

# HFS Top 10 Supply Chain Service Providers

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*Excerpt for EY*



“The term ‘supply chain’ is a misnomer for meeting the realities of today's world. It connotes 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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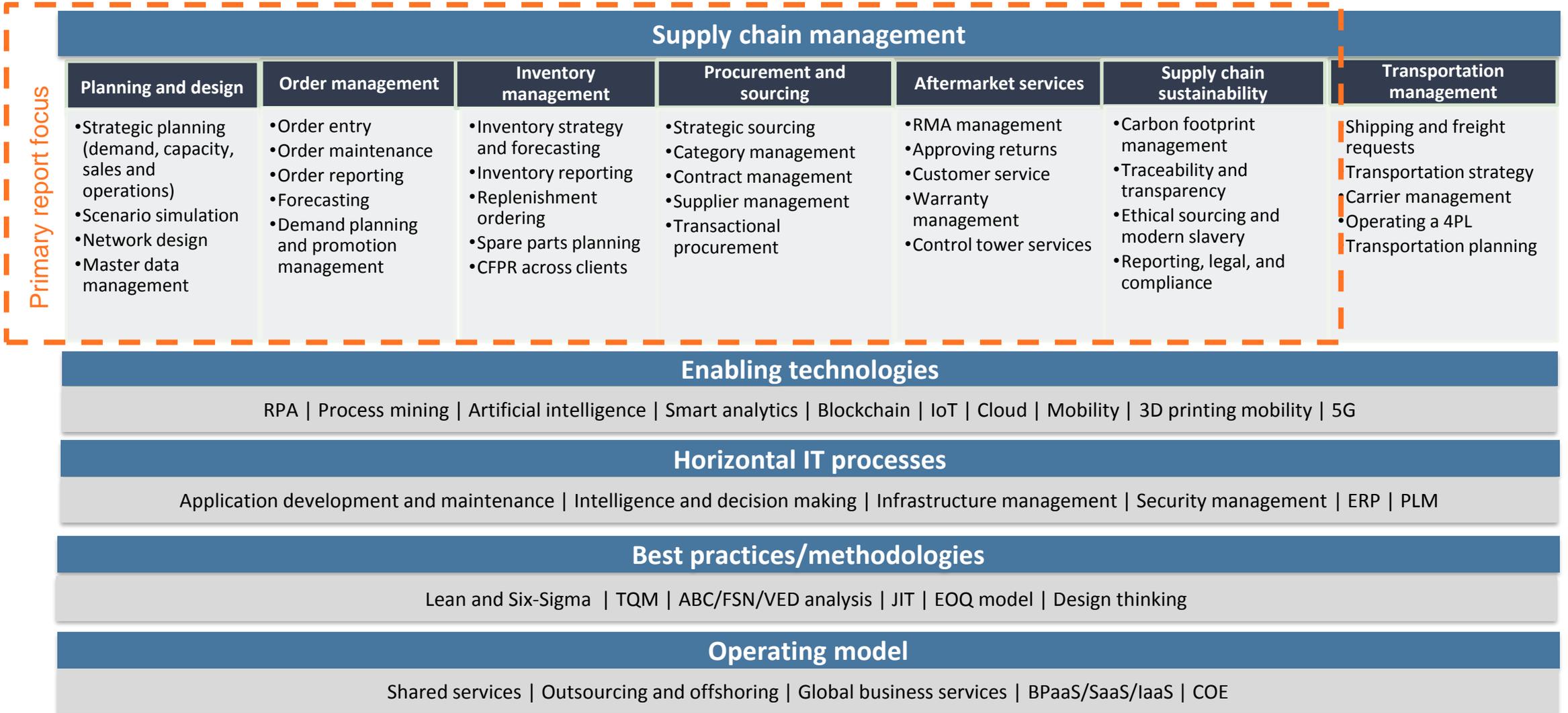


# Introduction

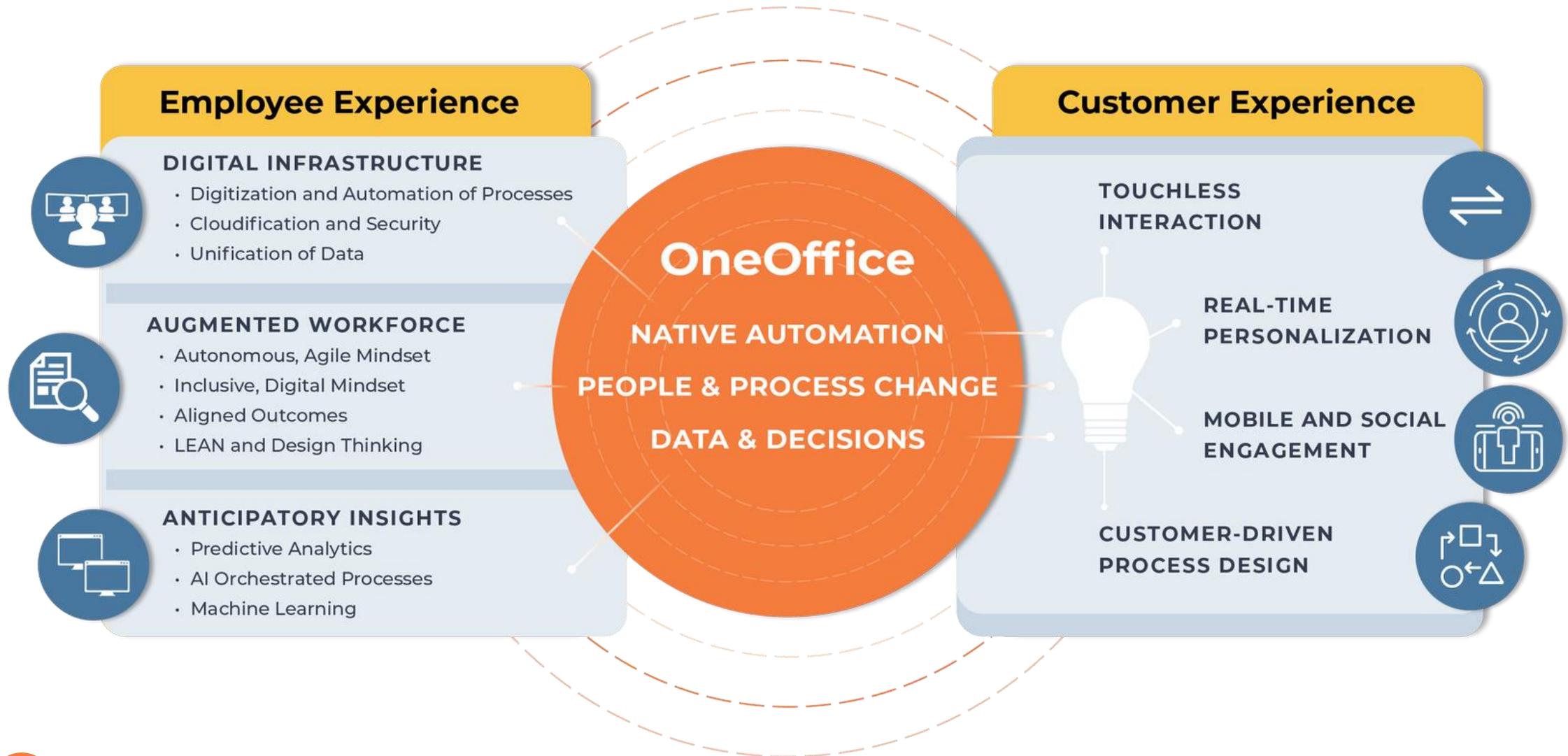
# Introduction

- 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



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

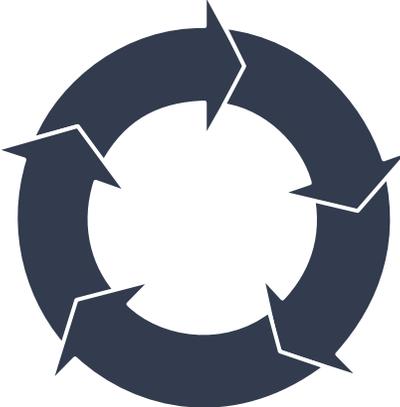


# COVID-19 accelerated the drive toward hyperconnected, autonomous supply chains

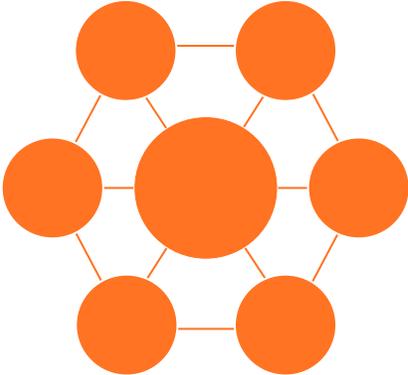
Traditional:  
Linear and siloed supply chain



Pre-COVID-19:  
Circular supply chain



Post-COVID-19:  
Hyperconnected autonomous  
supply chain



Converging organizational silos

Emergence of ecosystems



# Research methodology

# Supply chain service providers covered in this report

accenture

Atos

Capgemini

EY

GEP

genpact

HCL

Infosys

IBM

pwc

tcs  
TATA  
CONSULTANCY  
SERVICES

# 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%

- **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



## Ability to execute

33%

- **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



## Innovation capability

33%

- **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

# 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



# 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.

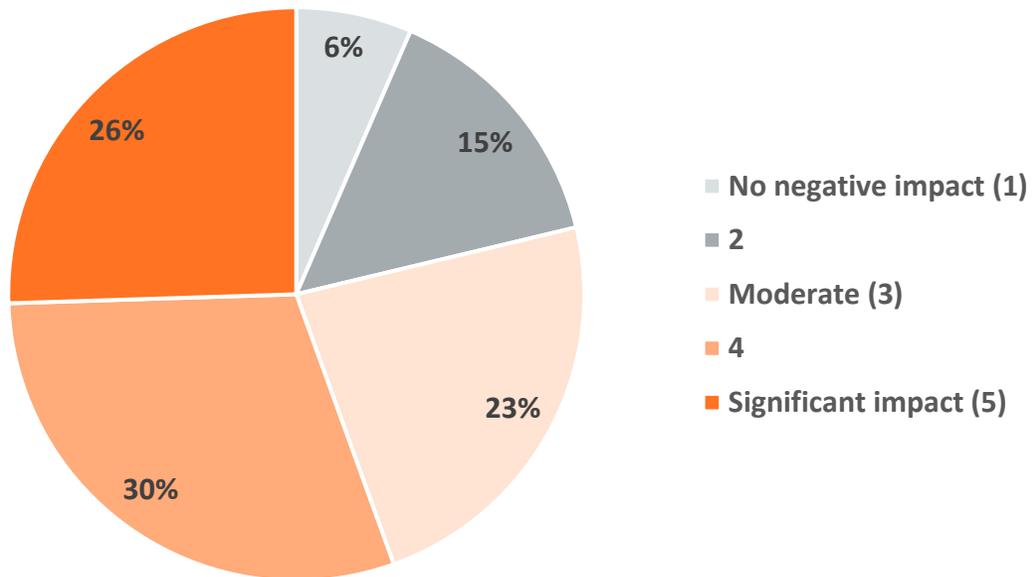
## Executive summary (2/2)

- **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.**

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

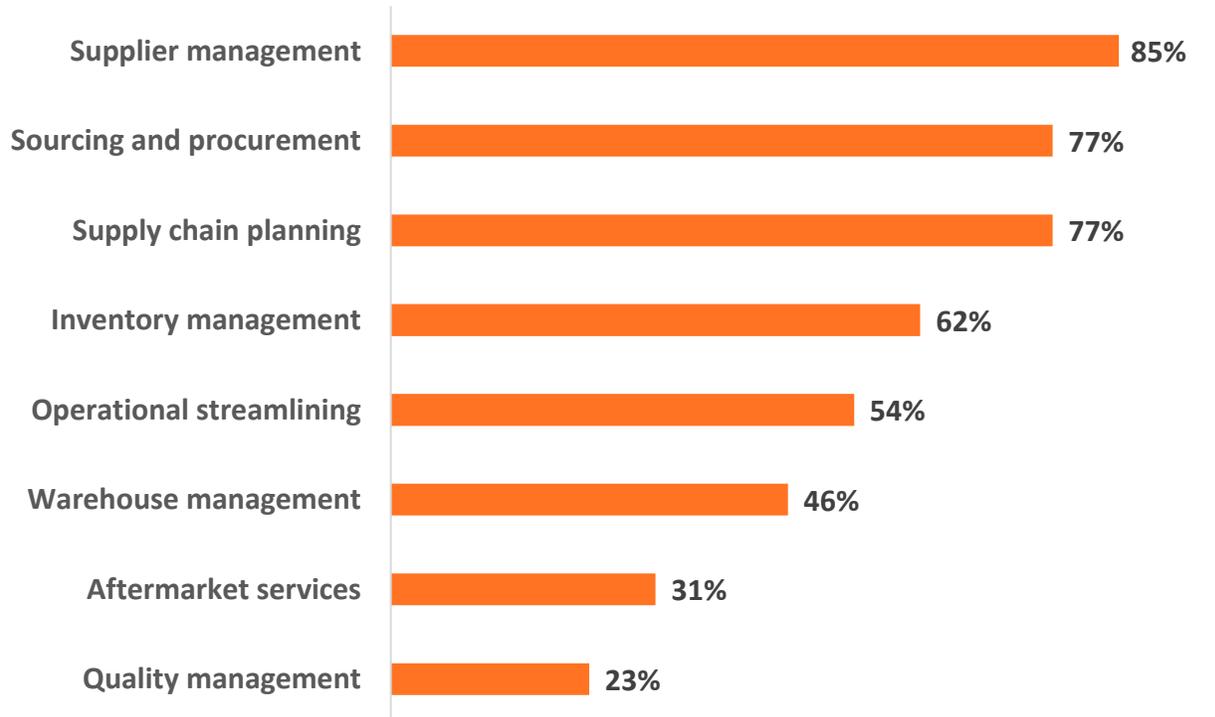
## To what extent was your supply chain negatively impacted by COVID-19?

Percentage of respondents on a scale of 1-5, where 1 = no negative impact and 5 = significant impact



Source: HFS Research, 2021  
Sample: 400 Global 2000 executives

## To what extent are each of following being negatively impacted by COVID-19? Percentage of respondents who indicated medium to significant impact

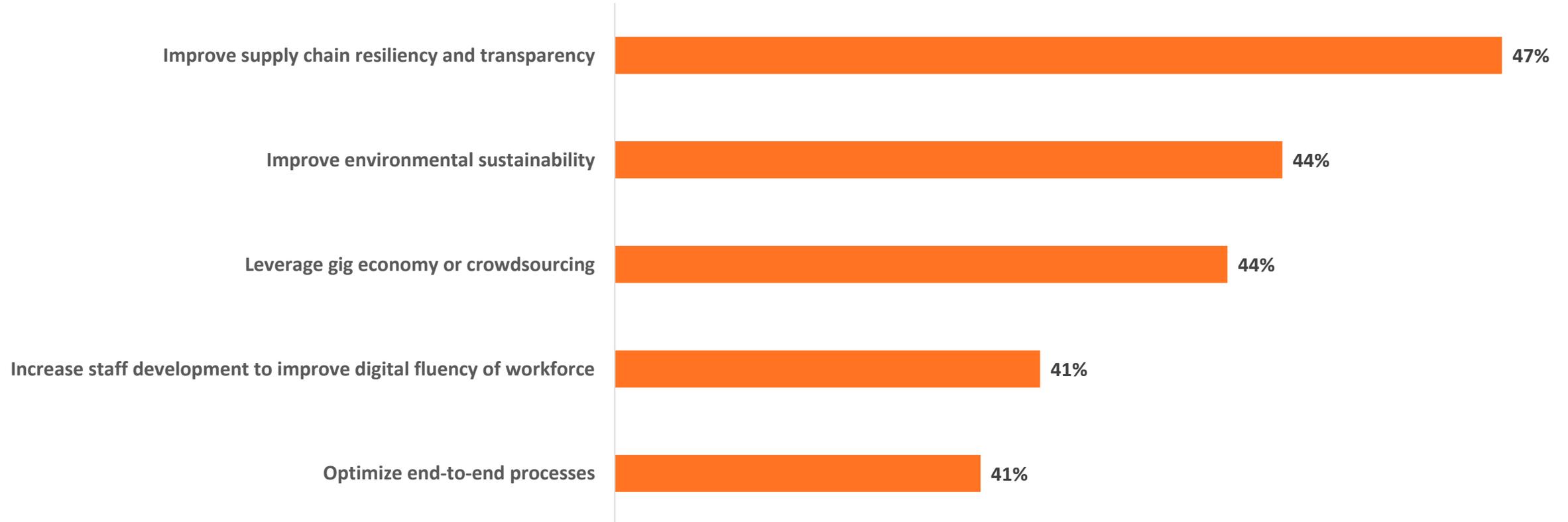


Sample: 21 supply chain client interviews

# 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



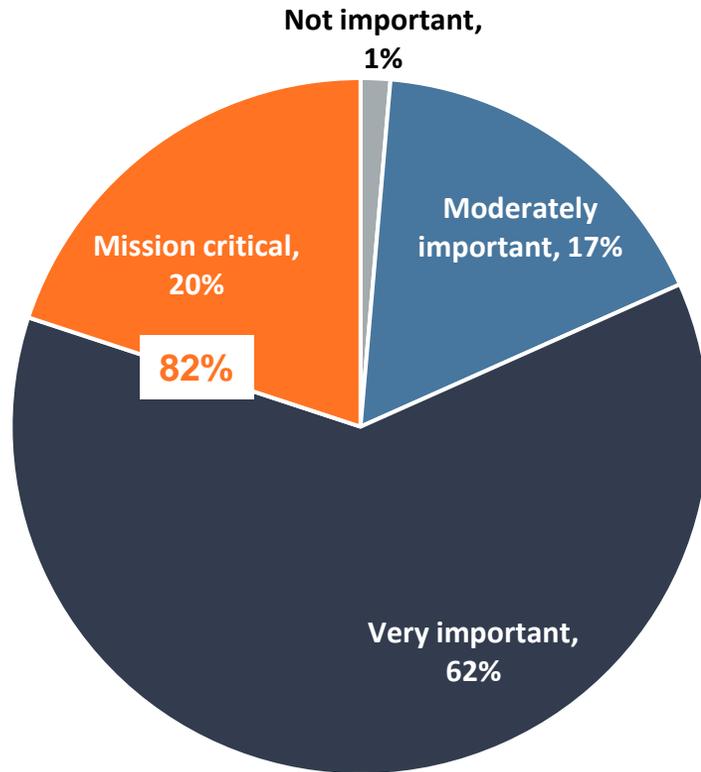
Sample: 200 supply chain, operations, and procurement respondents from Global 2000 enterprises

Source: HFS OneOffice Pulse Study, H1 2021

# Unchain your supply chain—adopt the OneOffice mindset

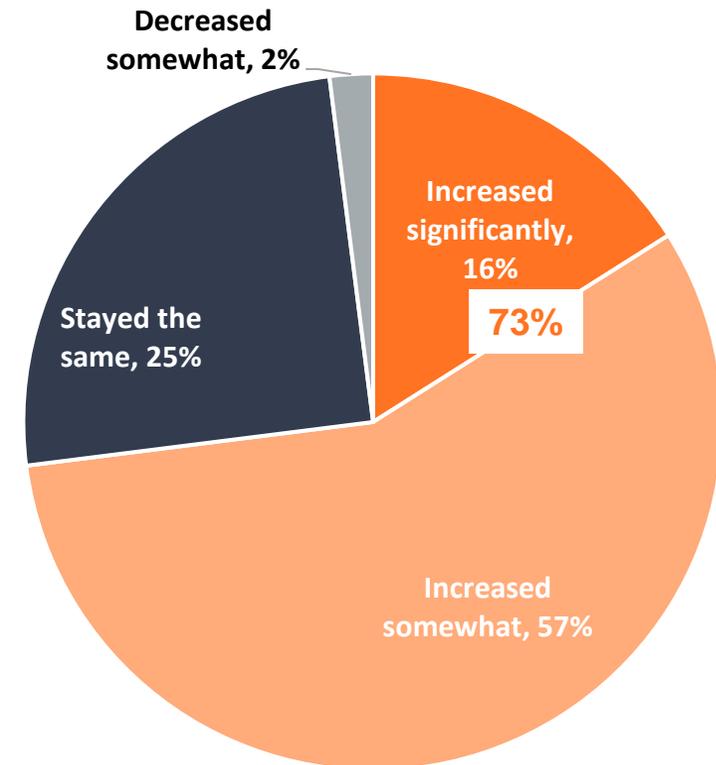
How important is it to drive a OneOffice mindset for your company's overall operation and strategy?

Percentage of supply chain respondents



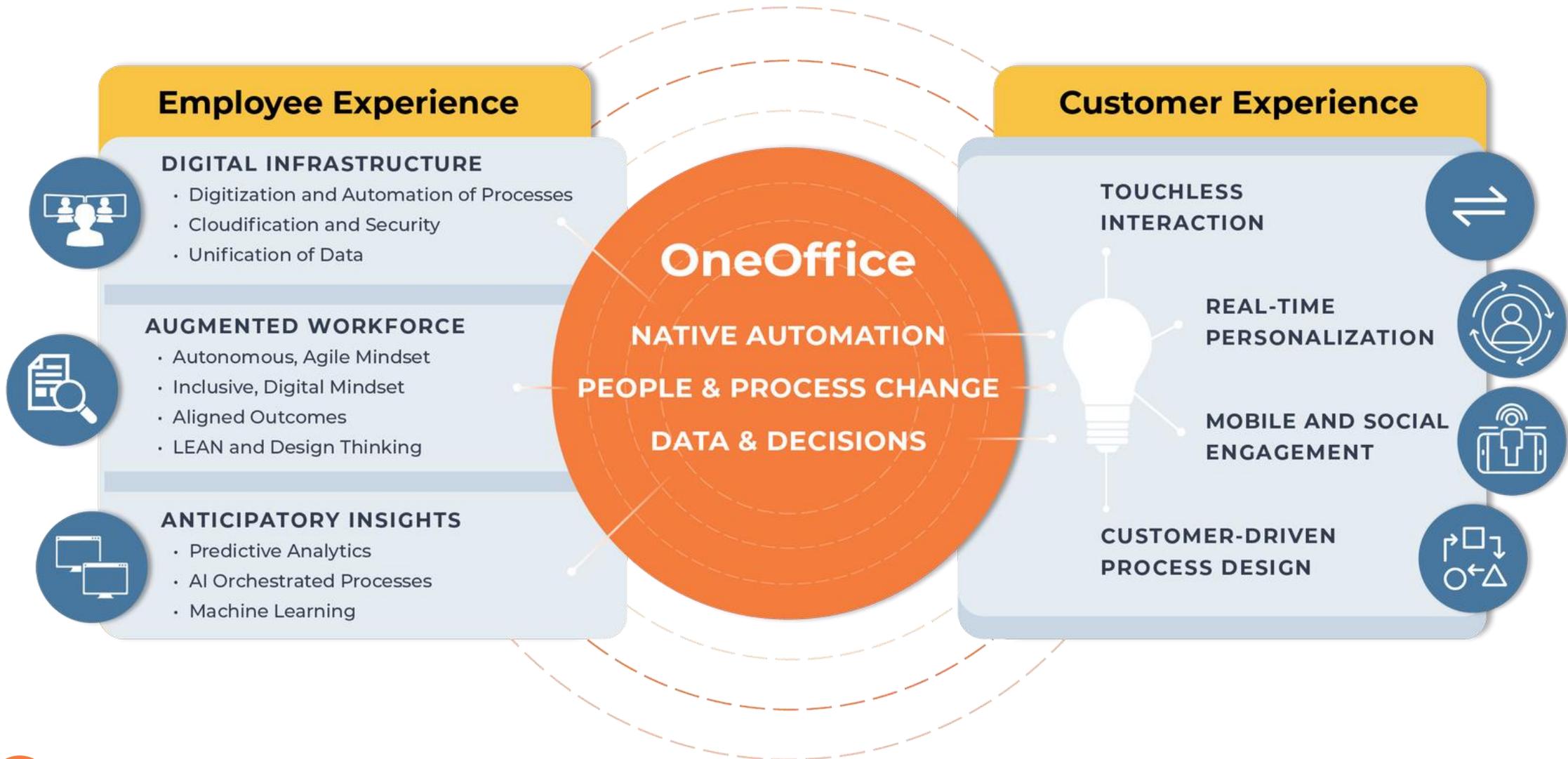
Has the importance of a OneOffice mindset increased or decreased since Q2 2020 (after the pandemic shock)?

Percentage of supply chain respondents



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

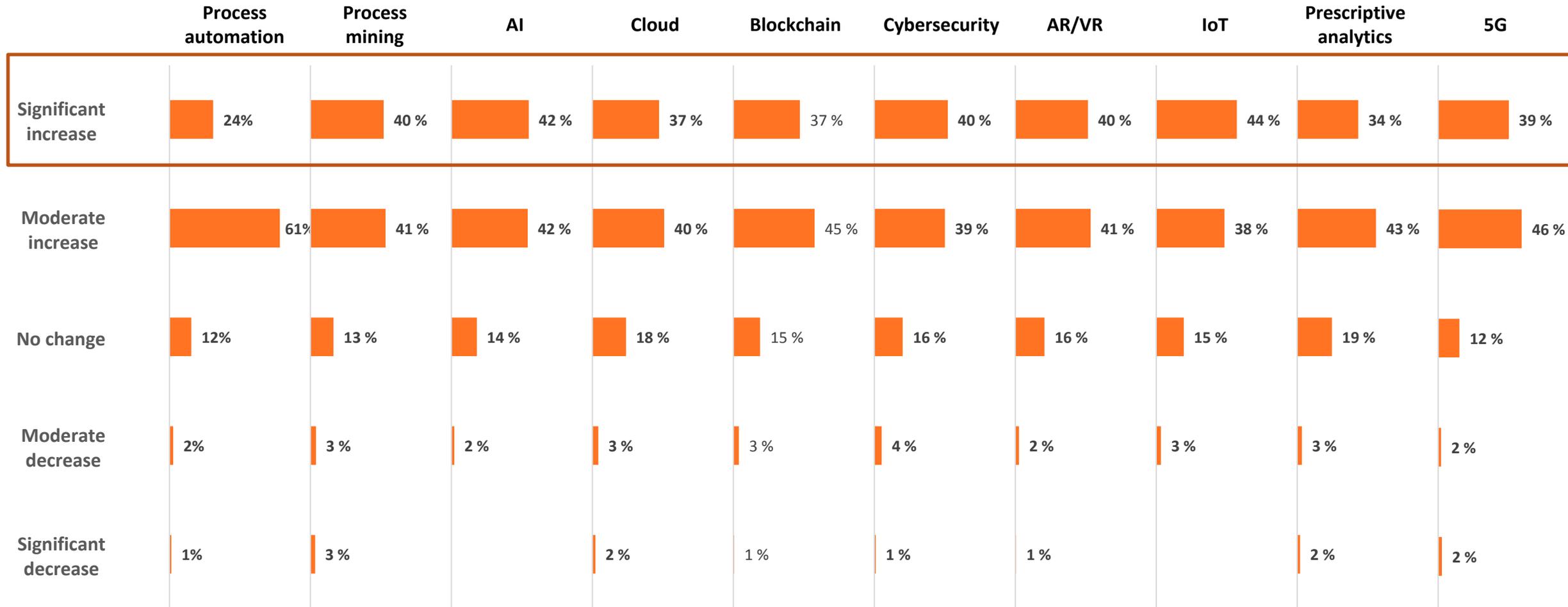
# The HFS OneOffice organization—digital transformation in action



# 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

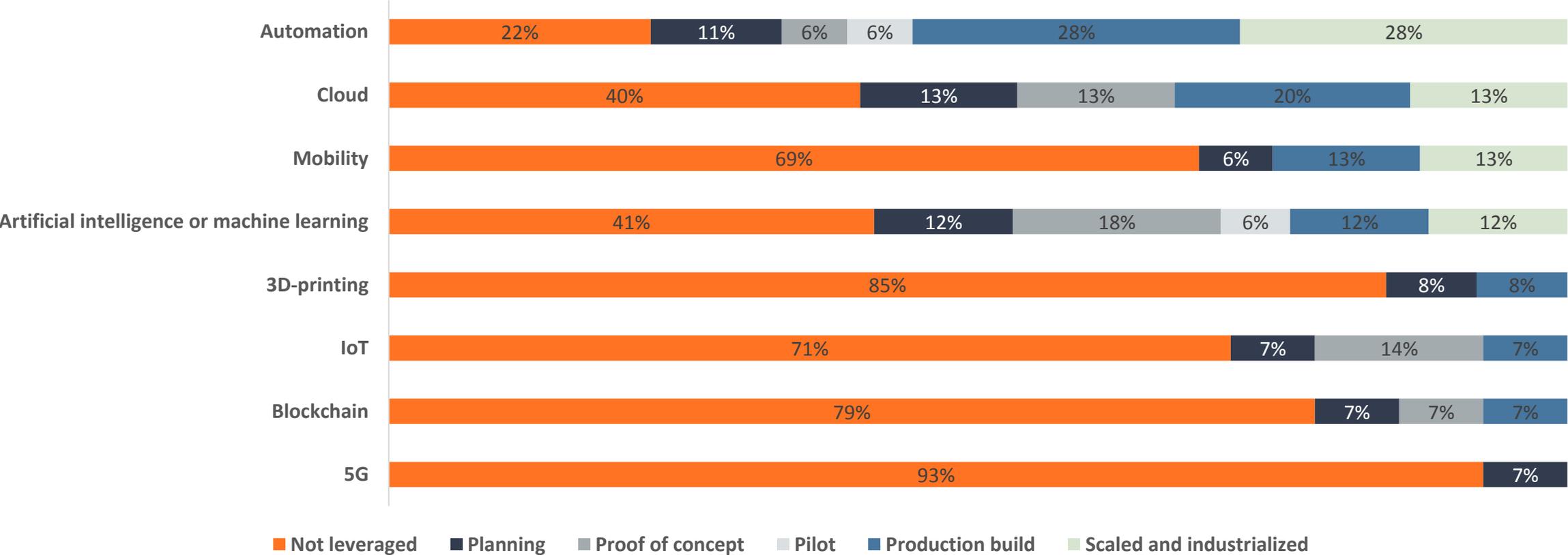


Sample: 200 supply chain, operations, and procurement respondents from Global 2000 enterprises

Source: HFS OneOffice Pulse Study, H1 2021

# 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

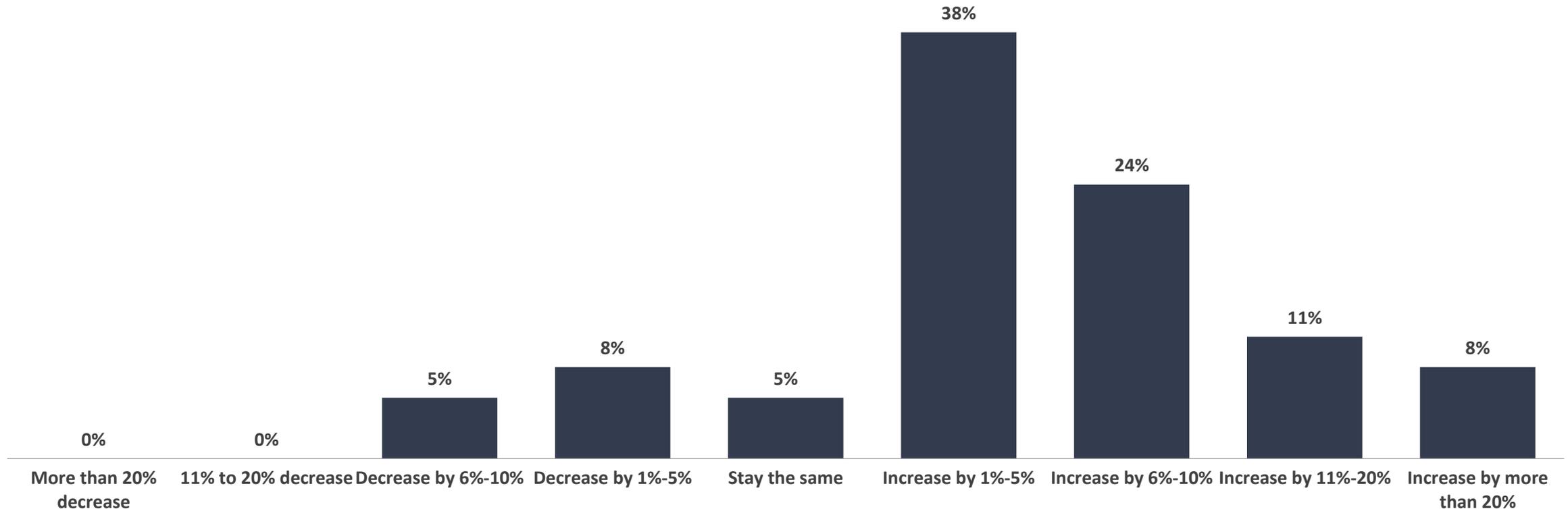


Sample: 21 supply chain client interviews  
Source: HFS Research, 2021

# 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



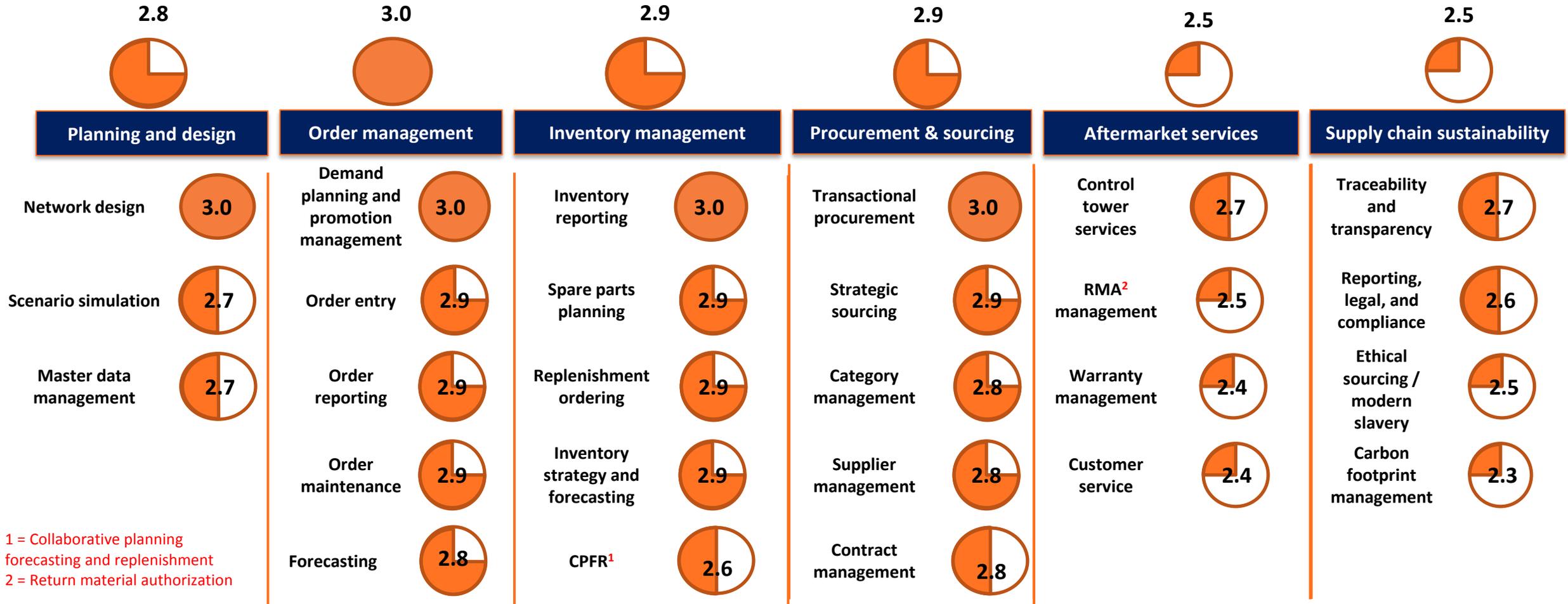
Sample: 200 supply chain, operations, and procurement respondents from Global 2000 enterprises

Source: HFS OneOffice Pulse Study, H1 2021

# 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



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



# Top 10 results: Supply chain services 2021

## Summary of service providers assessed in the report

Service providers (alphabetical order)	HFS point of view
<b>Accenture</b>	Delivering the promise of intelligent supply chains with a “One Accenture” go-to-market strategy
<b>Atos</b>	Digital supply chain solutions focused on realizing efficiency gains along the process
<b>Capgemini</b>	Driving frictionless supply chains leveraging integrated and autonomous operations
<b>EY</b>	Globally integrated end-to-end supply chain offering spanning transformation strategy, managed services, and commercial products
<b>GEP</b>	Pure-play supply chain and procurement solutions provider with unified consulting, software, and managed services
<b>Genpact</b>	Domain-led digital assets to help supply chain clients from design to transform to managed services, translating to responsibility for results
<b>HCL</b>	Integrated digital portfolio of SCM offerings to meet the new level of expectations from the supply chain
<b>IBM</b>	Building intelligent supply chains leveraging exponential technologies
<b>Infosys</b>	“Live” supply chain solutions designed to make supply chains adaptive and resilient, resembling living organisms’ ability to sense, reason, respond, and evolve to uncertainties
<b>PwC</b>	Driving high-value outcomes for supply chain clients leveraging a global, industry-focused, and experienced team enabled by emerging technologies
<b>TCS</b>	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 	#2 	#3 	#4 	#5 
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<b>Execution powerhouses</b> Top 3 providers on execution criteria	<b>Innovation champions</b> Top 3 providers on innovation criteria	<b>Outstanding voice of the customer</b> Top 3 providers on VOC
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#1 	#2 	#3 	#1 	#2 	#3 	#1 	#2 	#3 
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## 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

# 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														
#2														
#3														
#4														
#5														
#6														
#7														
#8														
#9														
#10														

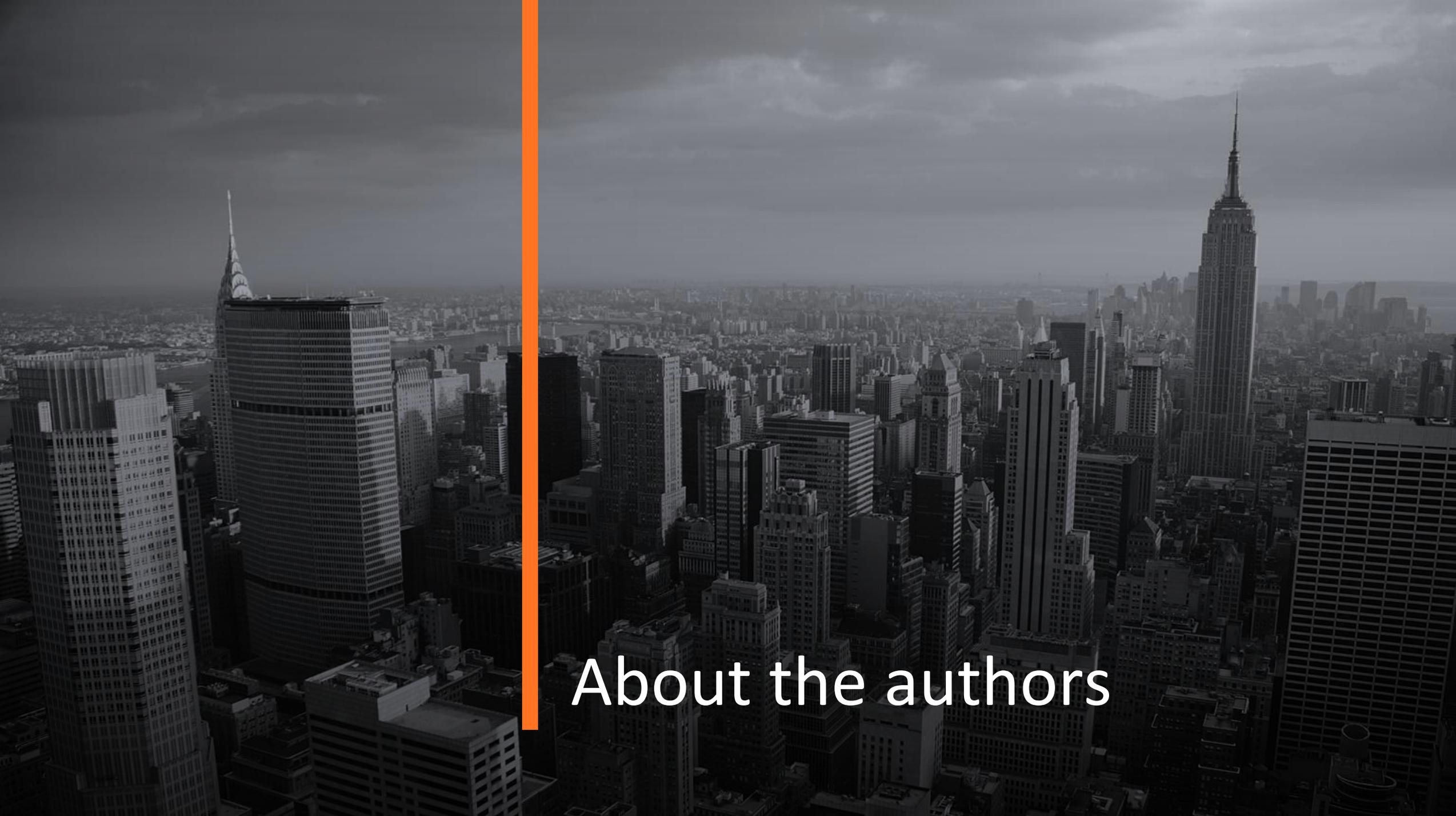


# Supply chain service providers profiles

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



Dimension	Rank	Strengths	Development opportunities		
HFS Top 10 position	#1	<ul style="list-style-type: none"> <li><b>Fully integrated globally delivering strategy through implementation.</b> 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.</li> <li><b>Strong repository of proprietary technology assets.</b> 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 &amp; IBP, Inventory Optimizer, etc.</li> <li><b>Global reach and scale.</b> 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.</li> <li><b>Pandemic response.</b> 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 &amp; distribution strategy for a Covid-19 vaccine.</li> <li><b>Differentiated partnership with P&amp;G.</b> EY has a strong partnership with P&amp;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.</li> <li><b>Client kudos</b> for collaboration, expertise, flexibility, and ability to operate from the C-suite to the shop floor.</li> </ul>	<ul style="list-style-type: none"> <li><b>Understanding client context.</b> 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.</li> <li><b>Premium priced.</b> 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.</li> </ul>		
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	<b>Acquisitions and partnerships</b> <b>Recent SCM related acquisition:</b> <ul style="list-style-type: none"> <li><b>Agility works:</b> A leading technology consultancy business (2019)</li> <li><b>Kienbaum:</b> A process consultancy firm (2017)</li> </ul> <b>Partnerships:</b> 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)	<b>Client portfolio</b> <b>Total no. of Supply chain clients:</b> 1,988 <ul style="list-style-type: none"> <li>50%+ of the Fortune 50 and Fortune 100 enterprises, mainly global consumer products and retail, advanced manufacturing &amp; mobility, global life sciences companies.</li> </ul> <b>Client geography mix:</b> <ul style="list-style-type: none"> <li>NA:33%</li> <li>Europe: 47%</li> <li>Middle East: 4%</li> <li>Africa: 1%</li> <li>APAC:10%</li> <li>Latin America: 5%</li> </ul> <b>Client industry mix:</b> Consumer Products & Retail: 18%, Government & Public Sector: 13%, Oil & Gas: 11%, Banking & Capital Markets: 8%, Life Sciences: 7%, Life Sciences Products 6%, Insurance 5%, Automotive & Transportation 5%, Others: 26%	<b>Service delivery operations</b> <b>Total Headcount for Supply Chain Services:</b> 47,000 <b>Specify delivery locations:</b> 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	<b>Proprietary tools and technologies</b> 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
Investments and partnerships	#1				
Technology innovation	#1				
Collaboration	#2				
Voice of the customer	#2				



About the authors

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Saurabh oversees HFS' global research function managing the global team of analysts across US, Europe, and Asia-Pac. He works closely with the CEO to set the strategic research focus and agenda for HFS Research, understanding and predicting the needs of the industry, and ensuring that HFS maintains its position as the strongest impact thought leader for business operations and services research.

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.



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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.

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Mayank Madhur is an Associate Director, Research at HFS Research, supporting different practice leads in area of Industry Research, IoT and Blockchain by working on, data analysis, PoV and research writing.

## 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.

Read more about HFS and our initiatives on [www.HFSresearch.com](http://www.HFSresearch.com) or follow [@HFSResearch](https://twitter.com/HFSResearch).

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