



Everest Group Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023

Focus on Infosys
July 2023



Introduction

Enterprises are grappling with various supply chain challenges, including evolving customer demands, planning limitations, and disruptions in production and distribution. Amidst recessionary headwinds and geopolitical tensions, enterprises are increasingly seeking third-party support to address supply chain challenges. Instead of solely relying on service providers for cost reduction, enterprises are now collaborating with them to add value across the entire supply chain through technology, process expertise, and specialized talent. To meet these evolving demands, service providers are enhancing their capabilities by cultivating domain-specific expertise, forging strategic technological and consulting partnerships, and developing state-of-the-art solutions to help enterprises navigate these challenges while reducing the environmental impact and achieving sustainability goals.

In the full report, we present an assessment and detailed profiles of 14 SCM providers featured on the [Supply Chain Management \(SCM\) BPS – PEAK Matrix® Assessment 2023](#). Each provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group’s annual RFI process for the calendar year 2022, interactions with leading supply chain service providers, client reference checks, and ongoing analysis of the SCM business process services market.

In the full report, we analyze the global SCM BPS service provider landscape and assess 14 SCM service providers. We focus on:

- Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2023
- Service provider capability assessment
- Enterprise sourcing considerations

Scope of this report



Geography
Global



Providers
14



Services
Supply Chain
Management (SCM)

Supply Chain Management (SCM) services PEAK Matrix® characteristics

Leaders

Accenture, Genpact, and TCS

- Leaders strengthened their position in the SCM market by increasing their expertise and presence across industries and regions to achieve growth in 2022
- They have enhanced their end-to-end SCM capabilities through continued investments, partnerships, and acquisitions to improve domain expertise, consulting capabilities, speed-to-market, and techno-functionally skilled resources along with advanced digital capabilities that enable them to drive the large-scale, end-to-end transformation of SCM
- Leaders are increasingly developing capabilities to support organizations in new areas such as supply chain planning, risk management, and sustainability
- Leaders have demonstrated success in engaging with clients through outcome-based constructs, showcasing their strategic partnership orientation

Major Contenders

Capgemini, Cognizant, GEP, HCLTech, IBM, Infosys, OnProcess Technology, Tech Mahindra, and Wipro

- While some of the Major Contenders offer support across the SCM value chain, most providers in this category have strong experience and expertise on specific parts of the value chain. However, they are investing in developing solutions and capabilities to plug existing gaps that enable them to provide a wide range of supply chain services
- They also provide modular offerings, point solutions, and proactive customer support to address specific client requirements and provide high-level of flexibility in pricing and engagement models
- Major Contenders are building capabilities and offerings to support various types of buyer segments including first-generation SCM outsourcers and the SMB and mid-market segment buyers

Aspirants

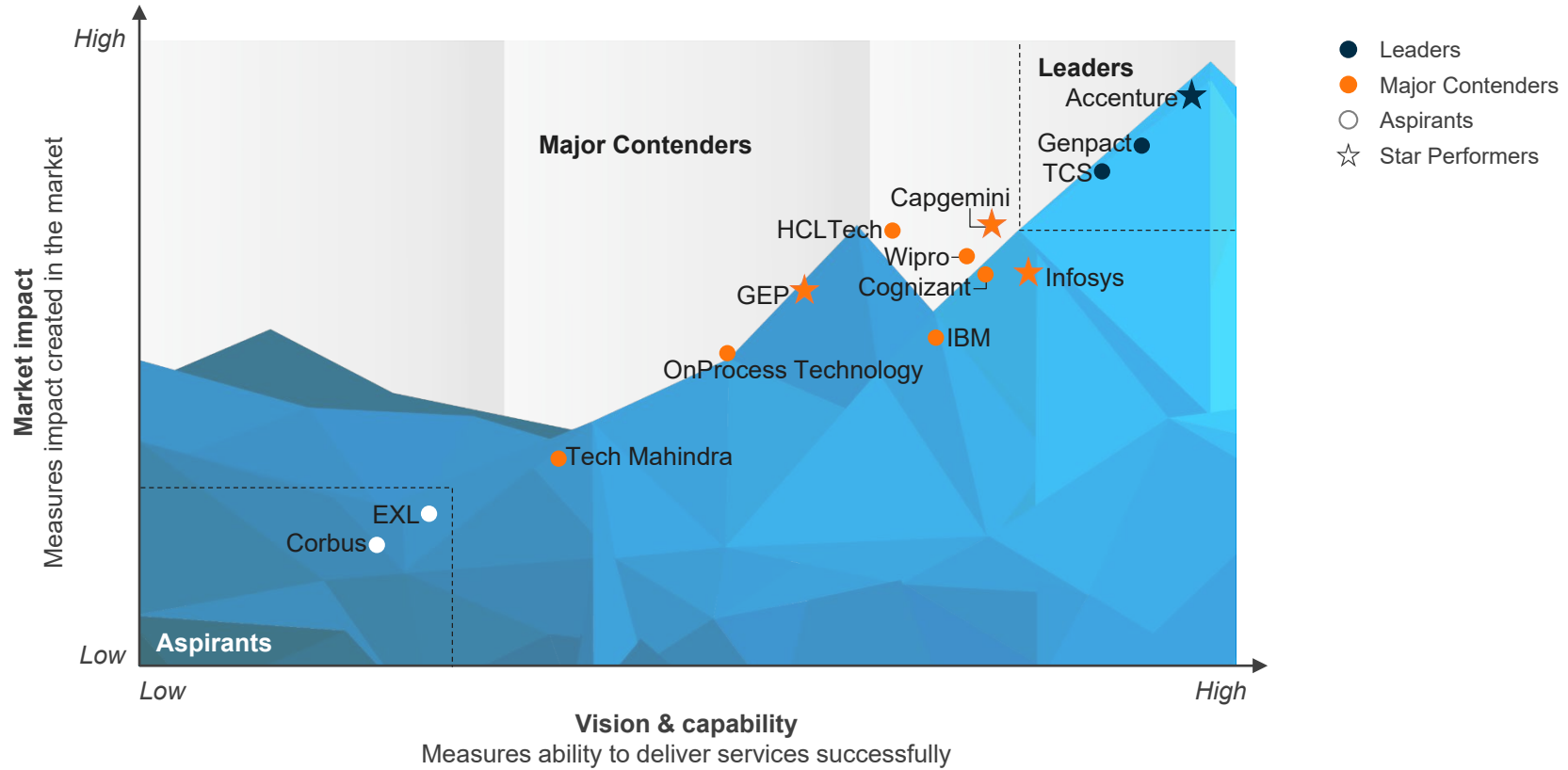
Corbus and EXL

- These are providers focused on specific supply chain management processes, vertical(s), or buyers, and have a relatively small scale of SCM upstream operations with more focus on downstream operations
- While they have developed some digital capabilities and offer innovative models of delivery, they have limited scale, digital maturity, and resource expertise to cater to upstream, industry-specific, and end-to-end SCM requirements of large global buyers

Everest Group PEAK Matrix®

Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023 | Infosys positioned as a Major Contender and a Star Performer

Everest Group Supply Chain Management (SCM) BPS – PEAK Matrix® Assessment 2023¹



¹ Assessments for Cognizant, EXL, and IBM, exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with SCM buyers
Source: Everest Group (2023)

Infosys profile (page 1 of 6)

Overview

Key leaders

- **Anantha Radhakrishnan**, Chief Executive Officer and Managing Director
- **Satish Nair**, Senior Vice President & Global Head of Sales
- **Raghunath Candadai**, Associate Vice President and Strategic Business Practice Head, Sales and Fulfillment

SCM services suite

Supply chain planning, execution, and control across the end-to-end value chain

- **Supply chain planning:** demand planning, supply planning (distribution and production), inventory planning, material planning, transportation planning, service parts planning, and optimization
- **Supply chain execution:** quoting, order management and fulfillment, logistics and inventory management, and manufacturing operations support in execution
- **After-market operations:** warranty, service contract, reverse logistics, and field support
- **Enabling:** master data, contract management, reporting, and analytics
- **Technology:** Infosys Live Enterprise Solutions for the digital transformation of end-to-end supply chain using AI, ML, big data, and advanced analytics

Partnerships

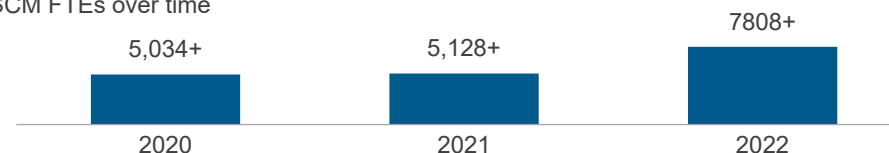
- **b2wise:** demand and supply planning
- **Palantir Foundry:** supply chain planning and execution
- **Supply Wisdom:** risk management
- **Incorta:** unified data and analytics platform
- **VC4:** asset management
- **ServiceMax:** field maintenance services
- **FourKites (Tracking):** logistics track and trace
- **IBM Maximo:** maintenance asset management

Number of clients: 28¹

¹ Infosys has redefined the classification of clients to those that generate a revenue of at least US\$200,000 per annum

Scale of operations

Number of SCM FTEs over time



FTE mix by process scope



Key SCM-related developments (till Q3 2022)

- **b2wise:** cloud-based E-2-E DDMRP and supply chain planning platform
- **Palantir Foundry:** Palantir Foundry is a fully managed SaaS platform that spans from cloud hosting and data integration to flexible analytics, visualization, model-building, operational decision-making, and decision capture
- **Supply Wisdom:** Supply Wisdom is an AI-enabled risk management solution that is transforming the third-party and supply chain intelligence space by continuously monitoring the widest risk aperture in the market
- **Fleet management:** IoT solution for real-time tracking of fleet vehicles, route and navigation information, and driving behavior analysis
- **Partner Center of Excellence:** focused on enabling the necessary hard and soft infrastructure needed to leverage a symbiotic partner ecosystem
- **Digital CoE:** set up in Poland by leveraging the IBM Watson platform to address specific supply chain use cases
- **Business process simulation center:** set up to develop enabling tools to aid business processes execution and management. Example: DigiTran knowledge management platform
- **Live Enterprise:** increased investments in Infosys Live Enterprise

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Client portfolio

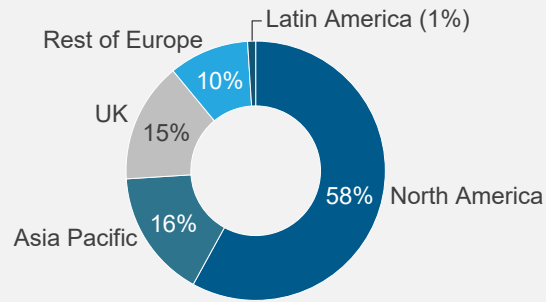
Major SCM clients

A global network equipment manufacturer, a leading aerospace manufacturer, a leading software major, an American multinational telecommunications corporation, a global consumer healthcare and lighting major, an Australian mining corporation, and a leading industrial equipment manufacturer

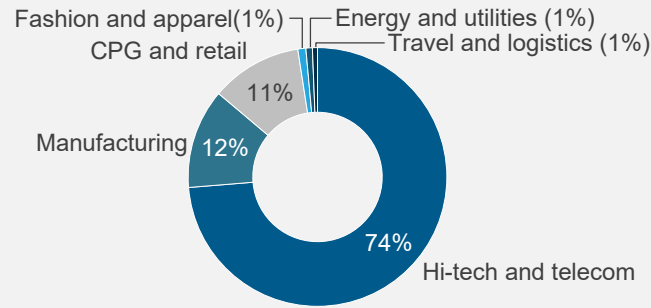
Recently-announced multi-process SCM engagements

Time of signing	Client	Contract details
2022	A Japanese telecommunications company headquartered in Tokyo	Five-year contract
2022	An American Tobacco Company	Five-year contract
2022	A Singapore-based telecom company	Five-year contract
2022	A UK-based electrical retailer and aftercare service provider	Five-year contract

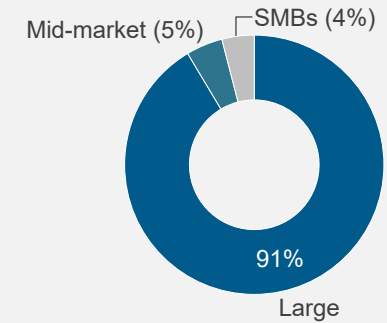
SCM revenue mix by buyer geography (Q3 2022)



SCM revenue mix by buyer industry (Q3 2022)



Number of SCM clients by buyer size¹ (Q3 2022)



¹ Large buyers (revenue >US\$5 billion), mid-market buyers (revenue US\$1-5 billion), and SMB buyers (revenue <US\$1 billion)

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Key delivery locations



Infosys profile (page 4 of 6)










Technology solutions

Technology solutions	AI-Driven Demand Forecasting	Supply Chain Control Tower	Predictive Logistics Smartbench	EPOCH 4.0
Solution description	<ul style="list-style-type: none"> • Cloud-based forecasting solution leveraging Neural Networks, Machine Learning (ML), and time-series-based forecasting algorithms • Periodic forecast generation using ML algorithms • Forecast workbench generates and displays forecasts at the end of each period for multiple product families 	<ul style="list-style-type: none"> • Identifying the root cause and helping in avoiding silos • Integrated and connected data across the supply chain • One-stop-shop for the management of data-based decisions • End-to-end supply chain traceability and visibility • Knowledge graph and mapping connections across multiple nodes in the supply chain 	<ul style="list-style-type: none"> • Single unified workbench enabling a single source for market rates and indices, internal rates, distance engine, and calculations • AI-/ML-based deep-learning model used an ensemble (multi-variate, multi-algorithm) approach to predict the market rate 	<ul style="list-style-type: none"> • Supply Chain-as-a-Service • Microservice architecture • Platform approach • Cloud native • Designed for scalability and observability
Process scope	Demand forecasting	Supply chain visibility	Logistics management	Order management
Technology leveraged	<ul style="list-style-type: none"> • ML • AWS • SNOWFLAKE • Python 	<ul style="list-style-type: none"> • Infosys DCC • AI • Azure 	<ul style="list-style-type: none"> • AI • ML 	<ul style="list-style-type: none"> • AI • Cloud • Hyper automation
Delivery model and pricing	Not available			

Infosys profile (page 5 of 6)

Everest Group assessment – Major Contender and Star Performer

Measure of capability:  Low  High

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								










Strengths

- Infosys leverages synergies across its BPM, consulting, and technology teams to deliver integrated supply chain services to its clients
- It has further integrated its supply chain offerings through the Infosys LIVE Enterprise Suite, which leverages blockchain, AI/ML, and analytics with a cloud-first approach for an agile, resilient, and connected supply chain, providing clients access to solutions such as Infosys Nia and Trade Edge on a single platform
- Infosys has increased its geographic presence with new centers with an increased focus on order management and fulfillment in Johannesburg and Berlin. In addition, it has extended its presence to Romania, Malaysia, and the Netherlands to support its broader SCM offerings
- It has continued investing in upskilling/reskilling employees including a focus on their soft-skill development through its e-learning platform LeX and partnerships with reputed universities as well as technology platforms such as Kinaxis
- Infosys has enhanced its people offerings through acquisitions and partnerships such as Portland Consulting, Lodestone, and NOAH Consulting
- Infosys has strong expertise in serving clients in the hi-tech and telecom industries. Furthermore, travel and logistics clients can benefit from Infosys' partnerships with FarEye, Mojro, and FourKites, and other significant investments such as:
 - Fleet management for real-time tracking of vehicles, route and navigation information, and driving behavior analysis
 - Track and trace systems in logistics, which aids in product authentication and reduces the chances of counter-feinting
- Infosys can support its clients on ESG strategy implementation through its in-house offerings such as decarbonization and energy transition solutions, circular business models for product life cycle management, ESG data and analytics, and ESG-as-a-service model
- Infosys is appreciated by its clients for its long-standing and stable leadership with a strong focus on relationship building, domain and process expertise, global delivery, and flexibility in providing client environment-ready FTEs even in disruptive environments

Infosys profile (page 6 of 6)

Everest Group assessment – Major Contender and Star Performer

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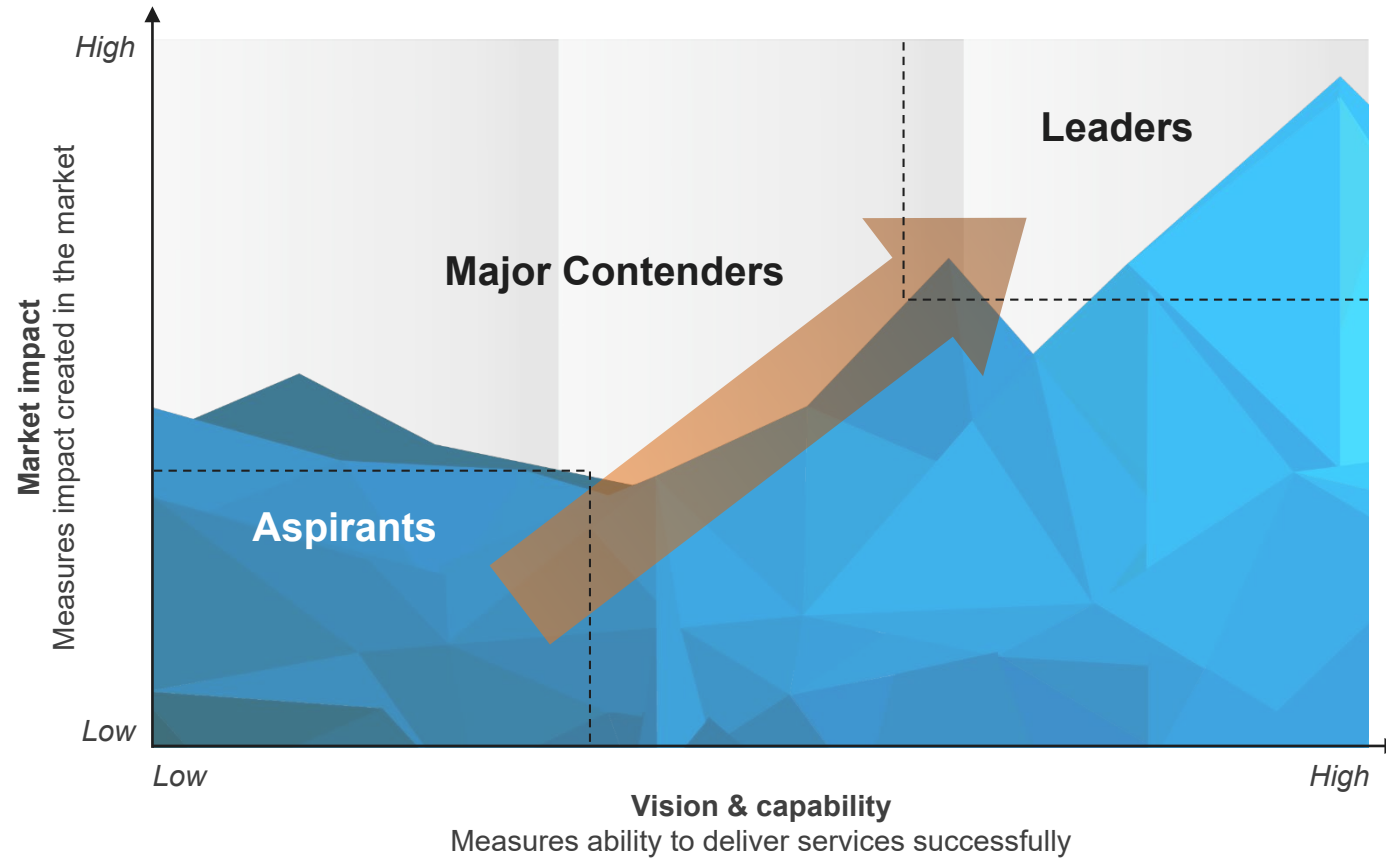
Limitations

- Though Infosys is focusing on building BPaaS capabilities to serve SMB and mid-market buyers, its current client base comprises predominantly of large buyers
- Although Infosys has developed capabilities and partnerships such as B2wise to support the demand-driven operating model (DDMRP), its ability to implement and deliver at scale is yet to be tested
- Infosys has limited make/manufacture and after-sales capabilities in comparison with its peers
- While Infosys has partnerships with providers such as Kinaxis and o9 Solutions that boost Infosys Live capabilities and ease of integration with existing client solution, its deployments in client engagements are low
- Clients have highlighted a scope of improvement in providing more ownership to resources to identify and drive process transformation initiatives across all designations, along with focusing on talent retention strategies for operation-intensive roles

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability

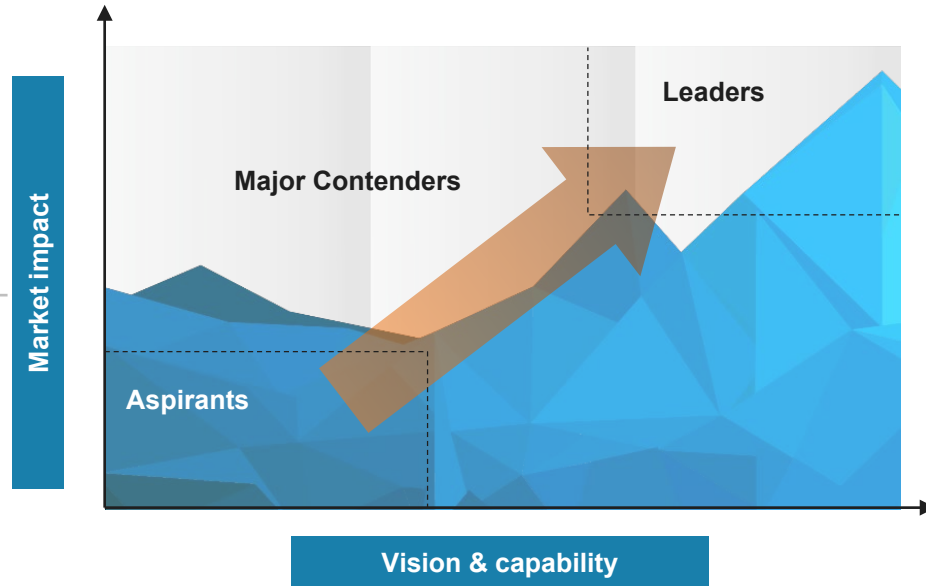
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Number of clients, revenue base, YoY growth, and deal value/volume
- Portfolio mix**
Diversity of client/revenue base across geographies and type of engagements
- Value delivered**
Value delivered to the client based on customer feedback and transformational impact



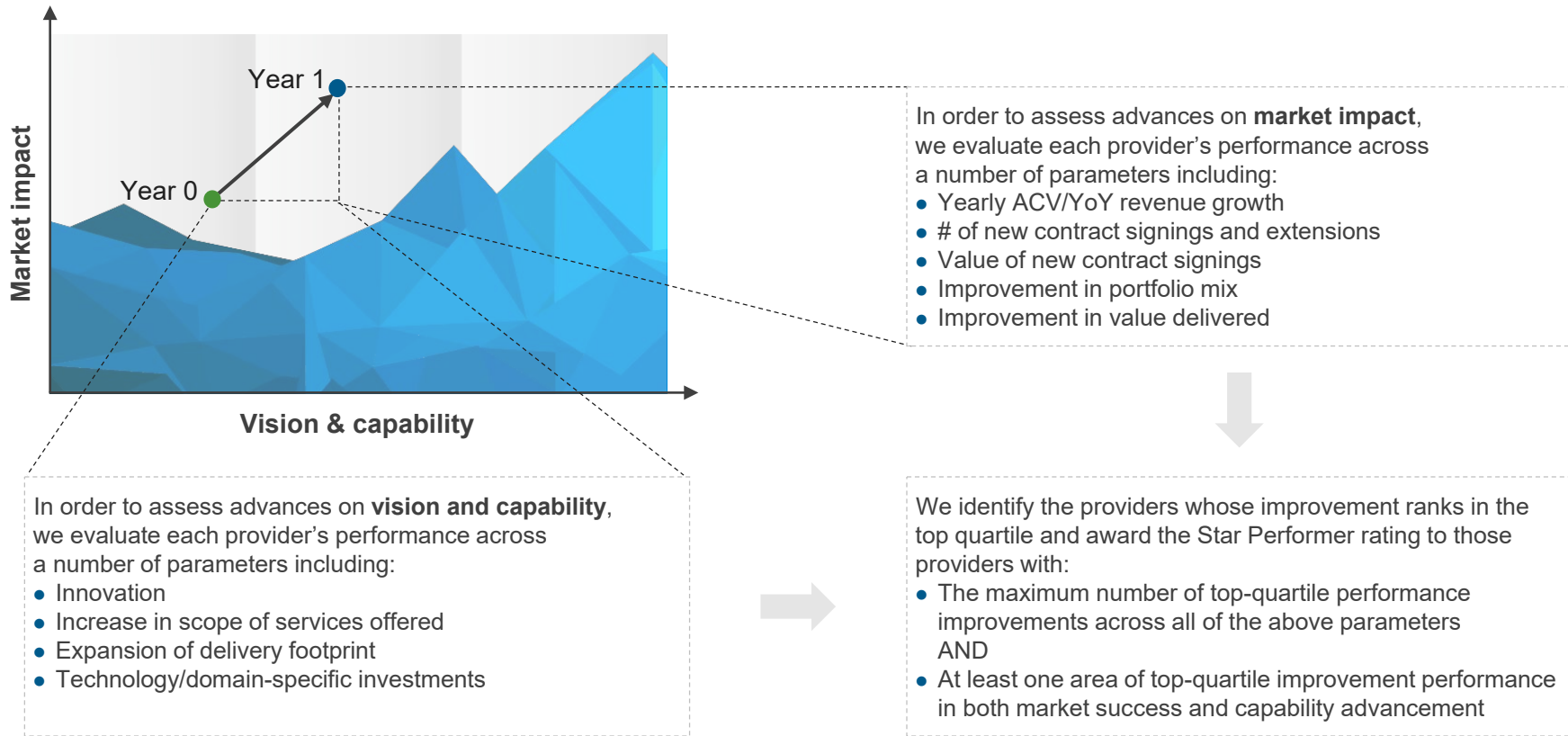
Measures ability to deliver services successfully. This is captured through four subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Scope of services offered**
Depth and breadth of services portfolio across service subsegments/processes
- Innovation and investments**
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.
- Delivery footprint**
Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

- Enterprise participants receive summary of key findings from the PEAK Matrix assessment
- For providers
 - The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
 - In addition, it helps the provider/vendor organization gain brand visibility through being included in our research reports

What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

- Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:
 - Issue a press release declaring positioning; see our [citation policies](#)
 - Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
 - Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or [contact us](#)

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.



Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at www.everestgrp.com.

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