary tools and platforms and use of emerging technologies • **Collaboration** based on co-innovation, proactiveness, and responsiveness

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Sources of data

This report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on each of the participants in our study. Sources are as follows.

RFIs and briefings

- Each participating provider completed a detailed RFI
- HFS conducted briefings with executives from each provider

Reference interviews and surveys

- HFS surveyed and interviewed 20+ supply chain client references of participating providers for feedback on the providers' execution and innovation capabilities
- HFS augmented reference client interviews with non-reference client feedback on participating service providers, leveraging its own enterprise network

Other data sources

- HFS OneOffice Pulse Study (H1 2021) based on 800 respondents across the Global 2000 enterprises, including 200 supply chain, operations, and procurement respondents
- Public information, such as white papers, websites, and press releases
- Ongoing interactions, briefings, virtual events, etc., with participants and their clients and partners

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Executive summary

Executive summary (1/2)

- **COVID-19 shined a light on our supply chains and illuminated the cracks that have always existed. The pandemic shock created a once-in-a-lifetime opportunity for supply chain executives to do what we always knew we had to do. We cannot afford to waste this crisis.**

  - Nearly 80% of surveyed Global 2000 executives reported moderate-to-significant impact on their supply chains due to the pandemic shock.
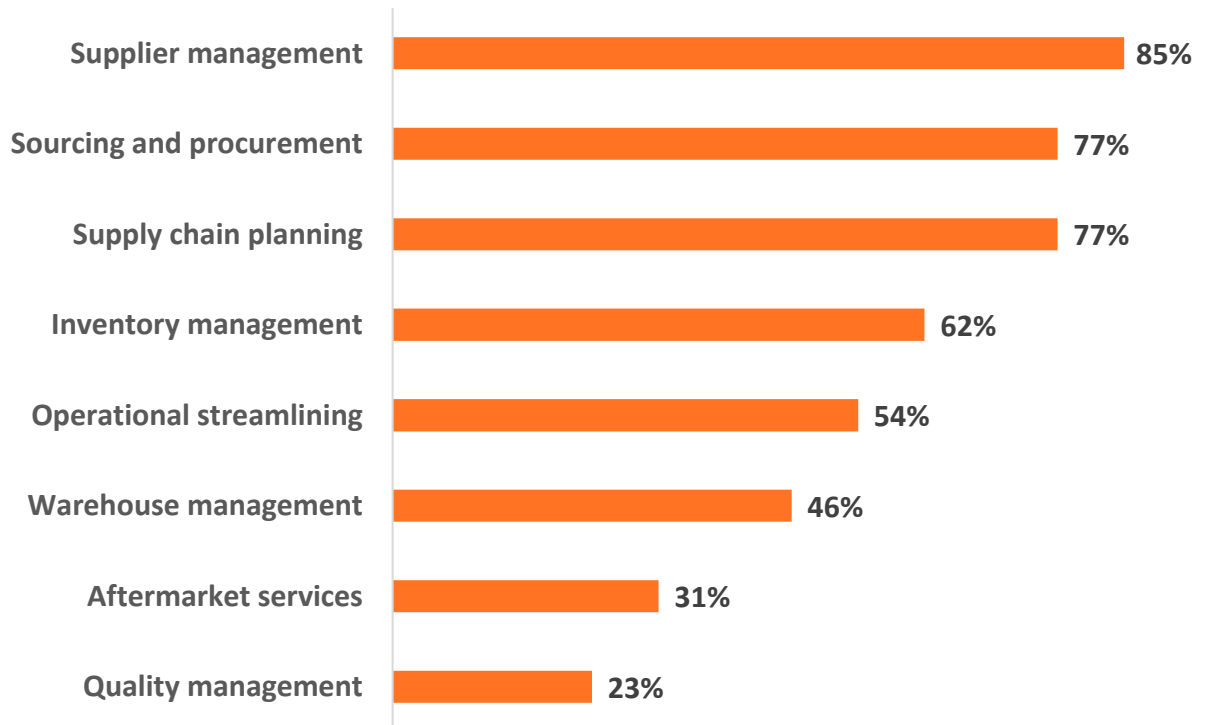
  - Supplier management, supply chain planning, and sourcing and procurement were the most adversely impacted supply chain activities due to COVID-19.

  - The top five changes in ways of working for supply chain executives post COVID-19 are improving supply chain resiliency and transparency, improving environmental sustainability, leveraging alternative talent pools, increasing digital fluency of supply chain professionals, and optimizing end-to-end processes.

- **Unchain your supply chain—adopt the OneOffice mindset**

  - "Supply chain" is a misnomer for meeting the realities of today's world. It suggests linear and constrained thinking.

  - Ninety-nine percent (99%) of supply chain and operations executives across the Global 2000 believe that it is important to drive a OneOffice mindset (connecting the front, middle, and back offices to create a touchless and frictionless digital experience) for their company's overall operation and strategy.

  - Over 70% of supply executives feel that the importance of the OneOffice mindset increased post the pandemic shock.

Executive summary (2/2)

- **Emerging technology is the silver lining for realizing the supply chain of our dreams, but we've only scratched the surface.**
  - Over 70% of supply chain executives expect increases in spending on emerging technologies (across cloud, process automation, process intelligence, AI, smart analytics, blockchain, IoT, and 5G) over the next 12 to 18 months.
  - However, less than 15% of the supply chain executives we interviewed as a part of this Top 10 study have scaled and industrialized these emerging technologies (except process automation at 28%).
  - A lack of C-level commitment, lack of organizational alignment, fragmented systems landscape, and lack of a clear digital strategy are the top supply chain challenges to adopting emerging technologies.
- **The HFS 2021-22 outlook for third-party supply chain services is bullish.**
  - Over 80% of supply chain executives expect third-party services for the supply chain to increase, with an expected growth of approximately 5.5% (weighted average) in the next 12 months.
  - Order management, inventory management, and sourcing and procurement are relatively mature. HFS expects significant untapped potential for third-party services in supply chain planning, aftermarket services, and sustainability services.
- **We assessed 11 supply chain service providers across a defined series of innovation, execution, and voice of the customer criteria. The service providers in the HFS Winners Circle are 1) EY, 2) Accenture, 3) Infosys, 4) TCS, and 5) IBM.**

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Nearly 80% of Global 2000 executives reported moderate to significant impact on their supply chains due to the pandemic shock

To what extent was your supply chain negatively impacted by COVID-19?
Percentage of respondents on a scale of 1-5, where 1 = no negative impact and 5 = significant impact

- ■ No negative impact (1)
- ■ 2
- ■ Moderate (3)
- ■ 4
- ■ Significant impact (5)

Pie values: 6%, 15%, 23%, 30%, 26%
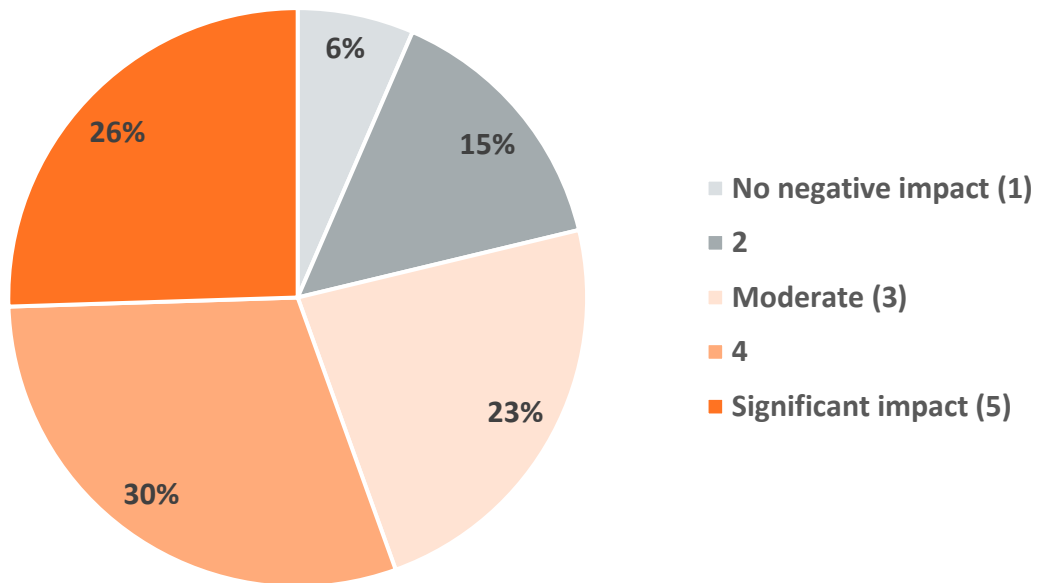
To what extent are each of following being negatively impacted by COVID-19?
Percentage of respondents who indicated medium to significant impact

Category	Percentage
Supplier management	85%
Sourcing and procurement	77%
Supply chain planning	77%
Inventory management	62%
Operational streamlining	54%
Warehouse management	46%
Aftermarket services	31%
Quality management	23%

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Supply chain resiliency, transparency, and sustainability are top-of-mind priorities for supply chain executives

What are the major changes in your organization's ways of working for the next 12 to 18 months?
Percentage of supply chain respondents
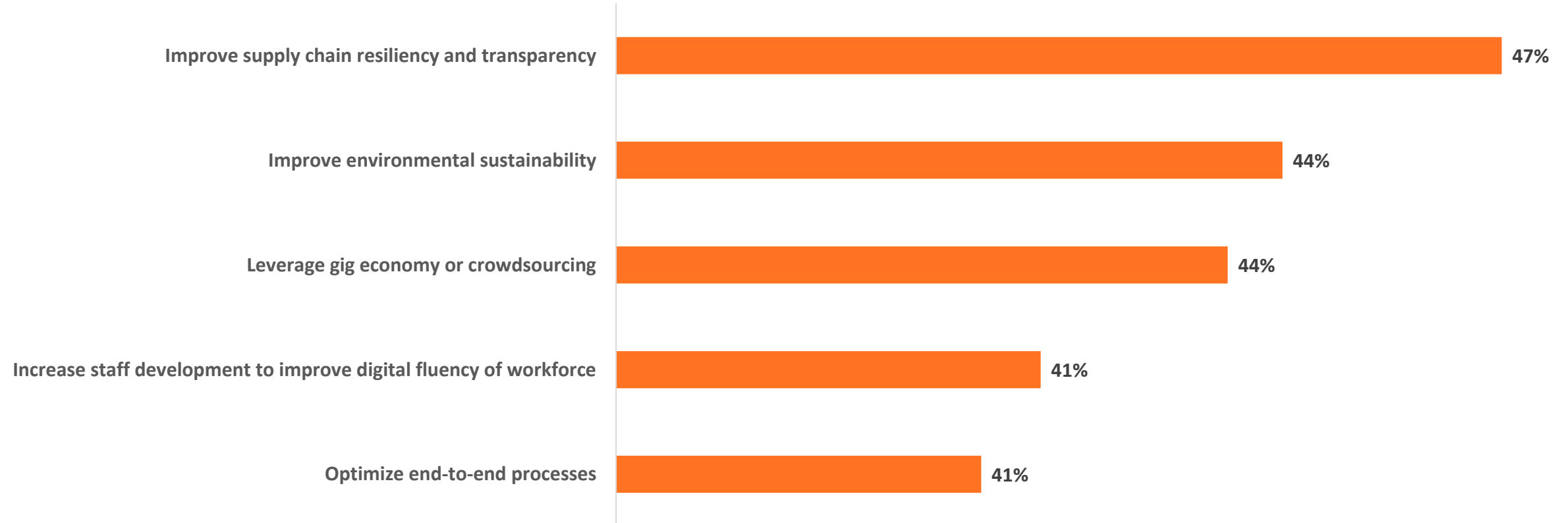
Category	Percentage
Improve supply chain resiliency and transparency	47%
Improve environmental sustainability	44%
Leverage gig economy or crowdsourcing	44%
Increase staff development to improve digital fluency of workforce	41%
Optimize end-to-end processes	41%

Sample: 200 supply chain, operations, and procurement respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

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Unchain your supply chain—adopt the OneOffice mindset

How important is it to drive a OneOffice mindset for your company's overall operation and strategy?
Percentage of supply chain respondents

- Not important, 1%
- Moderately important, 17%
- Mission critical, 20%
- **82%**
- Very important, 62%
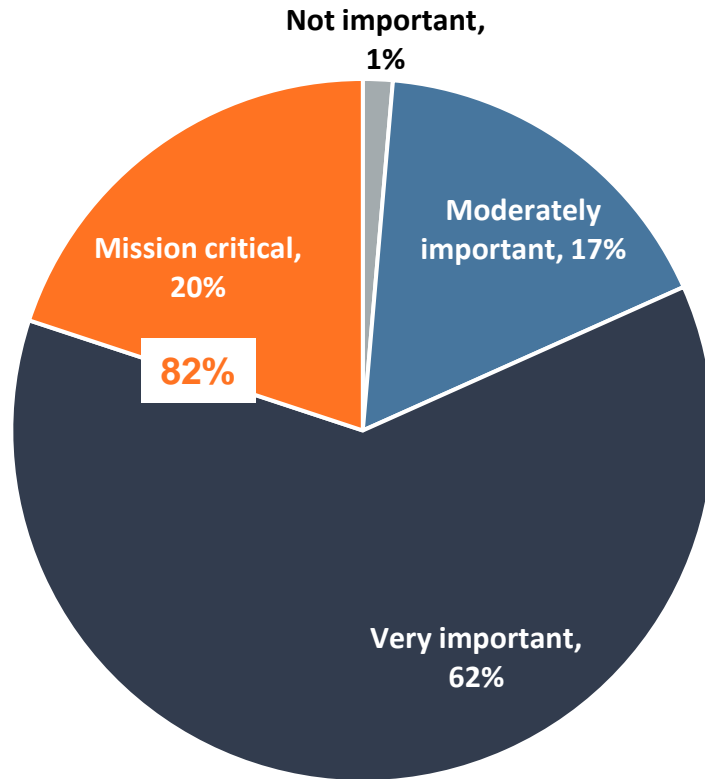
Has the importance of a OneOffice mindset increased or decreased since Q2 2020 (after the pandemic shock)?
Percentage of supply chain respondents
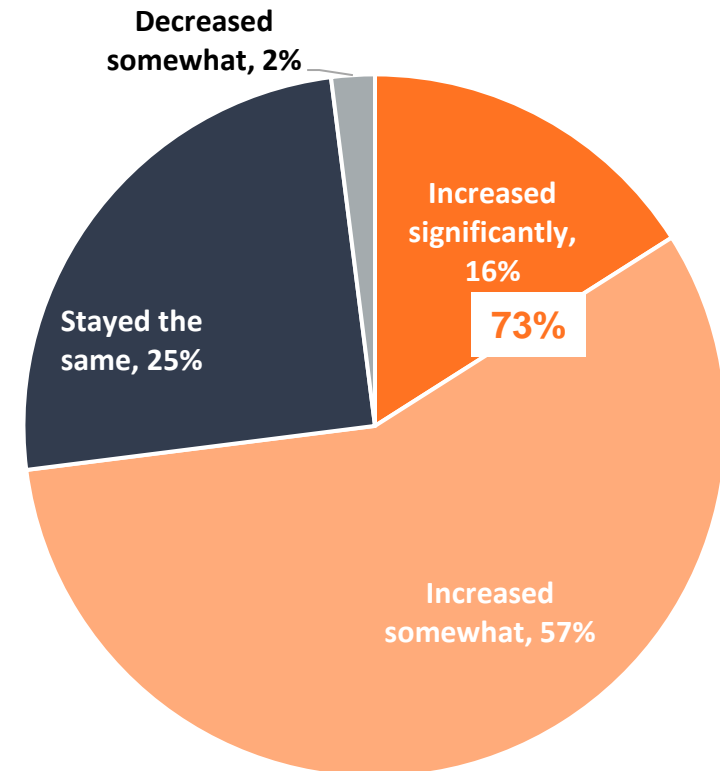
- Decreased somewhat, 2%
- Increased significantly, 16%
- Stayed the same, 25%
- **73%**
- Increased somewhat, 57%

Sample: 200 supply chain, operations, and procurement respondents from Global 2000 enterprises
Source: HFS OneOffice Pulse Study, H1 2021

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The HFS OneOffice organization—digital transformation in action
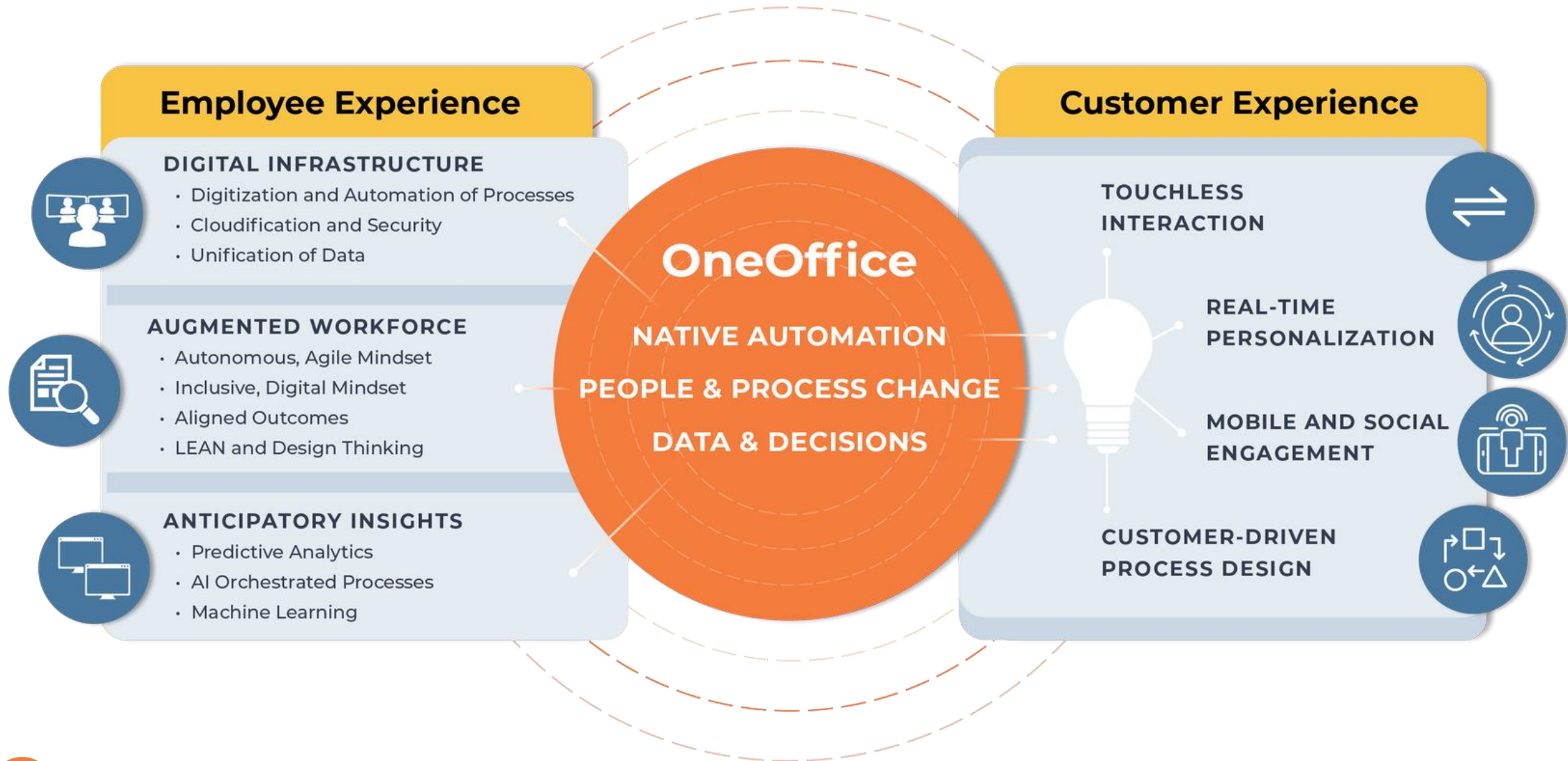
70%+ of supply chain executives expect increased investments across emerging technologies

Do you see investments increasing, decreasing, or staying the same for these technologies over the next 12 to 18 months?
Percentage of supply chain respondents
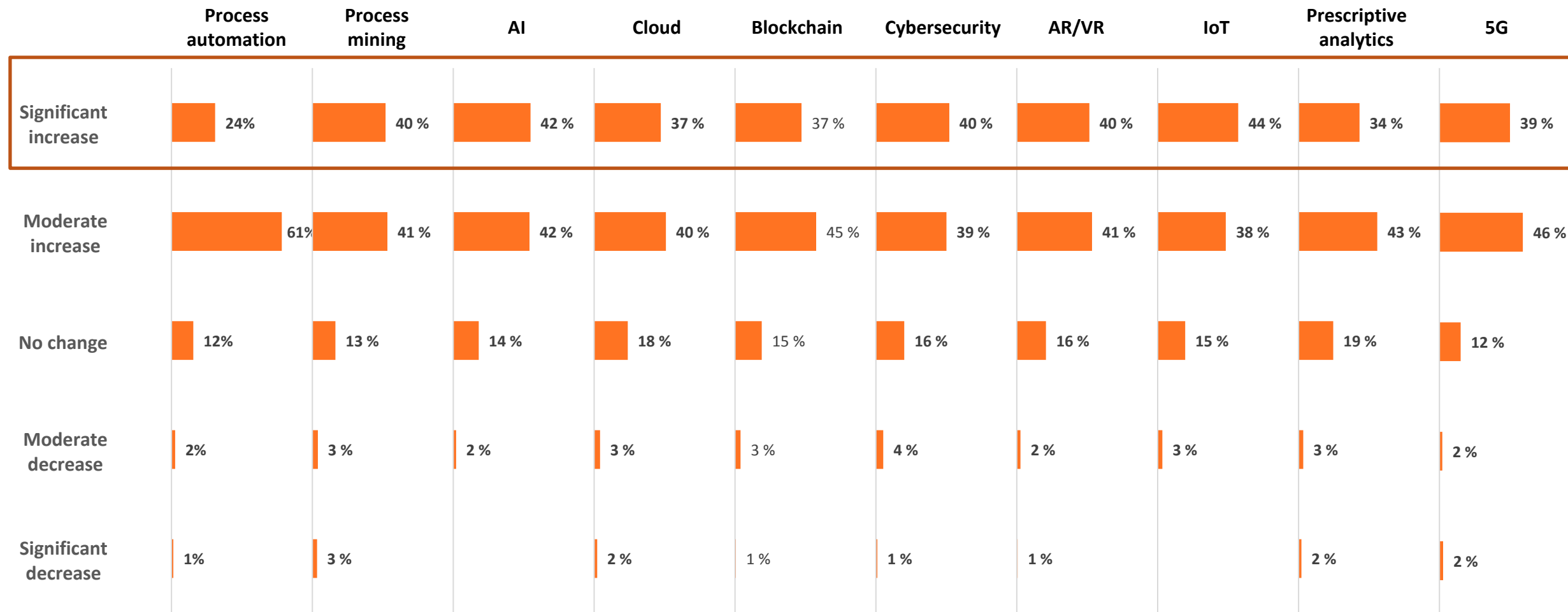
	Process automation	Process mining	AI	Cloud	Blockchain	Cybersecurity	AR/VR	IoT	Prescriptive analytics	5G
Significant increase	24%	40 %	42 %	37 %	37 %	40 %	40 %	44 %	34 %	39 %
Moderate increase	61%	41 %	42 %	40 %	45 %	39 %	41 %	38 %	43 %	46 %
No change	12%	13 %	14 %	18 %	15 %	16 %	16 %	15 %	19 %	12 %
Moderate decrease	2%	3 %	2 %	3 %	3 %	4 %	2 %	3 %	3 %	2 %
Significant decrease	1%	3 %		2 %	1 %	1 %	1 %		2 %	2 %

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However, fewer than 15% of the supply chain executives we interviewed for this Top 10 study have scaled and industrialized these emerging technologies, with the exception of process automation

What is the current stage of implementation of the following emerging technologies in your supply chain operations?
Percentage of respondents
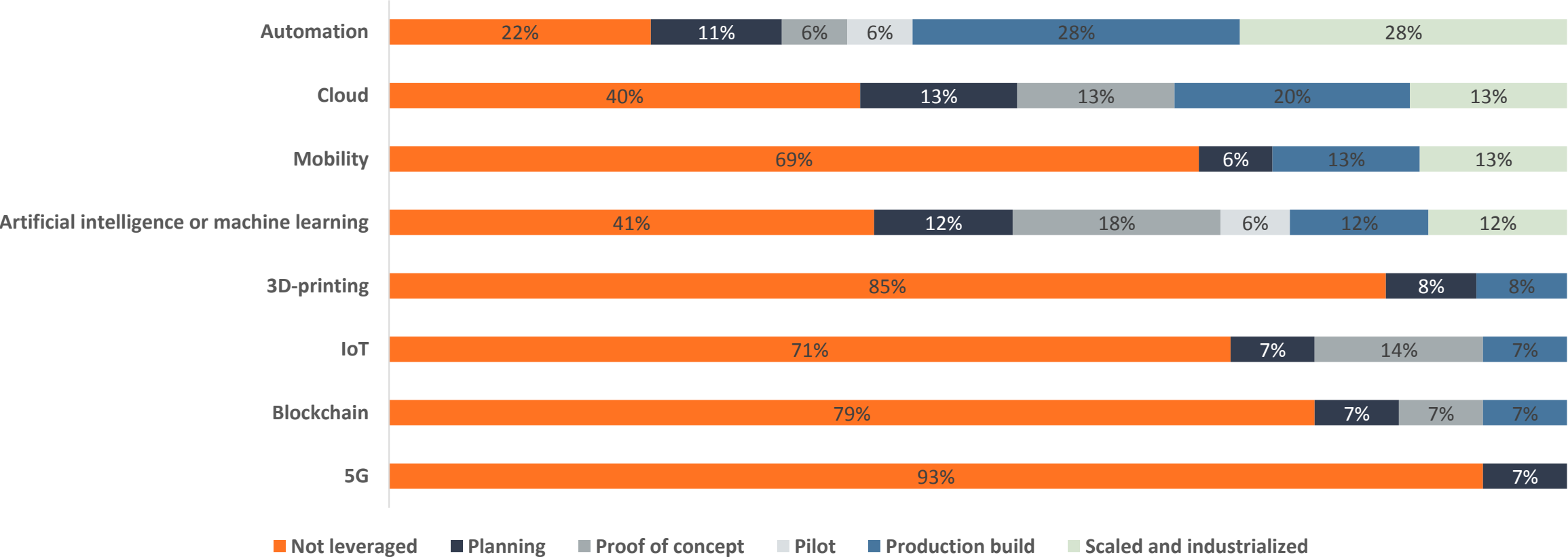
Technology	Not leveraged	Planning	Proof of concept	Pilot	Production build	Scaled and industrialized
Automation	22%	11%	6%	6%	28%	28%
Cloud	40%	13%	13%		20%	13%
Mobility	69%	6%			13%	13%
Artificial intelligence or machine learning	41%	12%	18%	6%	12%	12%
3D-printing	85%	8%			8%	
IoT	71%	7%	14%		7%	
Blockchain	79%	7%	7%		7%	
5G	93%	7%				

Legend: Not leveraged · Planning · Proof of concept · Pilot · Production build · Scaled and industrialized

Over 80% of supply chain executives expect third-party services for supply chain to increase, with an expected growth of ~5.5% (weighted average) in the next 12 months

To what extent will you increase or decrease spending on external third-party services in supply chain?
Percentage of respondents

Weighted average = ~5.5% increase
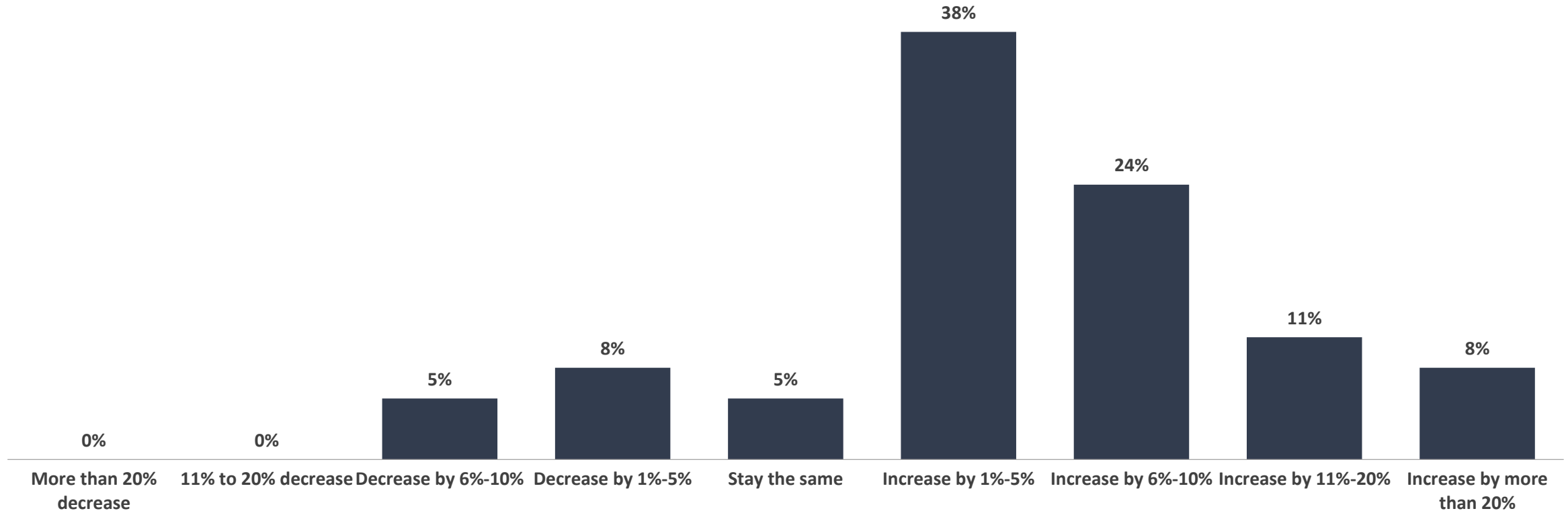
Category	%
More than 20% decrease	0%
11% to 20% decrease	0%
Decrease by 6%-10%	5%
Decrease by 1%-5%	8%
Stay the same	5%
Increase by 1%-5%	38%
Increase by 6%-10%	24%
Increase by 11%-20%	11%
Increase by more than 20%	8%

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HFS expects significant untapped potential for third-party services in supply chain planning, after market services and sustainability services

Supply chain management

Relative maturity of supply chain-specific services

2.8	3.0	2.9	2.9	2.5	2.5
Planning and design	**Order management**	**Inventory management**	**Procurement & sourcing**	**Aftermarket services**	**Supply chain sustainability**

Planning and design		Order management		Inventory management		Procurement & sourcing		Aftermarket services		Supply chain sustainability	
Network design	3.0	Demand planning and promotion management	3.0	Inventory reporting	3.0	Transactional procurement	3.0	Control tower services	2.7	Traceability and transparency	2.7
Scenario simulation	2.7	Order entry	2.9	Spare parts planning	2.9	Strategic sourcing	2.9	RMA[2] management	2.5	Reporting, legal, and compliance	2.6
Master data management	2.7	Order reporting	2.9	Replenishment ordering	2.9	Category management	2.8	Warranty management	2.4	Ethical sourcing / modern slavery	2.5
		Order maintenance	2.9	Inventory strategy and forecasting	2.9	Supplier management	2.8	Customer service	2.4	Carbon footprint management	2.3
		Forecasting	2.8	CPFR[1]	2.6	Contract management	2.8				

1 = Collaborative planning forecasting and replenishment
2 = Return material authorization

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Top 10 results: Supply chain services 2021

Summary of service providers assessed in the report

Service providers (alphabetical order)	HFS point of view
Accenture	Delivering the promise of intelligent supply chains with a "One Accenture" go-to-market strategy
Atos	Digital supply chain solutions focused on realizing efficiency gains along the process
Capgemini	Driving frictionless supply chains leveraging integrated and autonomous operations
EY	Globally integrated end-to-end supply chain offering spanning transformation strategy, managed services, and commercial products
GEP	Pure-play supply chain and procurement solutions provider with unified consulting, software, and managed services
Genpact	Domain-led digital assets to help supply chain clients from design to transform to managed services, translating to responsibility for results
HCL	Integrated digital portfolio of SCM offerings to meet the new level of expectations from the supply chain
IBM	Building intelligent supply chains leveraging exponential technologies
Infosys	"Live" supply chain solutions designed to make supply chains adaptive and resilient, resembling living organisms' ability to sense, reason, respond, and evolve to uncertainties
PwC	Driving high-value outcomes for supply chain clients leveraging a global, industry-focused, and experienced team enabled by emerging technologies
TCS	Consulting-led, end-to-end SCM offerings to deliver resilient, adaptable, purpose-driven, and future-ready supply chains

Top 10 results: Leadership board for supply chain services, 2021

HFS Winners Circle Top 5 providers overall across execution, innovation, and voice of the customer criteria				
#1 EY	#2 accenture	#3 Infosys	#4 tcs TATA CONSULTANCY SERVICES	#5 IBM

Execution powerhouses Top 3 providers on execution criteria			**Innovation champions** Top 3 providers on innovation criteria			**Outstanding voice of the customer** Top 3 providers on VOC		
#1 EY	#2 tcs TATA CONSULTANCY SERVICES	#3 accenture	#1 EY	#2 accenture	#3 Infosys	#1 Infosys	#2 EY	#3 accenture

Other notable performances

- Genpact ranked #1 in collaboration and #3 in delivery excellence
- Capgemini ranked #4 on investments and partnerships and #5 on voice of the customer
- PwC ranked #5 on geographic client portfolio
- GEP ranked #5 on collaboration

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Top 10 results: HFS Supply Chain Services 2021

| Rank | Overall HFS Top 10 position | Execution (33%) | | | | | Overall execution | Innovation (33%) | | | | Overall innovation | Voice of the customer (33%) |
		Scale and experience	Breadth and depth of offerings	Geographic client portfolio	Delivery excellence	Expertise		Strategy and vision	Investments and partnerships	Technology innovations	Collaboration		
#1	EY	EY	TCS	EY	TCS	EY	EY	EY	EY	EY	genpact	EY	Infosys
#2	accenture	TCS	EY	accenture	EY	TCS	TCS	TCS	accenture	accenture	EY	accenture	EY
#3	Infosys	accenture	Infosys	Infosys	genpact	Infosys	accenture	accenture	Infosys	Infosys	TCS	Infosys	accenture
#4	TCS	Infosys	accenture	TCS	Infosys	accenture	Infosys	Infosys	Capgemini	TCS	Infosys	TCS	IBM
#5	IBM	IBM	genpact	pwc	IBM	genpact	IBM	IBM	IBM	IBM	GEP	IBM	Capgemini
#6	genpact	HCL	HCL	IBM	HCL	IBM	HCL	HCL	TCS	genpact	IBM	Capgemini	genpact
#7	Capgemini	pwc	IBM	GEP	accenture	HCL	genpact	genpact	genpact	Capgemini	Capgemini	genpact	HCL
#8	HCL	GEP	pwc	HCL	Capgemini	Capgemini	pwc	Capgemini	HCL	HCL	HCL	HCL	TCS
#9	pwc	genpact	GEP	Atos	GEP	GEP	GEP	GEP	Atos	GEP	pwc	pwc	GEP
#10	GEP	Capgemini	Capgemini	genpact	pwc	pwc	Capgemini	pwc	pwc	pwc	accenture	GEP	pwc

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Supply chain service providers profiles

Globally integrated end-to-end supply chain offering spanning transformation strategy, managed services, and commercial products

EY

Dimension	Rank
HFS Top 10 position	#1
Ability to execute	
Scale and experience	#1
Breadth and depth of offering	#2
Geographic client portfolio	#1
Delivery excellence	#2
Expertise	#1
Innovation capability	
Strategy and vision	#1
Investments and partnerships	#1
Technology innovation	#1
Collaboration	#2
Voice of the customer	#2

Strengths

- **Fully integrated globally delivering strategy through implementation.** EY brings together the capabilities of its service lines (Technology Consulting, Business Consulting, and PAS (People Advisory Services), Tax and Strategy and Transactions) for supply chain practice to offer services that cut across consulting, managed services, and technology products to its client base.
- **Strong repository of proprietary technology assets**. EY has 30+ proprietary assets and tools in the supply chain. Some of its solutions are Supply Chain Intelligence Platform (SCIP), Global Trade Analyzer, AI-Powered planning for Demand, Supply & IBP, Inventory Optimizer, etc.
- **Global reach and scale**. EY has 47K+ practitioners, nearly 2000 clients, and 77 delivery centers for its supply chain practice. It also worked with more than 50% of the Fortune 50 and Fortune 100 companies.
- **Pandemic response.** During the Covid-19, EY worked with some of the leading global governments and is now working with a global life sciences company on their vaccine development and with major US states on their logistics & distribution strategy for a Covid-19 vaccine.
- **Differentiated partnership with P&G.** EY has a strong partnership with P&G around IWS (integrated Work Systems) and SNO (Supply Network Operations) solutions that brings codified know-how to accelerate and de-risk supply chain transformation.
- **Client kudos** for collaboration, expertise, flexibility, and ability to operate from the C-suite to the shop floor.

Development opportunities

- **Understanding client context.** While clients value EY's expertise, they expressed the desire for EY to spend more time upfront to understand client-specific technology landscape and practices.
- **Premium priced.** While EY is strong choice for SCM transformation, it might not be most the cost-effective solution for piecemeal SCM initiatives such as package implementations.

Acquisitions and partnerships

Recent SCM related acquisition:
- **Agility works:** A leading technology consultancy business (2019)
- **Kienbaum:** A process consultancy firm (2017)

Partnerships:
SAP (APO / IBP), SAP (Ariba), IWS (P&G), SAP (EWM, TM, LMS) , Blue Yonder Gep, Microsoft Azure, Blue Yonder, OM Partners, Nokia, Llamasoft, SNO (P&G), Aera
Anaplan, O9, EY Catalyst , Nottingham Spirk, PTC, Blue Prism, IBM Watson, Kinaxis , Oliver Wight, Adexa, Arkieva , E2 Open, Logility, UI Path, Determine, Agiloft, Inc, Hubwoo, Ivalua, Jagger, OpenText, Oracle, Seal, Synertrade, Taulia, Tradeshift, Transcepta, Tungsten Network, PTC, Cisco, GE Digital, Inductive Automation, Rockwell Automation, Siemens, Pega, IBM Maximo , DB Schenker, Dematicm, HDS Global, Intelligrated (owned by Honeywell), Daifuku, Toyota Advanced Logistics (Raymond Material Handling)

Client portfolio

Total no. of Supply chain clients: 1,988
- 50%+ of the Fortune 50 and Fortune 100 enterprises, mainly global consumer products and retail, advanced manufacturing & mobility, global life sciences companies.

Client geography mix:
- NA:33%
- Europe: 47%
- Middle East: 4%
- Africa: 1%
- APAC:10%
- Latin America: 5%

Client industry mix:
Consumer Products & Retail: 18%, Government & Public Sector: 13%, Oil & Gas: 11%, Banking & Capital Markets: 8%, Life Sciences: 7%, Life Sciences 7%, Diversified Industrial Products 6%, Insurance 5%, Automotive & Transportation 5%, Others: 26%

Service delivery operations

Total Headcount for Supply Chain Services: 47,000

Specify delivery locations: 77 Delivery center across Bahamas, Bermuda, United States, Israel, Colombia, Costa Rica, Dominican Republic, Ecuador, Mexico, Panama, Peru, Venezuela, Argentina, Brazil, Chile, Trinidad and Tobago, Indonesia, Malaysia, Maldives, Philippines, Singapore, Sri Lanka, Thailand, Vietnam, China, Taiwan, Japan, Korea, Australia, New Zealand, Angola, Ghana, Kenya, Mauritius, Mozambique, Namibia, South Africa, Uganda, Zimbabwe, Azerbaijan, Czech Republic, Greece, Kazakhstan, Lithuania, Poland
Romania, Russia, Turkey, Ukraine, Austria, Germany, Switzerland, India, Italy, Portugal, Spain, Bahrain, Iraq, Jordan, Kuwait, Oman, Pakistan, Qatar, Saudi Arabia, United Arab Emirates, Denmark, Finland, Norway, Sweden, Ireland, United Kingdom, Algeria, Belgium, France, Ivory Coast, Luxembourg, Tunisia

Proprietary tools and technologies

Supply Chain Intelligence Platform (SCIP); Global Trade Analyzer; SC Genome; EY Assess; SmartMaps™; Process Mining Analytics; Quantitative & Qualitative analytics; Self Adjusting Master Data; Operational Excellence Production System; Catalyst Deployment Manager (incl. Client authoring; Smart Daily Management & Optimization applications; VC Sync™; AI Powered planning for Demand, Supply & IBP; Inventory Optimizer; IReS; Logistics & Warehouse Analytics; Network Optimization; Cost to Serve; Advanced Procurement Analytics; EY Scan; Idea to Launch; EY Vault; Transaction Periscope; Spend Analytics; WOIP; Capital Edge M&A; Logistics Edge; Value Chain Web; CREATE - Contract Analytics Engine; ITTS Engine; SC Mural

Delivering the promise of intelligent supply chains with a "One Accenture" go-to-market strategy

accenture

Dimension	Rank
HFS Top 10 position	#2
Ability to execute	
Scale and experience	#3
Breadth and depth of offering	#4
Geographic client portfolio	#2
Delivery excellence	#7
Expertise	#4
Innovation capability	
Strategy and vision	#3
Investments and partnerships	#2
Technology innovation	#2
Collaboration	#10
Voice of the customer	#3

Strengths

- **One Accenture organizational structure aligned with HFS OneOffice mindset.** Accenture's new organization structure oriented around three markets (North America, Europe, and Growth Markets) allows it to bring together all its services (strategy consulting, technology, and operations) across all dimensions (industry, functions, and emerging technologies) to its clients in a simple and easy to consume way.
- **Intelligent supply chain vision focused on growth.** Accenture offers customer centric, resilient, profitable (zero-based), sustainable and trustworthy (responsible) solutions that help in transforming client organizations' supply chains to a responsible and profitable growth engine.
- **Responsible by Design through purpose led supply chain solutions. Accenture** ensured that sustainability is woven into the core of all supply chain services/solutions to help clients implement, practice and achieve ESG targets.
- **Global supply chain consulting, technology and execution capability that is end-to-end and at scale.** End-to-End solutions at scale continues to be Accenture's sustainable competitive differentiator with presence in over 120 countries.
- **Continued investments.** Accenture utilizes its overall organization strength for supply chain practice that includes its $3B+ cloud-first initiative, Through its venture arm, Accenture invests in promising start-ups. It acquired five supply chain-related companies with E2E analytics AI core competencies in FY 2021
- **Data-driven technology backbone leveraging emerging technologies (AI, AR/VR, cobotics, security, blockchain, and 5G), hyperscale platform components (AWS, Azure, Alibaba, and Google), and 35+ partnerships with COTS solutions.** Accenture built Intelligent Supply Chain Platform that includes 50+ AI apps to deliver applied intelligence micro-services (ZBS / procurement, intelligent planning, intelligent logistics, intelligent manufacturing) to the clients. Also, by sensing the need for supply chain resilience due to the COVID-19 outbreak, Accenture collaborated with MIT to develop a supply chain resilience stress test.
- **Client kudos.** Customers recognize Accenture for its operational excellence and responsiveness.

Development opportunities

- **Perceived premium pricing.** Though Accenture's focus is total value delivered, rather than price, it is addressing this market perception as some clients consider other service providers especially if the scope involves more commoditized supply chain services.
- **Proactive client management.** While clients appreciate its overall capabilities and strategic value proposition, they expect Accenture to be more proactive in sharing market best practices.

Acquisitions and partnerships

Recent SCM related acquisitions:
- **REPL Group:** A Blue Yonder partner focused on supply chains for retail customers (2021)
- **GRA:** A supply chain and logistics consulting firm in Australia (2021)
- **Callisto Integration:** A Canada-based provider of consulting and technology services (2020)
- **SALT Solution:** A technology consultancy . (2020)
- **The Myrtle Consulting Group:** An industrial operations consulting firm (2020)

Partnerships:
SAP, Oracle, Microsoft, AWS, Google, Alibaba, Blue Yonder, Coupa, IBM, Infor, Enterra, Pega, o9 Solutions, Kinaxis, OMP, E2Open, Anaplan and Dassault

Our relationships with 35+ partners help bring scale, platform solutions, industrial assets, delivery acceleration and market presence across the value chain and enable our ability to deliver end-to-end solutions to our clients.

Client portfolio

Total no. of Supply chain clients: 1,788

Marquee supply chain clients:
- Global Hygiene & Health company;
- Major Canadian retailer;
- Global Pharmaceutical company ;
- Global technology company;
- Global food company

Client geography mix:
- NA:41%
- Europe: 39%
- APAC:17%
- Latin America: 3%

Client industry mix:
- CG&S: 25%
- Energy: 12%
- Life sciences: 11%
- Retail: 23%
- Industrial: 29%

Service delivery operations

Total Headcount for Supply Chain Services: 23,078

Accenture provides Business Process Services to organizations throughout the world. It supports clients in more than 120 countries and over 40 languages. This includes 33 regional innovation, sourcing and transaction delivery centers in North America, Latin America, Europe/Middle East/Africa, and Asia.

Specify delivery locations:
North America: The US and Canada; LATAM: Costa Rica, Brazil, Argentina; APAC: India, China, Australia, the Philippines, Mauritius; EMEA: Czech Republic, Romania, Poland, Slovakia, Norway, Italy, Spain, the UK

Proprietary tools and technologies

- **MyConcerto**: an insight-driven, integrated platform that houses our industry-specific partner platforms and helps our clients on their journey to continuously innovate and create value leveraging our intelligent and automated tools.
- **Intelligent Supply Chain Platform**: a single platform, with access to over 50 AI apps, that helps to deliver applied intelligence micro-services (ZBS / procurement, intelligent planning, intelligent logistics, intelligent manufacturing) to our clients, securely at speed and scale.
- **SynOps**: Human-Machine and Data orchestration platform that synthesizes data, applied intelligence, and digital technology for intelligent execution of Accenture's supply chain operations services, securely at speed and scale, and optimize client business outcomes.

"Live" supply chain solutions designed to make supply chains adaptive and resilient, resembling living organisms' ability to sense, reason, respond, and evolve to uncertainties

Dimension	Rank
HFS Top 10 position	**#3**
Ability to execute	
Scale and experience	#4
Breadth and depth of offering	#3
Geographic client portfolio	#3
Delivery excellence	#4
Expertise	#3
Innovation capability	
Strategy and vision	#4
Investments and partnerships	#3
Technology innovation	#3
Collaboration	#4
Voice of the customer	**#1**

Strengths

- **Integrated supply chain offerings**. Infosys brings together strategy consulting, managed services, and digital solutions capability to support different areas of the supply chain.
- **Strong narrative on the digital supply chain**. Infosys has developed twenty-five "Live" supply chain solution offerings that help clients to transform their supply chain operations. These solutions leverage emerging technologies like AI, machine learning, automation, and blockchain to enable the supply chains to be "life-like". Live Supply Chains are built on a six-layered architecture that harnesses cloud-native ecosystems and data-driven insights.
- **Investments in IP.** Infosys' Epoch Solution (Extensible Pre-Configured Omni Channel Hub) focuses on retail e-commerce enterprise transformation journeys and rapid rollout of omnichannel fulfilment capabilities. The latest version, EPOCH 4.0 includes 100+ microservice-based cloud Native/ Ready OMS solutions. It is also infusing other internal IP (such as Infosys NIA AI Platform, TradeEdge, and AssistEdge) into its supply chain offerings.
- **Partner++ ecosystem** to augment Infosys IP with best-of-breed partner solutions and bring an ecosystem sandbox to its clients leveraging partners such as IBM, Blue Yonder, SAP, and Oracle
- **Client kudos** for strong technical capabilities, responsive and overall delivery excellence.

Development opportunities

- **Focus on creating more mindshare with clients as a business centric solution provider.** While the narrative has moved towards being business centric than being completely technology-centric, in order to correct market perceptions, Infosys should ensure its marketing, engagement, and sales process match the demand of business-oriented problems to ensure it gets the most mindshare. One of the clients perceived that Infosys could bring in more business centric knowledge in warehousing to help with proactive consulting solutions.
- **Opportunity to push the client boundaries for innovation.** Infosys can further co-invest with its clients on SCM innovation and help clients scale up their AI and automations programs.

Acquisitions and partnerships

- **Recent SCM Related acquisitions:**
- **Simplus:** Salesforce consulting (2020)
- **Blue Acorn iCi:** A customer experience company (2020)
- **Eishtec:** A customer service provider (2019)
- **HIPUS:** A procurement JV with Panasonic, Hitachi and Pasona in Japan (2019)

Partnerships:
- Oracle (eBS, JDE, PSFT, SCM Cloud, NetSuite, Demantra, OTM/GTM, WMS Cloud), IBM (Cloud, Sterling, Commerce, IBM Maximo, IBM TRIRIGA, Watson, Supply Chain Insights), Microsoft, Blue Yonder, QUINTIQ, Lamasoft, LOGILITY, o9 Solutions, SAP-ARIBA, Jaggaer, Coupa, Manhattan, Demandware, SAP Hybris, High jump, INFOR, Locanis, Kinaxis, iSCALA, IFS, Broadcom, MuleSoft, CelonisSAP

Client portfolio

Total no. of Supply chain clients: 1,300, including:
- Mazda
- Cisco
- Adidas
- USG Boral
- Syngenta

Client geography mix:
- NA: 37%
- Europe: 34%
- Middle East: 6%
- Middle East: 1%
- APAC: 20%
- Latin America: 2%

Client industry mix:
- Retail, VPG and Logistics: 18%
- Manufacturing: 22%
- CMT: 14%
- Pharms and Life science: 8%
- Financial service: 13%
- E&U: 13%
- Aerospace and defense: 3%
- Industrial equipment: 4%
- Other (THL, Banking, chemical): 5%

Service delivery operations

Total Headcount for Supply Chain Services: 25,000+ FTEs

Specify delivery locations: support clients from 45+ countries across the globe. Service delivery locations are the United States, Australia, Canada, Mexico, Netherlands, Puerto Rico, United Kingdom, Philippines, China, Czech Republic, Poland, Singapore, Ireland, and India

Proprietary tools and technologies

- Infosys Epoch Solution
- Order Source Optimization
- Route Optimizer
- Infosys Resource Optimizer
- Logistics Control Tower
- Order Delay Predictor
- Demand Forecasting
- Global Inventory Visibility

HFS Research

TOP 10

Consulting-led, end-to-end SCM offerings to deliver resilient, adaptable, purpose-driven, and future-ready supply chains

Dimension	Rank
HFS Top 10 position	**#4**
Ability to execute	
Scale and experience	#2
Breadth and depth of offering	#1
Geographic client portfolio	#4
Delivery excellence	#1
Expertise	#2
Innovation capability	
Strategy and vision	#2
Investments and partnerships	#6
Technology innovation	#4
Collaboration	#3
Voice of the customer	**#8**

Strengths

- **Consulting-led end-to-end services portfolio** including technology and platform support services, business operations, and infrastructure services.
- **TCS CogniX™ powered by MFDM (Machine First Delivery Model)** is an AI Driven Human-Machine collaboration suite that brings intelligence and automation through technologies like Advanced Analytics, Machine learning (ML), Robotics, Embedded Devices, Hybrid Cloud, Agile & DevOps, Immersive Experience, and IoT.
- **Industry specific solutions** across retail Cognitive Supply Chain Solution which include - (Network Design and Node Ranging, Hyper-automated Node & Micro-Fulfilment, Smart Sourcing, Adaptive Forecasting, Omni Channel Operations, Accelerated Fulfilment & Last Mile Optimization, Inventory & Shrink Optimization, Returns Optimization, Workforce Optimization, SC Visibility & Control, SC Cognitive Ops Studio) and CPG (Integrated Distributor Management & Collaboration Platform, Integrated Vendor Management System, Enterprise Visibility Platform and Planning as a Service).
- **Client kudos** for high quality services, partnership, and technology solutions.

Development opportunities

- **Driving innovation.** Despite its strong IP and solutions portfolio, TCS is perceived as a vendor that is good at executing projects rather than driving innovation.
- **Explore more of inorganic growth lever that can augment the home-grown talent:** Though TCS' homegrown talent and capabilities leveraging the larger TCS organization and collaborating with Tata group companies works well, it can also explore more on acquiring niche firms to either complement or supplement its supply chain capabilities.

Acquisitions and partnerships

Recent SCM Related acquisition:
- None

Partnerships:
- SAP (Gold partner), SAP Ariba, Oracle, Blue Yonder, Coupa, Infor, O9, E2Open, Kinaxis, Logility, Anaplan, Llamasoft, Tego, Celonis, Ivalua, DDTECH, Kuebix, Integration Point, TransPlace, Vendavo, OMP, Vistex, IBM CPLEX, Manhattan Associates, DASSUALT SYSTEMES, QAD

Client portfolio

Total no. of Supply chain clients: 850, including:
- US Based Home & Personal Care Major
- Global Confectionary Major, Global F&B Company
- Global Toys & Entertainment company and Large Tobacco Company
- DOW Chemicals
- Global beverages & brewing Co.

Client geography mix:
- NA:51%
- Europe: 31%
- Middle East: & Africa: 2%
- APAC:14%
- Latin America: 2%

Client industry mix:
- Automotive: 10-15%
- Industrial Machinery/Equipment: 10-15%
- Aerospace and Défense: 5-10%
- High Tech: 10-15%
- Consumer Products: 5-10%
- Process: 5-10%
- Life Sciences / Medical Devices: 10-15%
- Retail: 10-15%
- Others (including Energy, Utility, Transportation, BFSI, Communications & Media, Government/ Public Sector, and Telecom): 10-15%

Service delivery operations

Total Headcount for Supply Chain Services: 40,000-45,000 FTEs

Specify delivery locations: 183 Delivery Centers across
- UK and Ireland 17 Delivery Centers
- Latin America 15 Delivery Centers
- North America 14 Delivery Centers
- Asia Pacific 11 Delivery Centers
- Europe 3 Delivery Centers

Proprietary tools and technologies

- TCS Supply Chain Operations Tower
- iWFM (Intelligent Workforce Management)
- Supply Chain Digital Twin
- TCS Robologistics
- Machine First Inventory Analytics Workbench
- Accelerated and Pre-emptive Fulfilment
- ignio™ Cognitive Procurement proprietary solution
- SAP Blockchain enabled Forestry industry SCM solution
- TCS Cognix™ for Supply Chain: AI-driven human-machine collaboration suite, powered by MFDM™. It includes industry and business-specific assets, tools, and accelerators, including a library of BOTs, AI algorithms, and platforms and other digital solutions.
- TCS Digifleet™
- iDMCP (Integrated Distributor Management & Collaboration Platform)
- TCS Dynachain™: a multi-enterprise Ecosystem Commerce Platform for Digital cognitive autonomous supply network management

HFS Research

TOP 10

Building intelligent supply chains leveraging exponential technologies

IBM

Dimension	Rank
HFS Top 10 position	**#5**
Ability to execute	
Scale and experience	#5
Breadth and depth of offering	#7
Geographic client portfolio	#6
Delivery excellence	#5
Expertise	#6
Innovation capability	
Strategy and vision	#5
Investments and partnerships	#5
Technology innovation	#5
Collaboration	#6
Voice of the customer	**#4**

Strengths

- **One IBM approach in line with HFS'S OneOffice mindset** allows IBM to bring together all its capabilities across cognitive process transformation, cloud and application innovation, enterprise applications, global technology services, IBM Sterling, IBM blockchain, IBM security, and RedHat.
- **Intelligent Workflow aligned HFS Triple-A Trifecta** of Automation, AI, and Analytics provides IBM the ability for end-to-end supply chain transformation.
- **Bringing exponential technologies** to supply chain such as Blockchain, IoT, and Quantum as well as championing open supply chain innovation through investments like RedHat.
- **Innovation mindset**. IBM leverages IBM Garage methodology and approach to drive client innovation. It also enables clients to develop the competencies in-house to Co-Create, Co-Execute, and Co-Operate new business competencies.
- **Client kudos** for deep talent pool, hand—on style, and infusing new technologies in SCM

Development opportunities

- **Overcoming organization complexity to improve agility and responsiveness**. Despite commendable efforts around pursuing a OneIBM approach, client feedback suggests that IBM needs to find an effective way to choose the right set of talent across the IBM pool when forming the supply chain teams and working with clients.
- **Flexibility.** Clients expect IBM to demonstrate greater pricing flexibility and co-investments to support client transformation initiatives.

Acquisitions and partnerships

Recent SCM Related acquisition:
- **RedHat:** A hybrid multi-cloud provider (2019)

Partnerships:
- JDA/BlueYonder, Kinaxis, Llamasoft, o9, OMP, Manhattan, Microsoft, Oracle, SAP, Celonis

Client portfolio

Total no. of Supply chain clients: Have worked more than 1,000+ "services" client engagements, including:
- Large Telco
- Large US Food and Beverage Company
- Food Services Company
- Aerospace and defense company
- Food Product Company

Client geography mix:
- NA:46%
- Europe: 25%
- Middle East: 1%
- Africa: 1%
- APAC:23%
- Latin America: 5%

Client industry mix:
- Retail, Consumer Products, Travel and Transportation: 35%
- Automotive, Electronics, Oil & Gas: 24%
- Telco, Media & Entertainment: 15%
- Financial Services: 5%
- Public (HCLS, State, Local, Education.): 21%

Service delivery operations

Total Headcount for Supply Chain Services: NA

Specify delivery locations: IBM is a global operation with delivery across 6 continents in over 100 countries

Proprietary tools and technologies

- FOAK tools and platforms
- Blockchain-based solutions across a variety of industry specific use cases, such as IBM FoodTrust, TradeLens, and Trust Your Supplier
- Advanced control tower capabilities for end-to-end visibility across the supply chain

HFS Research

TOP 10 HFS

Domain-led digital assets to help supply chain clients from design to transform to managed services, translating to responsibility for results

Dimension	Rank
HFS Top 10 position	**#6**
Ability to execute	
Scale and experience	#9
Breadth and depth of offering	#5
Geographic client portfolio	#10
Delivery excellence	#3
Expertise	#5
Innovation capability	
Strategy and vision	#9
Investments and partnerships	#5
Technology innovation	#10
Collaboration	#3
Voice of the customer	**#5**

Strengths

- **Barkawi Consutling acquisition** enables Genpact to deliver to clients global, end-to-end supply chain services bolstered by domain, digital, and data science expertise.
- **Domain expertise**. Genpact's process heritage in combination with Barkawi's SCM expertise allows it to offer a "process-first" agile approach to improve core supply chain processes, increasing the overall resilience and automation capability. The company focuses strongly on offerings across integrated planning and execution in supply chain function.
- **Digital assets**. Genpact's supply chain "Maestro" offers a framework, approach, and technology accelerators to enable a hyperconnected supply chain. It acts as an orchestrator of services with internal intelligence to enable higher supply chain performance and resilience.
- **Focus on business outcomes**. Genpact follows the "Vision to Value" approach for business impact and business value realization. For instance, it developed an Integrated Planning & Execution target operating model that is focused on addressing challenges around On Time in Full (OTIF) for the CPG industry.
- **Client kudos** for strong practitioners, operational experience, and driving results.

Development opportunities

- **Potential to explore synergies between procurement and supply chain** beyond indirect category management and transactional P2P especially around direct material and demand management.
- **Focus on horizon 3 technologies.** While Genpact has made robust investments in the Triple-A Trifecta (AI, analytics, and process automation) and is expanding presence Cloud, the SCM space is a hotbed for other emerging technologies such as blockchain and IoT where Genpact lacks capability.

Acquisitions and partnerships

Recent SCM Related acquisition:
- **RightPoint:** Firm focused on delivering digital transformation (2019)
- **Barkawi Management Consultants**: A leading supply chain management consultancy (2018)
- **Rage Framework:** A knowledge-based automation technology firm (2017)

Partnerships:
Genpact has R&D partnerships with 9 supply chain software partners & 27 technology partners in supply chain. Following are some of the key partners:
- **Anaplan:** Market leader in cloud-based planning software for finance, sales, marketing, IT and operations.
- **Kinaxis**: Supply chains are transforming through digital innovation
- **Academic Partnerships:** Institute of Management Technology (IMT), Calcutta University, Jadavpur University, ICFAI Business School, BITS Pilani, Amrita University, Manipal Global Academy of Data Science, UpGrad, Rutgers University, NJ
- Genpact and Northwestern University Join Forces to Deliver Innovative New Master's Program in Artificial Intelligence

Client portfolio

Total no. of Supply chain clients: 150, including:
- Global Provider of Electrical Power Integrated System
- Largest global aircraft manufacturer and the 2nd largest defense contractor in the world
- Automobile Ancillary parts Supplier
- British multinational automotive company
- Leading global healthcare company
- Leader in specialty chemicals and materials

Client geography mix:
- NA: 55%
- Europe, Middle East, Africa: 30%
- APAC: 10%
- Latin America: 5%

Client industry mix:
- CPG: 25%
- Retail: 5%
- Life science: 20%
- Hi-tech: 15%
- Aerospace: 10%
- Motor vehicle: 10%
- Heavy equipment: 15%

Service delivery operations

Total Headcount for Supply Chain Services: 7,000+

Specify delivery locations: 24 Delivery center across Uberlandia, Dalian, Brno, Ostrava, Client Sites, Guatemala City, Bangalore, Gurgaon, Hyderabad, Jaipur, Kolkata, Noida, Kuala Lumpur, Nairobi, Juarez, Wormer, Manila, Krakow, Lublin, Szczecin, Bucharest, Cluj, Wilkes-Barre, Danville, Chicago

Proprietary tools and technologies

- **SCRTM Platform:** Genpact's cloud-based platform that helps clients measure and improve Customer Experience (CX) through a "Data to Insights to Action" methodology.
- **OMVA:** Digital enabled solution that allows an Order Management team to make better real time decisions around order exceptions. O
- **Digital SEP (DSEP):** OM-DSEP framework provides Design Thinking led reimagined Order Management (OM) outcomes that are realizable by a combination of Genpact' s Smart Enterprise Processes (SEP) and Digital technology solutions

HFS **Research**

TOP 10

Driving frictionless supply chains leveraging integrated and autonomous operations

Capgemini

Dimension	Rank
HFS Top 10 position	#7
Ability to execute	
Scale and experience	#10
Breadth and depth of offering	#10
Geographic client portfolio	#11
Delivery excellence	#8
Expertise	#8
Innovation capability	
Strategy and vision	#8
Investments and partnerships	#4
Technology innovation	#7
Collaboration	#7
Voice of the customer	#5

Strengths

- **Frictionless supply chain vision aligned with HFS OneOffice mindset.** Capgemini's frictionless end-to-end supply network vision includes integrated and autonomous operations that remove the enterprise functional silos to deliver the next-generation of enterprise-level outcomes and become a frictionless enterprise.
- **Altran acquisition** allows Capgemini to support industrial and tech players in their digital transformation through the integration of information technologies (IT) and operational technologies (OT) automation.
- **Triple-A trifecta (Automation, Analytics, and AI) driven go-to-market** with assets across supply chain planning, order fulfilment, master data management, logistics, control tower, visibility, analytics, and procurement.
- **Holistic transformation approach**. Capgemini leverages its ESOAR methodology (Eliminate, Standardize, Optimize, Automate, and Robotize) to transform the client supply chain landscape through smart automation, redirecting resources from repetitive tasks toward higher-value business activities and driving best practice. Capgemini also leverages its digital operating model (Digital Enterprise Model D-GEM) to go beyond technology to review and validate the impact it has on an organization, its people, and its capabilities.
- **Co-innovation with clients**. Capgemini adopts an "automation-first" approach and leverages its innovation and solution centres including the Applied Innovation Exchange (AIE) and Accelerated Solutions Environment (ASE) to help clients build next-generation solutions across different supply chain areas. Additionally, the company offers innovative solutions for quick payoff through its small tech proprietary tools and platforms to fix the specific supply chain problem for clients quickly, and enable intelligent planning.
- **Client kudos** for supply chain knowledge and experience.

Development opportunities

- **Leveraging broader Capgemini capabilities and proactively suggest innovative solutions.** Clients referenced lack of ability to pull innovation from the broader Capgemini group into the client team. Also, while clients rate Capgemini strongly on execution, they feel that Capgemini can proactively suggest innovation in strategic area such as supply chain planning.
- **Frictionless enterprise requires more client education.** While the frictionless enterprise concept resonates with the HFS OneOffice, clients don't fully understand how Capgemini will drive a frictionless supply chain. It is a fresh and powerful narrative but one that requires more client education.

Acquisitions and partnerships

Recent SCM Related acquisition:
- **Altran:** A leading provider of Engineering and R&D services (2020)

Partnerships:
- Blue Yonder (JDA), Kinaxis, Anaplan, O9, SAP, Oracle, Llamasoft, Manhattan, IBM Sterling, Aera, Mi9, PTC, Dassault, Siemens, Symphony, Antuit, E2Open, InforNexus, Tradeshift, iValua, icertis, Beeline, Zendesk, Pega, ServiceNow, Celonis, Minit, Clearmetal

Client portfolio

Total no. of Supply chain clients: Not disclosed

Marquee clients include:
- Unilever
- Syngenta
- SC Johnson
- International Pharmaceutical Company
- Leading Aerospace/Defense Firm
- Global Beverage Firm

Client geography mix:
- NA: 42%
- Europe: 40%
- Middle East: 1%
- APAC: 12%
- Latin America: 5%

Client industry mix:
- CPRD: 36%
- MALS: 38%
- Services, Utilities, Technology: 16%
- EUC: 12%

Service delivery operations

Total Headcount for Supply Chain Services: 5,050 FTEs

Specify delivery locations: 19 Delivery Centers across USA, Canada, Mexico, Brazil, Guatemala, The Philippines, India, China, Japan, Australia, UK, Ireland, The Netherlands, Poland, Germany, Belgium, Austria, Switzerland, France

Proprietary tools and technologies

- Digital Global Enterprise Model (D-GEM) platform
- The Integrated Planning & Execution (IP&E) framework
- Control Tower (Spend, Inventory, Order, Logistics) Insights 360
- Capgemini 890
- Capgemini's Intelligent Automation Platform (CIAP)
- Innovation and Promotion forecasting tool
- S&OP Maturity Model
- Consumer-Driven Supply Network framework
- Set of proprietary small tech digital enablers

HFS Research

TOP 10

Integrated digital portfolio of SCM offerings to meet the new level of expectations from the supply chain

Dimension	Rank
HFS Top 10 position	#8
Ability to execute	
Scale and experience	#6
Breadth and depth of offering	#6
Geographic client portfolio	#8
Delivery excellence	#6
Expertise	#7
Innovation capability	
Strategy and vision	#6
Investments and partnerships	#8
Technology innovation	#8
Collaboration	#8
Voice of the customer	#7

Strengths

- **Integrated Digital Portfolio** that aims to provide seamless offerings across Customer Experience, Business and Process Consulting, Business Agility, Change Management, Application Modernization, SaaS Platforms, Automation, Modern Application Development, Cloud Native Solutions, Business Productivity, Automation, Data, Analytics and AI.
- **Inorganic strategy to build a services + product portfolio.** Key acquisitions include DWS Stone Bridge Envision, IBM Suite of products, Actian, Datawave, H&D international, PowerObjects, C3I, Volvo IT, and Geomatric.
- **Strong Partnership and Alliances Ecosystem:** HCL has built strong partner ecosystem with dedicated ecosystem units for Microsoft, GCP,AWS, IBM etc. It has invested in building digital Supply chain specific partners – Blue Yonder, SAP, Infor, LLamasoft, Oracle, Logility, Anaplan, and Manhattan. It is also invested in future of technologies with its Silicon Valley ecosystem through Morado Ventures, Storm Ventures, Sumeru Equity Partners and Andreessen Horowitz (a16z) ventures.
- **Delivering Supply chain solutions at Scale.** HCL has developed FENIX 2.0 Digital Prioritization Framework with integrated design thinking methodology called Nexus. FENIX2.0 also comes with ADvantage suite of HCL's in house solution offerings including Consult to Operate Framework.
- Client kudos for domain experience, strong industry vertical propositions, customer service, account management, and flexibility.

Development opportunities

- Need to create a stronger GTM strategy to take HCL's Integrated Service offerings to generate better value for their customers
- Reference clients rate HCL's domain and technical capabilities highly but would like to see more end-to-end engagement ownership to bring disruptive ideas to execution

Acquisitions and partnerships

Recent SCM Related acquisition:
- **DWS Limited:** Business and management consulting group (2020) in ANZ
- **Strong Bridge Envision:** US based digital transformation consulting firm (2020)
- **IBM products:** HCL has taken full ownership of the R&D, sales, marketing, delivery, and support for 50+ products including UrbanCode, BigFix, Workload Automation, Forms Experience Builder (2019)

Partnerships:
- Microsoft, IBM and RedHat , GCP, AWS, Salesforce, SAP, Oracle, Blueyonder Llamasoft, Kinaxis, Anaplan
- **Process Mining Tools** - Celonis, Aeris
- **Robotics Process Automation** - Automation Anywhere, Blue Prism, UiPath and others
- **E-Procurement Tools** - Zycus, OptSource, Coupa
- **Contract Management Tools** - Sirion Labs

Client portfolio

Total no. of Supply chain clients: 220, including:
- American Multinational Food Processing and Commodities Trading Corp.
- Global Document Outsourcing and Digital Printing Solutions Provider based out of US
- US-based Leading Convenience Retail Giant
- Germany based Global Market Leader in the Logistics Industry

Client geography mix:
- NA:58%
- Europe: 31%
- Latin America: 1%
- Middle East: 0.5%
- APAC:9%
- Latin America: 0.5%

Client industry mix:
- Manufacturing & Logistics:31%
- Healthcare and Life Sciences: 21%
- Retail: 15%
- CPG: 13%
- Energy and Utility: 11%
- Others: 9%

Service delivery operations

Total Headcount for Supply Chain Services: 13,404 FTEs

Specify delivery locations: We have delivery centers and 55+ co-innovation labs across the globe in 50 countries.

Proprietary tools and technologies

- **FENIX 2.0:** HCL's industry aligned execution framework to help organizations reprogram their core DNA and realize their digital transformation objectives.
- **ExactoTM:** HCL's proprietary AI enabled, machine learning solution
- **SmartBuy**: HCL's SmartBuy is a cognitive procurement solution
- **Intelligent Linear Asset Monitoring (ILAM):** This is an IoT-led answer for a utilities industry pushed to the precipice of digital transformation
- **Spade**: Simplified Platform for Application Digital Enterprise Transformation,
- **Rapid Deployment Offerings (RDO) on Cloud:** Rapid Deployment Offering for Cloud projects which gives clear execution approach and adoption.
- **Accural Information:** Automated tool to take care of accrual reconciliation

Driving high-value outcomes for supply chain clients leveraging a global, industry-focused, and experienced team enabled by emerging technologies

pwc

Dimension	Rank
HFS Top 10 position	#9
Ability to execute	
Scale and experience	#7
Breadth and depth of offering	#8
Geographic client portfolio	#5
Delivery excellence	#10
Expertise	#10
Innovation capability	
Strategy and vision	#10
Investments and partnerships	#10
Technology innovation	#10
Collaboration	#9
Voice of the customer	#10

Strengths

- **Synergies with tax and risk assurance.** PwC's supply chain solutions extend beyond its advisory practice and into 285,000 people strong advisory, tax and risk assurance practices.
- **Industry-focused approach**. PwC's supply chain consultants are aligned with specific industry (such as industrial products, consumer goods, technology, and media, etc.) and function (such as supply chain planning, manufacturing execution, logistics, sourcing, etc.) to drive deep client relationships
- **Human-centric design**. Business Experience and Technology (BXT) agile approach uses a customer centric approach to align multiple perspectives and fosters stakeholder acceptance to augment value from supply chain investments
- **Talent investments.** PwC has made a $3 billion global investment in tools, technologies, and individuals to disrupt its business. It is providing its employees with the critical skills to help them develop now and in the future as infinite learners through digital upskilling.
- **Going "all in" with digital.** Over 100 digital assets in the form of automation, AI models, and Data Platforms, which can be scaled and used across lines of service and engagements. Within PwC this has helped to eliminate over 270,000 hours of manual effort.
- **Pre-Configured solutions** (SAP, Oracle, Microsoft, SalesForce, Coupa, among others) integrates industry best practices to deliver an 80% answer for its clients to speed up implementation and allow more time for value–added activities

Development opportunities

- **Potential to expand supply chain related managed services** such inventory management, MRP, control tower, indirect sourcing among others).
- **Supply chain sustainability services** (such as Carbon footprint management, traceability and transparency, ethical sourcing, legal and compliance advisory) an emerging area for PwC to strongly position its offerings as sustainability is among the top 3 priorities for supply chain units of organizations across the globe.

Acquisitions and partnerships

Recent SCM Related acquisition:
- None

Partnerships:
- SAP, Google, Oracle, Microsoft, Hewlett-Packard, Workday and SalesForce.com.
- Also manage a portfolio of Joint Business Relationships (over 2,000 to date) which are designed to provide access to niche skills.
- JBRs include Anaplan, Blue Yonder and many others

Client portfolio

Over 2,000 unique supply chain engagements annually

Client geography mix:
- NA: 45%
- Europe: 30%
- Middle East: 2.5%
- APAC: 15%
- Latin America: 5%

Focus industries:
- Automotive
- Aerospace and Defense
- High Tech
- Consumer Products, including Food and Beverage
- Process
- Life Sciences / Medical Devices
- Retail

Service delivery operations

Total Headcount for Supply Chain Services: 5,000+ FTEs

Delivery locations: 5 Delivery center across Columbia, Bangalore Mumbai, China, and Kolkata

Proprietary tools and technologies

- Benchmarking 2.0
- Supply Chain Intelligence
- Factory Intelligence (FI)
- PwC SAP and Oracle Industry Edge
- Supply Chain Resilience Model
- Change Navigator
- Leading Enterprise Advisory Playbook (LEAP) tool
- BxT (Business, Experience, Technology) Agile

Pure-play supply chain and procurement solutions provider with unified consulting, software, and managed services

GEP

Dimension	Rank
HFS Top 10 position	**#10**
Ability to execute	
Scale and experience	#8
Breadth and depth of offering	#9
Geographic client portfolio	#7
Delivery excellence	#9
Expertise	#9
Innovation capability	
Strategy and vision	#9
Investments and partnerships	#11
Technology innovation	#9
Collaboration	#5
Voice of the customer	**#9**

Strengths

- **Unified and comprehensive portfolio of consulting, software and managed services** for supply chain and procurement is GEP's core differentiation. GEP's offerings focus on (i) network optimization (ii) integrated business planning (iii) supply chain technology assessment (iv) inventory optimization (v) supply chain risk and sustainability and (vi) service level or cost improvement.
- **GEP NEXXE™** provides cloud-based, AI-powered supply chain software for planning, procurement, inventory and warehouse management, supply chain collaboration, quality management, cost management, supply chain risk management and control tower.
- **Strong procurement capability.** GEP is a leader in the sourcing and procurement area of supply chain. Its procurement platform, GEP SMART™ is an AI-powered, cloud-native software for direct and indirect procurement that offers comprehensive source-to-pay functionality.
- **Focus on holistic value creation.** GEP engages with supply chain clients through a right mix of consulting and technology teams that focus on understanding how clients work and bring together fresh thinking and approach to problem solving by blending with the client's culture.
- **Investments in emerging and digital technologies**. GEP has a strong focus on AI, machine learning, predictive analytics, and IoT to provide gains in speed, productivity, and savings. GEP MINERVA™ is a portfolio of AI technologies that power GEP's software by providing predictive analytics, cognitive capabilities, and decision support tools.
- **Client kudos** for flexibility and strong skillset of team members to execute the project.

Development opportunities

- **Mindshare beyond sourcing and procurement.** GEP has a very strong, entrenched reputation and brand in procurement services that sometimes overshadows its supply chain capabilities in clients' minds.
- **Preference for in-house technologies.** While GEP does offer managed services on clients' legacy procurement technology, there is preference to offer in-house technology and services, limiting potential client opportunities. While GEP has started changing its approach, it needs to accelerate it.
- **Improving technology integration and implementation** of emerging technologies is cited as a common development opportunity by most GEP clients that HFS interviewed or surveyed.

Acquisitions and partnerships

Recent SCM Related acquisition:
- None

Partnerships:
- Microsoft, Tech Mahindra, Bahwan CyberTek, HCL Technologies, DXC Technology, Mena Solutions, RiseNow, Alpine Solutions Chain Solutions, Thomson Reuters ONESOURCE
- Rapid Ratings, Sovos, Ecovadis
- Global Risk Management Solutions, ExpensePath, Pendo.io, Yantra

Client portfolio

Total no. of Supply chain clients: 450, including:
- Chevron
- Petronas
- Bayer
- Leading Global Technology Company
- Global Consumer Products Company
- American Baked Foods Company
- Large European Healthcare Company
- American Electric Utilities Company

Client geography mix:
- NA: 35%
- Europe: 28%
- Middle East: 5%
- Africa: 5%
- APAC: 15%
- Latin America: 12%

Client industry mix:
- CPG: 25%
- Oil and Gas: 23%
- Technology: 12%
- Retail: 10%
- Others (Utilities, Pharma, Chemicals, etc.): 30%

Service delivery operations

Total Headcount for Supply Chain Services: 5,500+

Specify delivery locations: 21 Delivery center across Clark NJ, Toronto, Mumbai, Hyderabad, Prague, London, Dublin, Shanghai, Mexico City, Sao Paolo, San Jose, Singapore, Sydney, Frankfurt, Amsterdam, Kuala Lumpur, Centurion, Chicago, Houston, Japan, Atlanta

Proprietary tools and technologies

- **GEP NEXXE™,** AI-powered, cloud-based supply chain platform solutions with capabilities in planning, procurement, inventory and warehouse management, supply chain collaboration, quality management, cost management, supply chain risk management and Control Tower
- **GEP SMART™:** Unified, source-to-pay platform for direct as well as indirect procurement
- **GEP Minerva™:** Portfolio of AI technologies that power GEP's software by providing predictive analytics, cognitive capabilities, and decision support tools.
- **GEP Click™:** Cloud integration platform.

Digital supply chain solutions focused on realizing efficiency gains along the process

Atos

Dimension	Rank
HFS Top 10 position	#11
Ability to execute	
Scale and experience	#11
Breadth and depth of offering	#11
Geographic client portfolio	#9
Delivery excellence	#11
Expertise	#11
Innovation capability	
Strategy and vision	#11
Investments and partnerships	#9
Technology innovation	#11
Collaboration	#11
Voice of the customer	#11

Strengths

- **Inherent strength in manufacturing, retail & transportation verticals** accounting for more than a third of overall Atos' revenues.
- **Multiple supply chain solutions targeting specific problem statements** such as ICAM (material flow control), SISLOG (warehouse management), APADS (predictive analytics), supplier connect (integration with OEMs and suppliers), route optimization, and others.
- **Strategic partnership with Siemens:** Atos has Global strategic partnership with Siemens since 2011 with 330M Euro joint investments in digitally powered solutions. In 2020, Siemens and Atos announced a five-year extension of their strategic partnership to deliver digital, integrated and cybersecurity solutions.
- **Intelligent supply chain solution:** Atos and Siemens worked together to develop Intelligent Supply Chain solution which is a unique offering combining the strengths of Siemens AX4, Siemens MindSphere and Atos Codex offerings.
- **Strong European focus:** Europe accounts for nearly 50% of its supply chain client mix. Lots of global businesses of Atos are running through the headquarters of their Europe-based global clients, but the project delivery is done in North America (NA) or Asia-Pacific (APAC).
- **Strong innovation focus**: Atos follows an innovative approach and develops high-end technologies, products and its own IP that bring unique additional value in performance and security. It has 5000+ patents, and a R&D budget of €250M. It also has a network of 18 R&D labs in 9 countries.

Development opportunities

- **Focus on point solutions versus broad transformation.** Atos offers multiple point solutions across the value chain but can improve its end-to-end transformation narrative.
- **Business narrative.** Atos' supply chain value proposition is technology-centric. While technology is a key enabler to supply chain transformation, it requires capability orchestration across people, process, technology, data, and change management.

Acquisitions and partnerships	Client portfolio		Service delivery operations	Proprietary tools and technologies
Recent SCM Related acquisition: - **Miner & Kasch:** Data science firm (2020) **Partnerships:** - SAP, Siemens, Worldline, Microsoft, Google, Amazon, Dell, Worldline	**Total no. of Supply chain clients:** 200+, including: - Siemens - Swiss multinational pharmaceutical company - French multinational automobile manufacturer - Swiss multinational healthcare company - German automobile firm - British multinational consumer goods		**Total Headcount for Supply Chain Services**: 750 FTEs **Geographic delivery spread:** Atos has operations in 72 countries. It gathers global business units into 5 regional business units (North America, Central Europe, Northern Europe, Southern Europe, Growing Markets)	- SISLOG - ICAM - APADS - Intelligent Supply Chain - Supplier connect - Route Optimization - Shop Floor Track & Trace
	Client geography mix: - NA: 24% - Europe: 49% - RoW: 26%	**Client industry mix:** - NA		

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As an analyst, Saurabh leads the coverage for horizon 3 change agents such as blockchain, business services (such as finance & accounting, sourcing & procurement, and supply chain), as well as overarching and cross-cutting themes under the OneOffice concept and Hyperconnected Enterprise.

Ram has over 19 years of experience that spans strategy consulting, business development, and market research. In his current role in HFS, Ram works on custom research projects, consulting and syndicated research studies across various technologies and functional areas. As an analyst, Ram looks at supply chain, procurement, Industry 4.0, IoT and Banking & Financial Services.

HFS Research

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HFS Research

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About HFS Research

The HFS mission is to provide visionary insight into major innovations impacting business operations, including: automation, artificial intelligence, blockchain, Internet of things, digital business models, and smart analytics.
HFS defines and visualizes the future of business operations across key industries with our Digital OneOffice™ Framework.

HFS influences the strategies of enterprise customers to help them develop OneOffice backbones to be competitive and to partner with capable services providers, technology suppliers, and third-party advisors.

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