Supply Chain Operations Business Process Transformation 2026 RadarView™

Evolution toward a smarter, autonomous, and resilient supply chain

May 2026

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About the report

About the Supply Chain Operations Business Process Transformation 2026 RadarView™

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The *Supply Chain Operations Business Process Transformation 2026 RadarView* is a companion report to the *Supply Chain Operations Business Process Transformation 2026 Market Insights*. While the Market Insights report provides an overview of the current state of the supply chain market, this report showcases the supply-side trends and features an analysis of the providers' capabilities in supply chain operations services.

2

We evaluated 42 providers using a rigorous methodology across the key dimensions of practice maturity and future-proofing. Through our analysis, we recognized 21 providers that brought the most value to the market over the past 12 months.

3

The *Supply Chain Operations Business Process Transformation 2026 RadarView*™ aims to provide a view into the leading service providers offering supply chain services. Based on our methodology, these service providers are categorized into five broad segments: leaders, innovators, disruptors, challengers, and tech pioneers.

4

To enable decision-making, Avasant has provided an overview of the major service providers in the industry. This includes a list of their top enterprise clients, customer success stories, key IP assets/solutions and partnerships, and major supply chain operation subprocesses. This is supported by an analyst's take on the providers across the two key dimensions outlined in the second point above.

Key reports of Avasant's supply chain operations business process transformation research

Market Insights™ 2026

This report provides a comprehensive overview of the supply chain operations landscape. It delves into the current state of the market, analyzes recent trends shaping the industry, and offers a perspective on the future outlook for the supply chain services industry.

RadarView™ 2026

This report examines how leading service providers are delivering supply chain operations services. It covers key supply-side trends and features a deep-dive analysis of providers that Avasant has recognized for their excellence and innovation in the space.

Executive summary

Definition and scope of supply chain operations business process transformation

Key definitions

Supply chain operations services business process transformation:

Supply chain operations services business process transformation refers to end-to-end, outcome-oriented managed services that modernize and operate an enterprise's supply chain using a combination of process reengineering, digital platforms, data, and AI-driven decision intelligence.

Service providers deliver technology-enabled, insight-led operations that improve cost efficiency, service levels, resilience, sustainability, and regulatory compliance across global supply networks.

Supply chain operations services value chain

Supply chain strategy and planning

- Sales and operations planning
- Distribution and manufacturing center location strategy
- Supply chain master data management (MDM)

Inventory management

- Inventory analysis and planning
- Inventory replenishment
- Spare parts management

Order management

- Order entry
- Order maintenance
- Order reporting

Transportation and warehouse management

- Transportation planning
- Shipping and logistics management
- Warehouse management

Aftermarket services

- Returns approval and management
- Warranty management
- Customer service

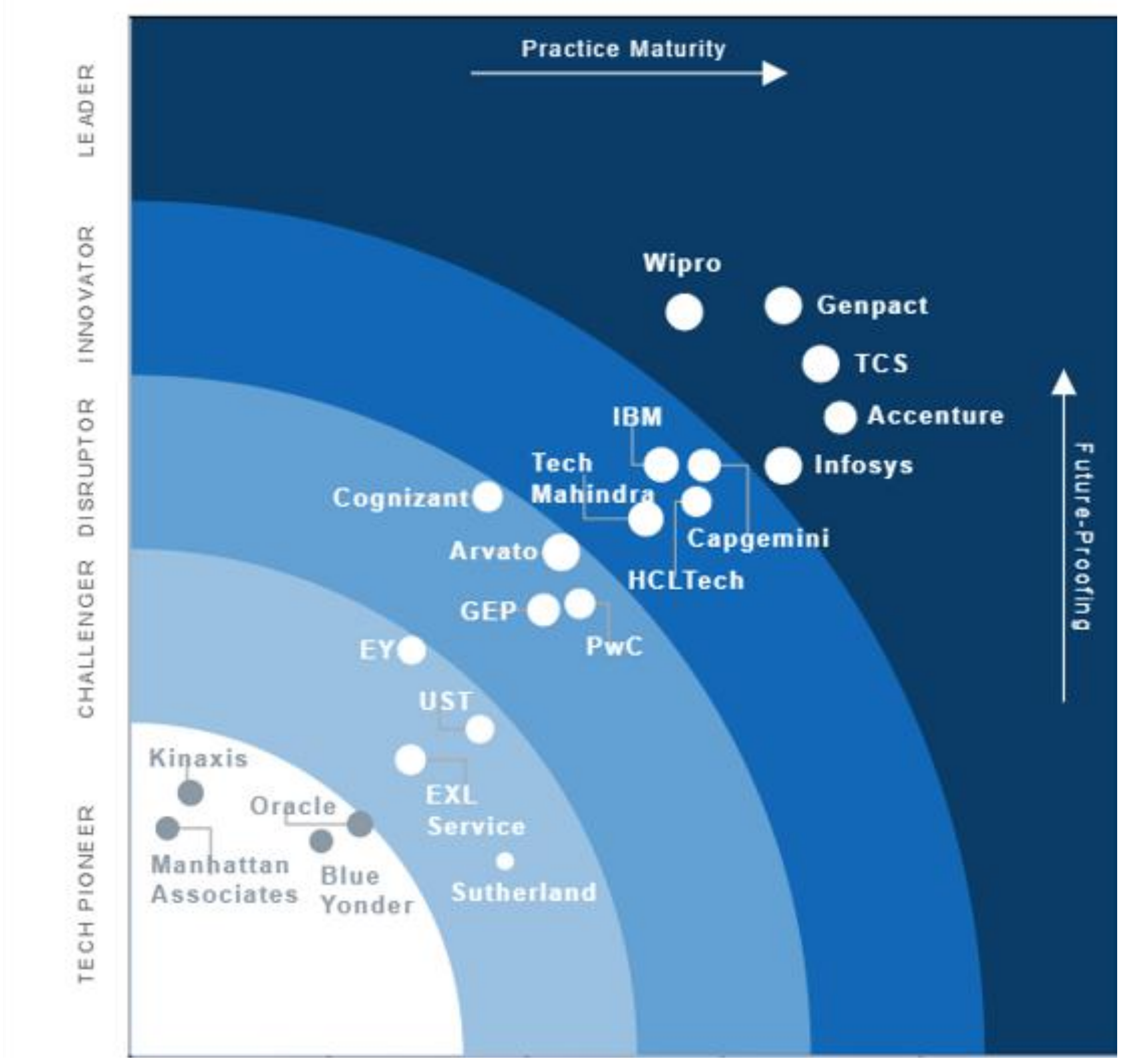
Reporting and compliance

- Supply chain reporting and compliance services
- Supply chain sustainability services

Transformational levers

- Agentic AI, Gen AI, RPA, digital twins, IoT, blockchain, and advanced analytics
- Sustainable, circular, and low-carbon supply chain operations
- Agile and resilient supply chain models (multisourcing and nearshoring)
- Autonomous and semi-autonomous supply chain execution models
- Continuous process optimization and value tracking

Avasant recognizes 21 top-tier providers offering supply chain operations business process transformation services



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Provider comparison (1/2)

Service provider	Practice maturity	Future-proofing	Key highlights
accenture	★★★★★	★★★★★	Combines advisory-led strategy with execution and leverages its proprietary platforms, such as SynOps and myConcerto, for its supply chain offerings.
arvato	★★★	★★★	Expanded its global logistics footprint with new distribution facilities across Türkiye, Germany, the US, and China, along with investments in capabilities such as bonded warehousing.
Capgemini	★★★★	★★★★	Investing heavily in agentic and Gen AI, supported by partnerships and acquisitions such as WNS, to scale AI-driven, data-centric supply chain operations globally.
cognizant	★★★	★★★	Investing in AI with initiatives such as opening a new AI Lab and expanding its partnership with Adobe to integrate Gen AI capabilities within enterprise supply chain workflows.
EXL	★★	★★★	Investing in AI-driven supply chain risk and tariff analytics solutions that simulate global tariff impacts, enabling organizations to optimize sourcing strategies and improve resilience.
EY	★★★	★★	Enables supply chain transformation through its Reinvention Framework, blockchain traceability platforms, and AI-driven order management and digital manufacturing solutions.
genpact	★★★★★	★★★★★	Shows depth in planning, order management, and aftermarket services, with mature embedding of AI and digital twins, such as order assist, into core operational workflows.
GEP	★★★	★★★	Enables AI-driven supply chain and procurement transformation through its NEXXE platform, control tower visibility, and agentic AI orchestration capabilities.

Provider comparison (2/2)

Service provider	Practice maturity	Future-proofing	Key highlights
HCLTech	★★★★	★★★★	Has deep expertise in execution-heavy, product-centric environments, with focused investments in agentic AI platforms and control tower-led operations.
IBM	★★★★★	★★★	Delivers platform-led supply chain operations centered on its Sterling suite. Advancing agentic AI and ecosystem-driven innovation through partnerships with hyperscalers.
Infosys	★★★★★	★★★★	Continues to scale AI-first capabilities across order management, logistics, and commercial operations, supported by partnerships with specialists, including the March 2026 Incora alliance.
pwc	★★★	★★★	Investing in agentic operating models through its own AI agent OS and partner-led innovations, signaling a shift toward orchestrated, AI-enabled supply chain operations.
SUTHERLAND	★★★	★★	Delivers platform-led supply chain operations anchored around its proprietary eSeal platform, providing unit-level traceability, real-time visibility, and control across various functions.
tcs TATA CONSULTANCY SERVICES	★★★★★	★★★★★	Focuses on embedding Gen AI and agentic AI across processes to drive automation and decision intelligence, expanding its partner ecosystem to further strengthen capabilities.
Tech Mahindra	★★★★	★★★	Focuses investments on scaling reusable, AI-enabled platforms (such as agentic AI and control towers) to drive visibility, automation, and decision intelligence.
UST	★★★	★★	Has a strong footprint in retail, specifically strengthening capabilities in warehouse management, transportation management, and omnichannel commerce.
wipro	★★★★	★★★★★	Has expanded investments and ecosystem to include the Mindsprint acquisition, Olam Group engagement. Has continued to scale AI platforms and partnerships for AI-enabled transformations.

Tech pioneer comparison

Service provider	Key highlights
BlueYonder	Has pushed beyond forward logistics with its acquisition of Optoro and investments in warehouse intelligence, positioning it as the vendor that addresses the full life cycle from fulfillment through returns and recommerce.
Kinaxis	Leverages its Maestro platform for concurrent, in-memory planning with GPU-based optimization and no-code AI agent creation to support real-time scenario modeling and decision-making across supply networks.
Manhattan Associates	Deploys its cloud-native Active platform that embeds autonomous AI agents directly within WMS*, TMS*, and OMS* workflows, enabling seamless multi-agent orchestration and real-time fulfillment optimization across omnichannel operations.
Oracle	Has embedded AI agents that mark a strategic shift toward semi-autonomous supply chain operations, reducing manual intervention across procurement, logistics, and order management.

Supply-side trends

Providers are seeing growth in execution-focused supply chain operations, driven by resilience, automation, and visibility demands

FTE expansion is concentrated in order management and supply chain planning, while enterprises increasingly prioritize resilience, process automation, and analytics-led visibility across supply chain engagements.

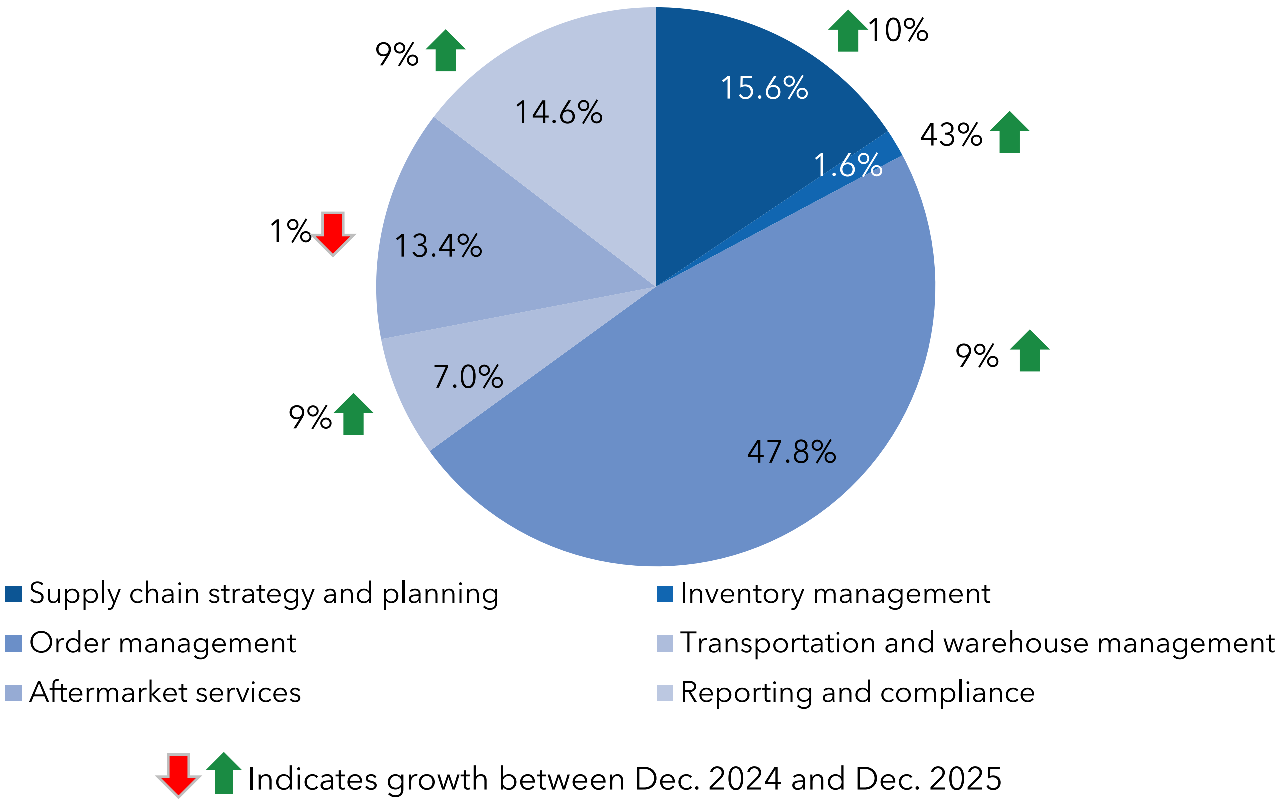
4%-8%
FTE growth
(Dec. 2024–Dec. 2025)

8%-12%
Revenue growth
(Dec. 2024–Dec. 2025)

Top five factors influencing supply chain operations engagements (in order of importance)

1. Supply chain resilience and risk management
2. Process automation and optimization
3. Supply chain visibility and analytics
4. Domain expertise
5. Cost of services delivered

Percentage of providers' FTE, by processes (as of December 2025)



Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

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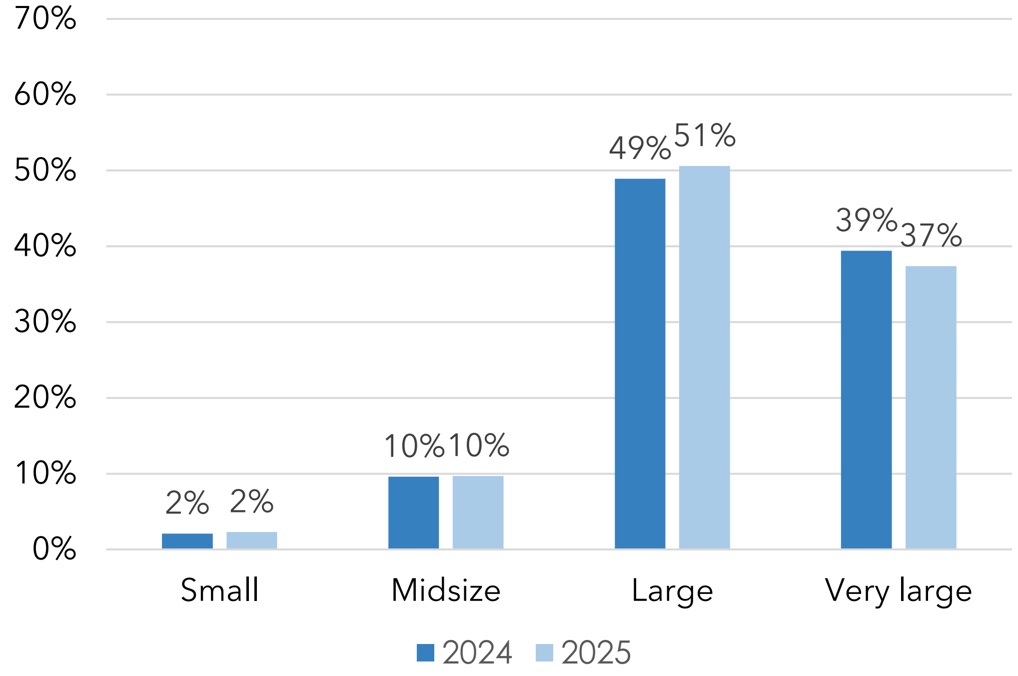
Large and very large enterprises are driving supply chain outsourcing, while North America continues to dominate the supply chain services market

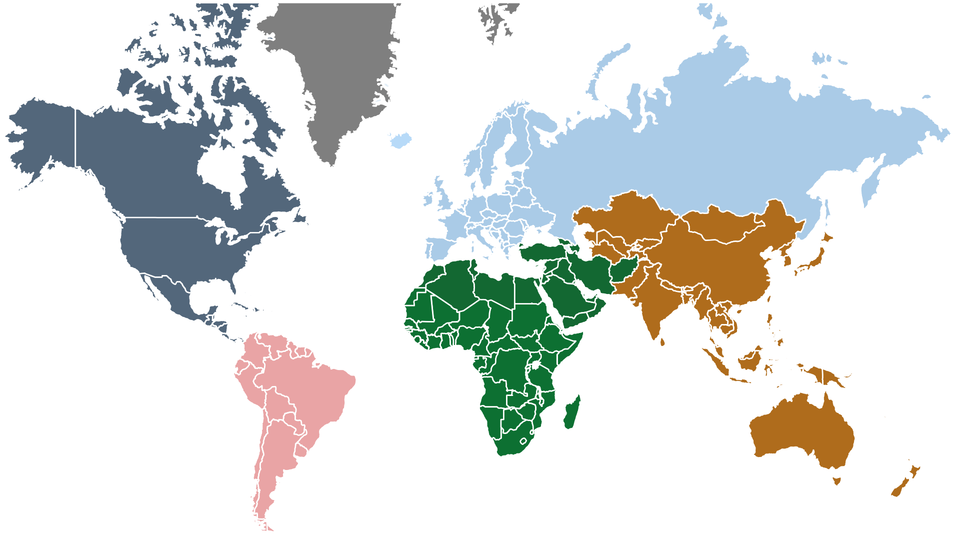
Latin America is leading growth in outsourced services with a 16% YOY revenue increase, followed by North America at 13% and Europe at 12%.

Client distribution

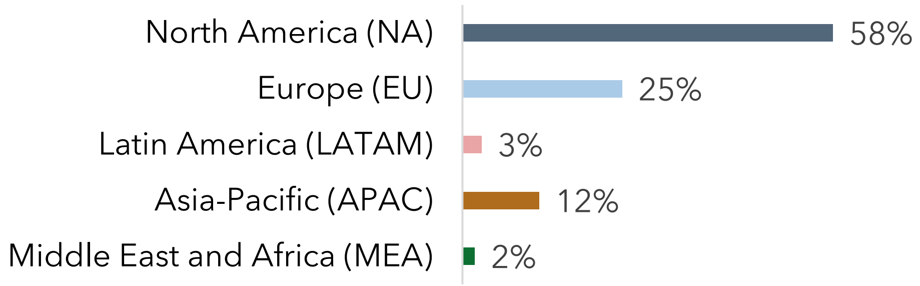


~90% Share of large and very large enterprise clients in 2025

Small:	<\$250M	Large:	\$1B–\$25B
Midsize:	\$250M–\$1B	Very large:	>\$25B revenue



Supply chain services revenue as a percentage, by geography



Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

Enterprises are increasingly adopting outcome-linked and hybrid pricing models to balance flexibility, accountability, and transformation risk

Outcome-/KPI-based pricing continues to dominate engagements, while hybrid models are witnessing strong adoption growth as buyers seek greater alignment between commercial models and measurable business outcomes.

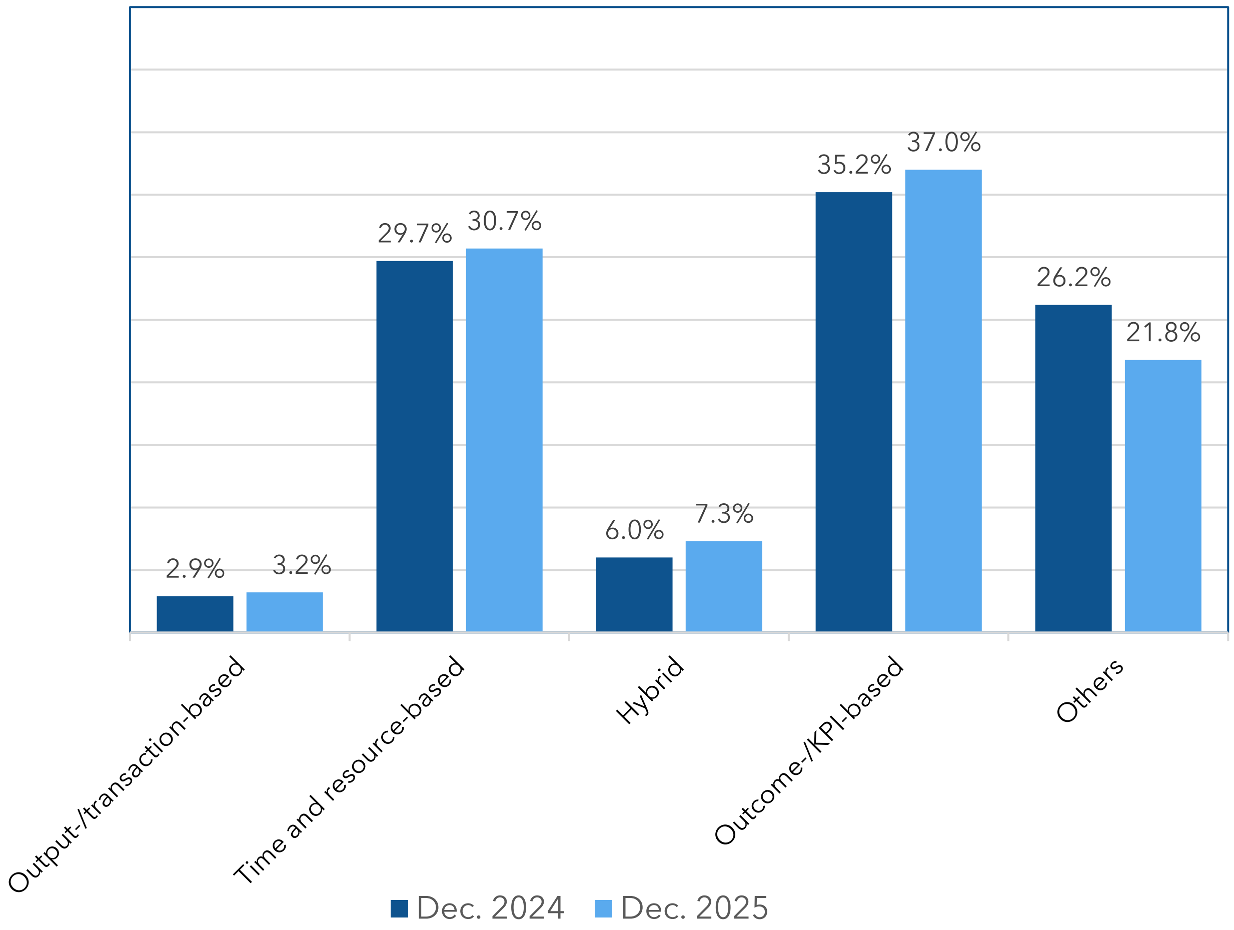
Output-/transaction-based pricing remains niche but is gaining gradual traction, with a modest YOY share increase supported by an 8% rise in client adoption, driven by selective use in well-defined, repeatable activities.

Time- and resource-based pricing continues to account for about one-third of engagements, reflecting buyers' preference for flexibility, control, and low-risk contracting amid ongoing uncertainty and evolving scopes.

Hybrid pricing is among the fastest-growing models, with client adoption up 17%, as buyers pair cost certainty with performance-based incentives to balance transformation and risk.

Outcome-/KPI-based pricing remains the dominant and expanding model, signaling high buyer maturity and growing confidence in linking fees directly to measurable business outcomes and end-to-end impact.

The decline in "other" pricing models—primarily fixed price models—reflects buyers moving away from rigid, effort-based structures toward simpler, more transparent, and outcome-aligned commercial models.

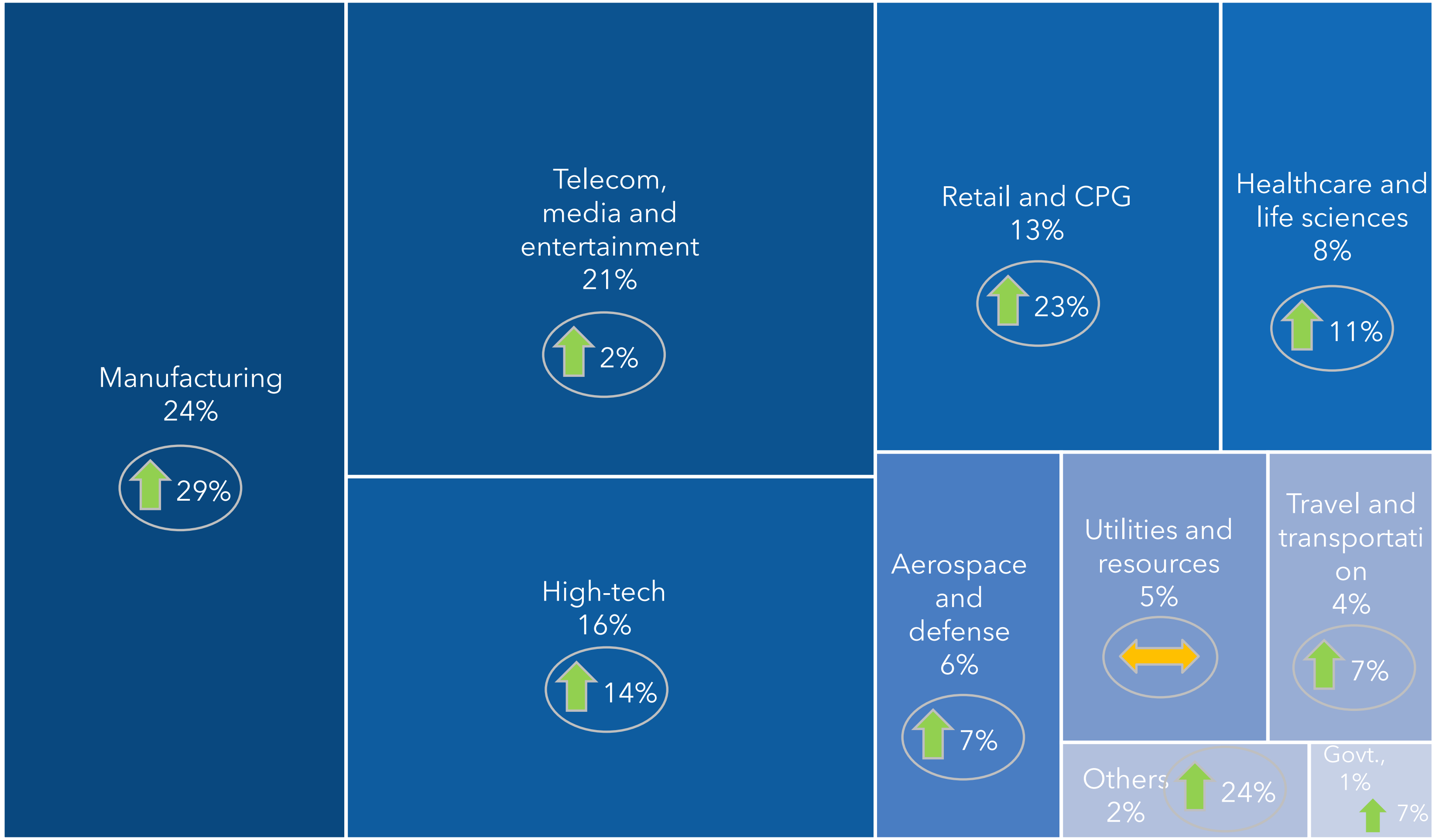


Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

Manufacturing, retail, and high-tech industries are driving increased investment in resilient and digitally enabled supply chain operations

Manufacturing remains the largest revenue contributor for providers with a nearly 30% YOY growth, while retail and CPG and high-tech sectors are accelerating supply chain spending to strengthen agility, omnichannel fulfillment, and risk-resilient operations

Percentage of revenue from different verticals for supply chain operations services providers



Industries with rising supply chain spend

Manufacturing: Manufacturers are increasing supply chain spend to manage rising complexity and disruption by investing in digital and Industry 4.0 capabilities that improve resilience, visibility, and agility, even at the cost of higher near-term complexity.

Retail and CPG: Retail and CPG firms are ramping up supply chain investments to meet growing demands for speed, omnichannel fulfillment, and personalization, while strengthening resilience against market volatility and supply shocks.

High-tech: High-tech companies are boosting supply chain spending to address geopolitical risk, rapid innovation cycles, and regulatory pressures by building resilient, digitally enabled, and multisourced supply networks.

*Govt.: Government; CPG: Consumer packaged goods

Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

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Providers are increasing investments in AI platforms, talent transformation, and capability expansion to scale next-generation supply chain operations

Share of planned investments across different areas

30%
Practice growth
Scaling supply chain offerings through expanded platform capabilities, GTM initiatives, and industry-specific solutioning

29%
R&D
Investments in AI, digital twins, and accelerators to enhance supply chain automation and decision-making

22%
Human capital
Upskilling on AI-led delivery, digital skills, and domain-specific supply chain expertise

19%
Inorganic expansion
Strategic acquisitions to strengthen provider portfolios in supply chain analytics, value chain optimization, and sector-specific capabilities

Provider Spotlights

Tech Mahindra

Tech Mahindra is enhancing its proprietary platforms, including the evolution of Yantr.ai into an end-to-end supply chain optimization and orchestration platform and the development of agentic AI capabilities through the Orion platform. These investments strengthen reusable, platform-led transformation capabilities.

cognizant

In December 2025, Cognizant opened a new AI Lab and Cognizant Moment™ Studio in Bengaluru, India, as part of its ongoing $1 billion investment in Gen AI initiatives. These innovation hubs focus on multi-agent systems, decisioning platforms, responsible AI, and enterprise AI engineering.

tcs TATA CONSULTANCY SERVICES

Over the past year, TCS has focused on upskilling its workforce for an agentic AI-led delivery model, with over 2,000 associates certified in supply chain domains. In 2025, more than 20,000 FTEs gained AI and design thinking skills.

Capgemini

In July 2025, Capgemini announced the $3.3 billion acquisition of WNS to strengthen its position in agentic AI-powered intelligent operations, combining Capgemini's consulting, technology, and platform capabilities with WNS's business process and industry expertise.

Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

Service providers are embedding AI, Gen AI, and agentic capabilities directly into supply chain execution, moving from decision support to autonomous operations

Key market direction

- Shift from standalone automation initiatives to AI-embedded operational execution models
- AI embedded across the entire supply chain value chain—planning, inventory, order management, logistics, aftermarket, and compliance
- Rise of predictive sensing, touchless operations, anomaly detection, autonomous exception handling, and closed-loop optimization
- Real-time orchestration through control towers and command centers
- Shift from transactional BPO toward outcome-based managed operations, human-agent collaboration, and closed-loop decision intelligence

Agentic AI and autonomous execution

- AI agents proactively detect disruptions and trigger corrective actions
- Policy-driven autonomous decision engines with human-in-the-loop governance
- Continuous learning models improving execution outcomes over time
- Integrated orchestration across ERP, SCM, CRM, logistics, and partner ecosystems

Provider examples

genpact	• Demand Planning Agent and Inventory Configuration Agent deployment • AI-powered returns management and field support assistants • Agentic AI-led orchestration across planning and order management
Infosys	• AI-enabled purchase order (PO) review automation and multilingual conversational assistants • Autonomous sourcing, supplier negotiations, and procurement optimization agents • AI-powered repair operations, cash flow, and sustainability reporting
HCLTech	• Agentic AI-led order allocation and backorder management automation • AI agent-enabled pricing, promotions, and tax compliance • Gen AI-powered logistics control towers and case resolution
wipro	• Agentic AI-driven sales order automation and fulfillment assistants • Gen AI-powered supplier knowledge engines and agent support tools • AI-enabled demand forecasting, training, and digital concierge solutions

Supply chain providers are transitioning from AI-assisted automation to agentic and AI-native operating models, enabling autonomous sensing, decision-making, and execution across core supply chain workflows.

Source: Avasant Supply Chain Operations Process Transformation RadarView Survey January–April 2026

Service provider profiles

Accenture: RadarView profile

AVASANT RADARVIEW™ LEADER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★★

Future-proofing ★★★★★

Combines advisory-led strategy with execution and leverages its proprietary platforms, such as SynOps and myConcerto, for its supply chain offerings.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: 28+ supply chain and operations innovation centers globally

76% SC&O* revenue from Forbes Global 2000	25+ Supply chain technology partners

Client case studies

- Modernized operations for a multinational food corporation constrained by legacy systems and limited production visibility. Accenture digitized manufacturing and embedded real-time analytics, improving agility and scalability. The transformation increased efficiency, reduced downtime, accelerated innovation, and strengthened supply chain resilience across global markets.
- Transformed procurement for Énergir by replacing fragmented, manual processes with a digital SAP Ariba platform, standardizing workflows, and improving spend visibility. Within a year, 90% of transactions were expected to run through SAP Ariba, 78% of purchases shifted to contract channels, and digital price quoting increased 30%, driving stronger cost control and efficiency.
- Reinvented global supply chain for Mankind Pharma, addressing demand volatility, supply disruptions, and regulatory complexity across 25 markets by implementing an AI-enabled, integrated planning and sourcing platform. This reduced drug stock-outs by 75%, optimized inventory by up to 20%, and strengthened cost control, compliance, and supply reliability.

Key IP and assets

- Accenture SynOps: An AI-based process transformation suite
- Accenture myConcerto: A preconfigured solutions suite for integration and cloud migration of supply chain operations
- Supply Chain Resilience Stress Test: A joint solution with MIT for supply chain risk mitigation
- Supply Chain Control Tower: A supply chain automation and visibility solution

Key partnerships

Supply chain platform vendors

BlueYonder, e2open, coupa, ORACLE, KINAXIS, SAP, o9

Technology partners

aws, Google, Microsoft, splunk>

Sample clients

- A multinational food corporation
- Énergir
- Mankind Pharma
- A high-tech firm
- A North American retailer
- A global chemical manufacturer
- Blue Diamond Growers
- A food marketing and distribution company
- A global healthcare technology company
- A semiconductor supplier

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

SC&O: Supply chain and operations

Accenture: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Accenture offers end-to-end supply chain operations business process transformation capabilities spanning advisory-led strategy through execution, supported by integrated data, analytics, and digital technologies across planning, sourcing, manufacturing, and fulfillment functions.
- It leverages digital twin-enabled supply chain models to support scenario planning, proactive risk mitigation, and continuous performance optimization, enabling clients to transition toward autonomous and resilient operating environments.
- Accenture operationalizes supply chain planning through concurrent planning environments that connect demand, supply, and inventory decisions using a common data model, enabling cross-functional trade-off decisions between service levels, cost, and working capital within execution timelines.
- Within managed services engagements, Accenture embeds process instrumentation layers across planning and procurement operations to capture transactional and cycle-time performance data at execution points. This enables continuous tracking against defined service levels, supports root-cause identification of service degradation across demand planning, replenishment, and sourcing workflows, and facilitates closed-loop remediation through workflow-level interventions.

Future-proofing ★★★★★

Domain ecosystem

- In December 2025, Accenture partnered with OpenAI to support enterprise adoption of agent-based AI systems across the supply chain. The collaboration includes deploying tailored AI agents for workflow automation and decision-making support. In May 2025, it expanded its collaboration with SAP to jointly deliver preconfigured cloud transformation offerings to enable connected planning and execution environments within enterprise operations.
- In October 2025, it extended its partnership with AWS to support AI-enabled modernization of enterprise platforms through joint cloud and data architecture deployments, which can be leveraged to support supply chain planning, fulfillment, and procurement process environments.

Investments and innovation

- Accenture is strengthening its supply chain capabilities through targeted acquisitions. In July 2025, Accenture acquired SYSTEMA to expand its manufacturing automation capabilities, strengthening its ability to support material flow automation, production coordination, and manufacturing execution across supply chain environments. In February 2025, it acquired Staufen AG to enhance value chain optimization for discrete manufacturing clients.
- Accenture introduced its Physical AI Orchestrator platform, combining digital twin models, AI agents, and real-time operational data to simulate warehouse and factory environments, enabling evaluation of layout configurations, throughput optimization, and resource allocation across fulfillment and production operations.

Arvato: RadarView profile

arvato

AVASANT RADARVIEW™ DISRUPTOR
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★★

Expanded its global logistics footprint with new distribution facilities across Türkiye, Germany, the US, and China, along with investments in capabilities such as bonded warehousing.

Practice overview

- Practice size: 18,000+
- Active clients: N/A
- Delivery highlights: Presence in 100 locations in 20 countries

~50 R&D experts	86 Warehouse locations worldwide

Client case studies

- Optimized Europe-wide fulfillment for Elli to manage complex B2B and B2C distribution across 30 countries. Arvato implemented end-to-end logistics, including warehousing, transport, returns, and a custom webstore. The solution streamlined order processing, improved delivery reliability, and enabled scalable growth in electric mobility.
- Expanded and automated logistics for H&M Group in Eastern Europe by upgrading the Stryków distribution center. The transformation increased storage capacity, boosted throughput by 30%, and improved e-commerce fulfillment capabilities. The enhanced operation enabled faster deliveries and scalable B2B and B2C distribution across the region.
- Streamlined global logistics for Sennheiser by centralizing and enhancing its distribution network to meet rising e-commerce demand. Upgrades included modern warehouse systems, omnichannel order fulfillment, and improved returns handling. This increased operational efficiency, boosted delivery speed and accuracy, and enabled scalable support for both retail and D2C channels.

Key IP and assets

- Mediverse: A marketplace solution for healthcare manufacturers and buyers
- SLOT: An internal warehouse management solution
- Arvato DMS: An internal distribution management system
- Arvato DOT: A mobile app facilitating order fulfillment from stores to customers
- Omniens: A multichannel order and stock management app

Key partnerships

Supply chain platform vendors

channeladvisor, OVERHAUL

Technology partners

Microsoft, bsi, Enterprise Bot

Sample clients

- Elli
- H&M Group
- Sennheiser
- Victron Energy
- Deutsche Telekom
- Otsuka
- HARMAN International
- Boston Dynamics
- Olympus
- Rituals Cosmetics

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

B2B: Business-to-business; B2C: Business-to-consumer; D2C: Direct-to-consumer

Arvato: RadarView profile

Analyst insights

Practice maturity ★★★

- Arvato specializes in third-party logistics (3PL), delivering integrated supply chain operations across warehousing, fulfillment, and transportation functions through standardized execution frameworks that support order processing, inventory control, and returns management across multiclient environments.
- It supports multinode fulfillment through its proprietary Omniens order management platform, enabling orchestration of inventory across multiple stock locations and execution of rule-based order routing across online, store, and marketplace sales channels. Additionally, it applies control tower–enabled monitoring across warehouse and distribution workflows to track delivery status and identify execution-stage deviations, enabling operational interventions across transport and last-mile delivery processes.
- Arvato integrates cloud-based warehouse management platforms across geographically dispersed distribution centers to support real-time inventory visibility and execution of warehousing, transport, refurbishment, and returns management activities.
- Its delivery model incorporates control tower-enabled coordination across warehouse and transport functions to manage operational exceptions related to orders.

Future-proofing ★★★

Domain ecosystem

- In December 2025, Arvato partnered with Geek+ to deploy Goods-to-Person robotic automation at its Poznań (Poland) logistics center, utilizing P800 picking robots to support flexible scaling of order-picking operations and storage optimization across e-commerce fulfillment workflows.
- In 2024, Arvato partnered with Boston Dynamics to deploy Stretch robots for automated inbound container unloading at its Louisville logistics campus and collaborated with Nomagic to integrate AI-driven robotic item-picking solutions within AutoStore-enabled fulfillment environments, supporting automated order picking and returns replenishment across warehouse execution workflows.

Investments and innovation

- In 2025–2026, Arvato expanded its global logistics footprint through the launch of new distribution and fulfillment facilities across Türkiye, Germany (Frankfurt), the US (Easton, Pennsylvania), and China. These investments are aimed at increasing warehousing capacity and enabling execution of omnichannel fulfillment workflows, including inbound handling, inventory management, outbound shipment, and returns processing across multiregional distribution networks.
- It has also expanded into specialized logistics environments through investments in cross-border bonded warehousing in Türkiye, hyperscaler infrastructure logistics capabilities in the UAE, and the expansion of its healthcare logistics campus in Harsewinkel to support regulated and high-value supply chain environments.

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Blue Yonder: RadarView profile

BlueYonder

AVASANT RADARVIEW™ TECH PIONEER Supply Chain Operations Business Process Transformation 2026

Has pushed beyond forward logistics with its acquisition of Optoro and investments in warehouse intelligence, positioning it as the vendor that addresses the full life cycle from fulfillment through returns and recommerce.

Practice overview

- Practice size: 8,000+
- Active clients: 3,000+
- Delivery highlights: Presence in 86 countries across the world

$2B	22
Invested in supply chain AI and innovation	Years of experience

Case studies

- Transformed Amway's global supply chain by implementing its SaaS-based solution in over 50 warehouses, resulting in improved agility, standardized processes, enhanced performance, optimized inventory, and reduced cost of ownership.

Sample clients

- Amway
- Morrisons
- Driscoll's
- Walgreens
- AEON
- Bayer

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Key IP and assets

Blue Yonder Platform: A cloud-native, end-to-end supply chain platform that unifies processes on a common data cloud.

Key partnerships

Snowflake, EY, Deloitte, PwC, Accenture, Microsoft

Analyst insights

- Blue Yonder is an AI-driven digital operations provider that enables end-to-end planning, execution, and fulfillment across enterprise value chains. It supports a wide range of capabilities including demand forecasting, inventory optimization, logistics, and order management. Additionally, it also extends into retail and omnichannel commerce, enabling seamless customer-centric operations.
- It integrates execution capabilities (warehouse, transportation, order management) with planning outputs, enabling seamless transition from plan to execution. This reduces delays in fulfillment, improves logistics efficiency, and enhances service levels across networks.
- It has introduced agentic AI capabilities within its Luminate Platform through Cognitive Solutions and specialized AI agents, which autonomously analyze planning and execution data, identify root causes of disruptions, and recommend or execute corrective actions. These agents enable machine-speed decision-making (see–analyze–decide–act), reduce decision latency, and support continuous optimization, ultimately improving agility, cost efficiency, and responsiveness in complex, real-time environments.
- In August 2025, the Blue Yonder acquisition of Optoro helped it expand into returns management and reverse logistics. This strengthens its capabilities in handling end-to-end returns, recommerce, and sustainability-driven value recovery, aligning with growing enterprise focus on managing returns due to cost and operational impact. The acquisition, along with investments in warehouse intelligence and AI, improves visibility and decision-making in warehouse operations, extending its scope beyond forward logistics.

Darker color indicates higher value chain coverage through digital services

Capgemini: RadarView profile

Capgemini

AVASANT RADARVIEW™ INNOVATOR
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★

Future-proofing ★★★★

Investing heavily in agentic and Gen AI, supported by partnerships and acquisitions such as WNS, to scale AI-driven, data-centric supply chain operations globally.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Overall presence in nearly 50 countries worldwide

~75% Fortune 500 companies served

50%–70% Reduction in operating costs

Client case studies

- Redesigned demand planning and external manufacturing processes for Johnson & Johnson, introducing standardized workflows and collaborative planning mechanisms with external partners. This improved planning transparency and supplier coordination, with forecast accuracy improving by 15%, unit fill rates reaching 97%, and master data accuracy exceeding 98%.
- Implemented SAP S/4HANA and SAP Integrated Business Planning as part of the Optimus transformation program for Twinings Ovaltine to modernize its digital supply chain core. This integrated demand, supply, and inventory planning, which enabled improved planning accuracy, enhanced cross-functional collaboration, and better operational visibility across the globe.
- Implemented a Gen AI-powered forecasting solution on Google Cloud for a global conglomerate, including a conversational AI assistant for supply chain data queries and generating insights. The solution automated data analysis and scenario evaluation, further improving forecasting efficiency, accelerating decision-making, and enhancing planners' ability to generate data-driven insights.

Key IP and assets

- Continuous touchless planning framework: A supply chain planning framework
- Digital Global Enterprise Model (D-GEM): An architecture for business process transformation
- i360 analytics: A solution to streamline spend analytics, tail spend management, strategic sourcing, and risk analysis

Key partnerships

Supply chain platform vendors

ORACLE, Manhattan Associates, coupa, SAP, e2open, BlueYonder, Kinaxis

Technology partners

Microsoft, celonis, Automation Anywhere, SS&C blueprism, UiPath, aws

Sample clients

- Johnson & Johnson
- Twinings Ovaltine
- A global conglomerate
- Brose
- Red Eléctrica
- CONA Services
- Iveco Group
- A consumer products organization
- A European life sciences company

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

Capgemini: RadarView profile

Analyst insights

Practice maturity ★★★★

- Capgemini's Intelligent Supply Chain Operations (ISCO) serves as the backbone of its supply chain services to enable data-powered decision-making and process automation. Combined with logistics expertise from partners such as Kuehne + Nagel, ISCO supports end-to-end supply chain operations.
- Part of Capgemini Engineering's global service line, the supply chain and quality management offering helps organizations design, implement, and optimize industrial supply chains by improving supplier collaboration, procurement, logistics, and operational processes. It focuses on improving supplier collaboration, procurement, logistics, compliance, and operational efficiency across the end-to-end supply chain.
- Its supply chain planning is a cloud-native, AI-driven planning solution (powered by Oracle Cloud) that integrates demand, supply, and production planning across enterprise systems. It enables AI-based forecasting, scenario modeling, inventory optimization, and real-time collaboration.
- Its autonomous supply chain solution helps enterprises transform into integrated, AI-enabled, and touchless operations across processes. It leverages intelligent automation, analytics, and digital technologies to improve demand forecasting, optimize logistics, enhance risk visibility, and increase fulfillment reliability.

Future-proofing ★★★★

Domain ecosystem

- In May 2025, Capgemini partnered with Mistral AI and SAP to deliver Gen AI solutions for highly regulated industries such as financial services, public sector, A&D, and energy. It combines Mistral AI's models with SAP business technology platform and Capgemini's transformation expertise to enable compliant AI deployment, with more than 50 prebuilt enterprise use cases for business process optimization and decision support.
- In 2025, it partnered with Prewave, an AI-driven supply chain risk intelligence platform, to enhance supply chain risk management, leveraging AI, predictive analytics, and real-time monitoring to identify disruptions, analyze supplier risks, and support proactive mitigation and compliance.

Investments and innovation

- In July 2025, Capgemini announced the $3.3 billion acquisition of WNS to strengthen its position in agentic AI-powered intelligent operations, combining Capgemini's consulting, technology, and platform capabilities with WNS's business process and industry expertise. The deal aims to help enterprises transform operations using AI-driven automation and analytics, while expanding Capgemini's scale, sector expertise, and presence in key markets such as the US.
- It invests in AI, advanced analytics, and automation to enable data-driven, touchless supply chain operations, improving decision-making, agility, and operational efficiency across planning, procurement, logistics, and fulfillment.

Cognizant: RadarView profile

cognizant

AVASANT RADARVIEW™ DISRUPTOR Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★★

Investing in AI with initiatives such as opening a new AI Lab and expanding its partnership with Adobe to integrate Gen AI capabilities within enterprise supply chain workflows.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Presence in over 35 countries across the Americas, Europe, and APAC

10,000+ Supply chain solutions experts	4,000+ Process consultants

Client case studies

- Enabled touchless order processing for a global industrial manufacturer burdened by manual, error-prone order management and limited visibility. It implemented a solution to automate validation, orchestration, and exception handling across systems. This reduced manual intervention, accelerated order cycle times, improved accuracy, and enhanced customer experience while lowering costs.
- Integrated manufacturing processes and ERP systems for a global industrial company struggling with disconnected operations. Cognizant unified shop-floor systems with enterprise ERP, enabling real-time data flow across production, inventory, and finance. The transformation improved process efficiency, reduced manual reconciliation, enhanced reporting accuracy, and strengthened control.
- Accelerated global expansion for a direct-to-consumer streaming company facing platform scalability limits and fragmented customer data. It helped modernize its platform, streamline content delivery, and unify customer insights to support rapid subscriber growth. This improved platform performance, reduced time-to-launch, and enhanced viewer experience, fueling expansion.

Key IP and assets

- Outbound Logistics Suite: A digital transportation and logistics strategy framework
- Supply chain visibility framework: A supply chain tracking tool for the life sciences industry
- Retail Supply Chain Solution: A supply chain planning, execution, and visibility solution for the retail industry
- Cognizant Digital Twin Platform: A platform offering a real-time virtual representation of assets

Key partnerships

Supply chain platform vendors

Kinaxis, Coupa, BlueYonder, SAP, Oracle, Manhattan Associates, Icertis

Technology partners

UiPath, aws

Sample clients

- A global industrial manufacturer
- A global industrial company
- A direct-to-consumer streaming company
- A toy manufacturer
- A global health, beauty, and home care company
- A US-based corporate properties group
- A mining organization
- Future Group
- A European pharma company
- A multibrand restaurant in the US

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

AVASANT

Cognizant: RadarView profile

Analyst insights

Practice maturity ★★★

- Cognizant operationalizes supply chain transformation through digitally enabled operating models that integrate planning, procurement, manufacturing support, and logistics execution workflows using control tower environments and IoT-based visibility layers to improve responsiveness across production and distribution. It has over 10,000 solution experts and 4,000 process consultants who provide supply chain services in over 20 countries worldwide through onshore, offshore, and nearshore centers.
- It supports execution-stage supply chain operations through control tower-enabled environments that consolidate data across order management, transport coordination, and fulfillment workflows to enable exception-based monitoring and resolution of operational disruptions.
- Cognizant Digital Order Management is a platform-enabled solution that orchestrates multichannel ordering and fulfillment across supply chains by aggregating orders from disparate systems into a unified view, integrating real-time inventory status and geographic delivery data, and applying smart analytics, ML, and intelligent process automation to reduce order errors, shorten cycle times, improve on-time and in-full delivery performance, and enable cost-efficient execution.

Future-proofing ★★★

Domain ecosystem

- In January 2026, Cognizant expanded its partnership with Adobe to integrate generative AI capabilities within enterprise content supply chain workflows. The collaboration embeds Adobe Firefly tools into operational processes to enable automated content creation with brand governance and compliance controls.
- In August 2025, it collaborated with SAP to help organizations modernize supply chain operations using the RISE with SAP offering, which enables migration from legacy on-premises systems to cloud-based SAP S/4HANA environments to improve operational visibility and planning agility.

Investments and innovation

- In December 2025, Cognizant opened a new AI Lab and Cognizant Moment™ Studio in Bengaluru, India, as part of its ongoing $1 billion investment in Gen AI initiatives. These innovation hubs focus on multi-agent systems, decisioning platforms, responsible AI, and enterprise AI engineering.
- Additionally, in December 2025, it announced an expanded multiyear strategic partnership with Microsoft to cobuild AI-powered solutions and embed agentic AI (via Copilot, AI services on Azure) into enterprise workflows and industry platforms. This collaboration aims to scale innovation and accelerate operational modernization across key sectors, including manufacturing, retail, and supply chains, strengthening Cognizant’s investment in integrated cloud AI transformation.

EXL: RadarView profile

EXL

AVASANT RADARVIEW™ CHALLENGER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★

Future-proofing ★★★

Investing in AI-driven supply chain risk and tariff analytics solutions that simulate global tariff impacts, enabling organizations to optimize sourcing strategies and improve resilience.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: 50+ enterprise-wide global delivery centers

20%	11%
Reduction in logistics costs	Reduction in out-of-stock instances

Client case studies

- Implemented a real-time analytics and visibility platform for a global premium beauty retailer to strengthen supply chain and vendor management. The solution enabled shipment tracking and lead-time optimization, reducing inventory lead time by over 60%, while improved SKU forecasting and inventory reporting accelerated inventory issue resolution by 60%.
- Built a centralized supply chain dashboard for a Midwest-based academic medical center during the COVID-19 pandemic. By integrating data from multiple enterprise systems, the platform enabled improved monitoring and management of critical medical supplies, including vaccines and personal protective equipment.
- Supported a global wholesale food distributor in establishing a transformation CoE to drive operational improvements across finance, supply chain, HR, and marketing. The initiative strengthened governance for more than 60 strategic programs and leveraged analytics to enable more informed enterprise-wide decision-making.

Key IP and assets

- EXELIA.AI™: An AI tool for customer interactions
- XTRAKTO.AI™: An AI document processing solution
- EXL Revenue Leakage Preventer: An AI and analytics solution to minimize revenue leakage for logistics carriers
- EXL CONNECx: An omnichannel customer experience platform

Key partnerships

Technology partners

aws, Google, servicenow, UiPath, SS&C blueprism, salesforce, ABBYY, VERINT

Sample clients

- A global premium beauty retailer
- A global wholesale food distributor
- A Midwest-based academic medical center

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

EXL: RadarView profile

Analyst insights

Practice maturity ★★

- EXL's supply chain practice covers planning, sourcing, manufacturing support, logistics, and distribution operations. It supports operational activities such as purchase order creation, SKU management, demand planning support, vendor coordination, shipment tracking, and inventory analytics, complemented by analytics-led decision support across forecasting, spend management, and network optimization.
- It combines operational process management with analytics and AI capabilities to enable data-driven supply chain decision-making. EXL provides analytics solutions across procurement, manufacturing, logistics, and network planning functions, including vendor performance analytics, budgeting analytics, sales forecasting, inventory health monitoring, transportation optimization, and warehouse footprint optimization. It provides analytics-based insights to support supply chain planning decisions, including product cannibalization analysis, demand forecasting, and new product introduction planning.
- EXL plays a key role in coordinating with supplier ecosystems on behalf of clients. It monitors purchase orders, shipping timelines, EDI* data flows, and vendor compliance requirements, while also identifying shipment delays, ASN violations, and packaging issues, improving vendor adherence to operational guidelines.

Future-proofing ★★★

Domain ecosystem

- EXL works closely with transportation and logistics organizations to support operational transformation initiatives. In October 2025, it collaborated with Schneider Logistics to address complex transportation management challenges by leveraging analytics and digital transformation capabilities. The aim of the partnership is to deliver operational improvements in areas such as freight optimization, network visibility, and operational performance monitoring.
- In 2025, it partnered with Supply Chain Intelligence, LLC to strengthen its supply chain advisory capabilities. Supply Chain Intelligence will provide advisory and transformation expertise, while EXL contributes analytics, digital, and operational capabilities to help organizations modernize decision-making.

Investments and innovation

- EXL has developed a Gen AI-enabled tariff risk resilience solution to help organizations evaluate the impact of global tariffs on supply chain cost structures. The platform simulates tariff impacts and generates optimization recommendations such as supplier substitution to mitigate cost increases.
- It has also developed AI-enabled supply chain analytics solutions that help organizations analyze tariff exposure, forecast cost impacts, and optimize sourcing strategies to allow enterprises to evaluate supply chain risks and make rapid operational adjustments using predictive analytics and scenario modeling.
- EXL plans to establish new delivery centers in India to support growing demand for AI-driven digital operations and analytics services.

*EDI: Electronic data interchange; ASN: Advance ship notice

EY: RadarView profile

EY

AVASANT RADARVIEW™
CHALLENGER
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★

Enables supply chain transformation through its Reinvention Framework, blockchain traceability platforms, and AI-driven order management and digital manufacturing solutions.

Practice overview

- Practice size: 600+
- Active clients: N/A
- Delivery highlights: Presence in North America, APAC, EMEA, and Latin America

93%	$15B+
Metrics reduction via performance optimization	Savings delivered via P&G partnership

Client case studies

- Enhanced supply chain performance for a global electronics manufacturer facing fragmented planning and inefficient distribution by optimizing production-to-customer flows. This reduced average transportation distance by 50%, cut excess inventory by 27%, and lowered transport carbon emissions by 15%, improving service responsiveness and supply chain sustainability.
- Transformed supply chain operations for an Indian multinational facing procurement inefficiencies and limited end-to-end visibility. EY streamlined sourcing, planning, and logistics through integrated operating models and advanced analytics. This improved supplier collaboration, reduced operational inefficiencies, and enabled a more agile and scalable supply chain.
- Reinvented supply chain operations for a global food company facing rising demand volatility by redesigning planning, inventory, and fulfillment processes. The transformation improved product availability, strengthened responsiveness to customer demand, and enhanced overall supply chain efficiency while supporting more reliable service for food retail customers.

Key IP and assets

- EY Supply Chain Intelligence Platform: A global supply chain analytics engine that provides end-to-end visibility
- EY Asterisk: A SaaS-based platform to drive business transformation in supply chains
- VC Sync™: A supply chain synchronization tool
- EY OpsChain Traceability: A blockchain-based platform to tokenize and track physical assets across supply chains

Key partnerships

Supply chain platform vendors

SAP, BLACKLINE, BlueYonder, P&G, o9, Kinaxis

Technology partners

Microsoft, UiPath, snowflake, IBM, servicenow

Sample clients

- A global electronics manufacturer
- An Indian multinational company
- A global food company
- A global beverage company
- A global manufacturer
- LT Foods
- DuPont
- An Indian FMCG company
- Government of Odisha

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

EY: RadarView profile

Analyst insights

Practice maturity ★★★

- EY's supply chain capabilities are built around its Supply Chain Reinvention Framework, which focuses on transitioning from linear chains to digitally interconnected, autonomous ecosystems. It also delivers integrated consulting services that address the entire value chain, including supply chain strategy design, planning, procurement, manufacturing, logistics, and inventory optimization.
- Its blockchain-enabled supply chain transparency platform, EY OpsChain Traceability, enables enterprises to tokenize and track physical assets across global supply chains. The platform provides a secure and immutable record of transactions, helping organizations across multiparty supply chain ecosystems.
- In addition to consulting-led transformation programs, EY also offers managed services for supply chain operations, helping enterprises maintain resilient supply ecosystems, improve decision-making through analytics, and shift supply chain management toward a strategic value-generating function.
- EY has developed digital platforms such as the Supply Chain Intelligence Platform that provide enterprise-wide analytics and benchmarking capabilities. This enables organizations to gain real-time visibility across supply chain operations using quantitative analytics, process mining, and performance diagnostics.

Future-proofing ★★

Domain ecosystem

- EY maintains alliances with major enterprise technology providers, such as Microsoft, SAP, IBM, ServiceNow, and Snowflake, to strengthen its supply chain optimization offerings. These partnerships help integrate AI, automation, analytics, and enterprise cloud applications into supply chain transformation services.
- It has strengthened its supply chain execution and logistics capabilities through its alliance with Blue Yonder. The partnership enables EY to support enterprises in deploying AI-driven demand planning, inventory optimization, and warehouse management solutions that improve operational efficiency and help organizations respond more effectively to supply chain disruptions.

Investments and innovation

- EY has developed an intelligent order management system, an AI/ML-based solution for consumer goods companies that improves SKU availability and market presence by prioritizing high-demand products, reducing stockouts, and enhancing OTIF and same-day delivery performance. The solution also lowers delivered and per-order costs through better vehicle utilization, optimized logistics, and more efficient order processing.
- It also invests in digital manufacturing and smart factory initiatives, which integrate technologies such as industrial IoT, advanced analytics, virtual reality, and AI-driven predictive insights to improve shop-floor operations.

OTIF: On-time in-full

AVASANT

Genpact: RadarView profile

genpact

AVASANT RADARVIEW™ LEADER
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★★

Future-proofing ★★★★★

Shows depth in planning, order management, and aftermarket services, with mature embedding of AI and digital twins, such as order assist, into core operational workflows.

Practice overview

- Practice size: 17,000+
- Active clients: 310+
- Delivery highlights: Delivery and excellence centers spread across 15 countries worldwide

1,400+ Certified ServiceNow professionals

20%–25% Supply chain BPO growth, Dec. 2024–2025

Client case studies

- Supported a global food and beverage client facing fragmented planning processes and a lack of visibility by implementing an integrated planning center. It set up a central planning hub with a cross-functional CoE, deployed digital accelerators for reporting and forecasting, and managed operations. This resulted in €85M in cost savings, a 53% reduction in cycle time, and a 25% reduction in order blocks.
- Helped a global solar panel manufacturer facing limited visibility and a lack of tracking across a complex, multiparty supply chain by implementing a Celonis-based digital twin app. This enabled real-time asset tracking, SLA-driven returns, demand forecasting, and process orchestration, reducing excess stock and enhancing visibility. This resulted in efficient management of a returnable asset pool of over $60M.
- Addressed fragmented returns management and lack of circular economy capabilities for a global e-commerce client by deploying an AI-powered, omnichannel returns management solution. It integrated logistics, payments, repair ecosystems, and self-service interfaces with virtual agents. This streamlined returns processing and achieved a 90% reduction in GHG emissions.

Key IP and assets

- Cora OrderAssist: A digital order management system
- Control Tower and Digital Twin Solution: An AI solution for real-time supply chain visibility
- OTIF Analyzer: An analytics tool for on-time and in-full order
- Cora SeQuence: An intelligent business process management suite
- Supply chain risk AI solution: An end-to-end agentic AI solution to assess supply chain risk

Key partnerships

Supply chain platform vendors

ORACLE, Kinaxis, resilinc, SAP, o9, BlueYonder, e2open

Technology partners

Automation Anywhere, UiPath, celonis, SS&C blueprism

Sample clients

- A global food and beverage client
- A global solar panel manufacturer
- A global e-commerce client
- A multinational pet food company
- A North American CPG firm
- A scientific research, healthcare, and education products and services provider
- A US doors and windows manufacturer
- A US retailer

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

AVASANT

Genpact: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Genpact provides end-to-end service breadth across the SCOR value chain (plan, source, make, deliver, and return) delivered through a combination of managed services, analytics, and AI-enabled solutions. It positions it as a unified SCM services line rather than siloed functional towers, with delivery aligned to outcomes.
- It exhibits strong depth in planning, order management, and aftermarket services. This is complemented by AI-led capabilities such as demand planning agents, inventory optimization, and order assist tools, reflecting maturity in embedding intelligence into core operational layers rather than peripheral automation.
- Genpact is advancing toward a semi-autonomous supply chain operating model through agentic AI, where AI agents augment or replace manual decision-making across planning and execution processes. It indicates a maturity in embedding AI into core operations rather than using it as a standalone layer.
- Genpact operates a global delivery model with offshore hubs in India and an additional presence across LATAM and Europe. It adjusts talent allocation, including planning and global trade roles, based on demand requirements, supporting flexibility in service delivery and resource deployment.
- It serves various industries, with manufacturing and telecom representing the largest share of its supply chain revenue.

Future-proofing ★★★★★

Domain ecosystem

- Genpact maintains a broad ecosystem of supply chain technology partners across planning, execution, and analytics, including Kinaxis, o9 Solutions, SAP, Oracle, ServiceNow, Salesforce, Celonis, and AWS. These partnerships support delivery across supply chain functions, enabling integration with client systems.
- Over the past year, it collaborated with Microsoft, AWS, Salesforce, and Google Cloud to support supply chain orchestration through cloud-enabled platforms and scalable infrastructure. It also leveraged XponentL's expertise in data products and AI to strengthen its data and analytics capabilities, supporting enhanced supply chain solutions and service delivery.

Investments and innovation

- In January 2025, Genpact launched an AI-driven Smart Command Center in Japan to centralize and transform equipment service and supply chain operations. Built through a strategic partnership with Coca-Cola Bottlers Japan and Thinkrun, it helps optimize end-to-end supply chain processes and decision-making.
- Genpact is investing in Gen AI and agentic AI capabilities, with over 30 AI agents and 10 connectors and accelerators developed as proprietary IP to address supply chain use cases across planning, execution, and aftermarket functions. These include solutions such as the AI Order Assist agent for order management, deployed across multiple clients, reflecting the firm's focus on embedding AI-driven automation and orchestration into core supply chain operations.

*SCOR: Supply chain operations reference (model)

AVASANT

GEP: RadarView profile

GEP

AVASANT RADARVIEW™
DISRUPTOR
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★★

Enables AI-driven supply chain and procurement transformation through its NEXXE platform, control tower visibility, and agentic AI orchestration capabilities.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: 27 offices spread across North America, South America, Europe, and Asia

$525B+
Annual spend

30+
Industries catered

Client case studies

- Helped a global high-tech manufacturer mitigate sudden tariff spikes that threatened margins and supply continuity. By reconfiguring its cross-border network and shifting production between Mexico and Czechia, it minimized tariff exposure across fluctuating duty cycles, maintained uninterrupted US service, protected margins, and established a repeatable playbook for future trade volatility.
- Transformed transportation operations for a Mexican pharmaceutical company facing rising logistics costs, fragmented carrier management, and service failures. GEP designed a unified data-driven transport operating model, consolidating 300 suppliers, improving on-time deliveries by 3%–8%, reducing operational extras by 4%–8%, and delivering overall transportation cost savings of 10%–20%.
- Helped a Fortune 500 US manufacturer reduce tariff exposure and China dependency by mapping supplier risk, modeling total cost-to-serve scenarios, and implementing a dual- and nearshoring strategy. This reduced lead times by 20%–35%, delivered 20% ex-works savings, achieved over 100% landed cost savings, and established a dual-source supply network with real-time risk monitoring.

Key IP and assets

- GEP NEXXE™: An end-to-end supply chain software for planning, visibility, control tower, warehouse, and inventory management and collaboration
- GEP GREEN™: An ESG data visualization and reporting tool
- GEP Qi™: An agentic AI orchestration engine to automate and coordinate supply chain workflows
- GEP SMART: A cloud-based platform for source-to-pay

Key partnerships

Technology partners

GRMS Global Risk Management Solutions, ecovadis, RAPIDRATINGS, Microsoft, whatfix, dun & bradstreet, GRAINGER, PAGERO

Sample clients

- A global high-tech manufacturer
- A Mexican pharmaceutical company
- A Fortune 500 US manufacturer
- A retail company
- A Fortune 500 tech company
- A Fortune 500 global oil and gas company
- A Fortune 100 oil and gas company
- A food manufacturer
- A global pharma company

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

GEP: RadarView profile

Analyst insights

Practice maturity ★★★

- GEP delivers supply chain transformation through a unified digital platform architecture that integrates planning, visibility, collaboration, and execution capabilities. Its GEP NEXXE platform provides an AI-powered, cloud-native environment that connects demand planning, logistics, inventory management, and supplier collaboration on a single system, enabling enterprises to manage complex global supply networks with greater agility and operational control.
- It offers end-to-end supply chain visibility and control-tower capabilities to orchestrate operations across multi-tier supply networks. Through the digital control tower functionality, GEP enables real-time monitoring of supply chain events, predictive alerts, and collaborative issue resolution across suppliers, logistics partners, and internal teams to improve responsiveness to disruptions.
- It embeds AI and ML across supply chain processes to enhance predictive decision-making and operational intelligence. Platforms such as GEP MINERVA apply AI-driven analytics for forecasting, anomaly detection, and decision support, helping enterprises anticipate supply chain risks and optimize planning processes.
- It has also built logistics and transportation visibility capabilities to track materials and shipments through its GEP NEXXE platform's logistics visibility tools.

Future-proofing ★★★

Domain ecosystem

- GEP collaborates with major enterprise technology vendors and digital platforms to strengthen interoperability and extend the functionality of its supply chain solutions. Its partnership with Microsoft, Amazon Business, and other enterprise technology firms enables GEP platforms to integrate with broader enterprise ecosystems, supporting cloud scalability, procurement marketplaces, and ERP connectivity.
- Its partnership with TealBook integrates AI-driven supplier intelligence and enriched supplier data into GEP's sourcing and supplier management workflows. It also partners with RapidRatings, integrating financial health and risk transparency data into procurement and supplier management processes.

Investments and innovation

- GEP has expanded its AI innovation road map with the launch of GEP Qi, an agentic AI orchestration engine designed to automate and coordinate procurement and supply chain processes. Introduced in 2025, GEP Qi deploys networks of intelligent AI agents that can autonomously execute tasks such as sourcing, supplier management, contract creation, and procurement decision support, enabling enterprises to shift from manual workflows toward AI-driven orchestration.
- It is strengthening integration and interoperability through its GEP QUANTUM platform. Its agentic integration framework uses prebuilt connectors and AI-driven orchestration to connect ERP systems, supplier networks, and logistics platforms, helping organizations unify fragmented supply chain technology environments.

HCLTech: RadarView profile

HCLTech

AVASANT RADARVIEW™ INNOVATOR
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★

Future-proofing ★★★★

Has deep expertise in execution-heavy, product-centric environments, with focused investments in agentic AI platforms and control tower-led operations.

Practice overview

- Practice size: 11,000+
- Active clients: 65+
- Delivery highlights: Delivery centers in 16 countries worldwide

99% Order fulfillment accuracy for a client	10%–15% Supply chain BPO growth, Dec. 2024–2025

Client case studies

- Established a Customs CoE, standardized processes using Kaizen, implemented governance frameworks, enabled cross-training, and built real-time monitoring for a global pharmaceutical and medical device manufacturer. It resulted in 99.8% SLA adherence, 99.9% quality, and 400+ improvement initiatives (85+ implemented), improving efficiency and reducing errors.
- Helped a US technology company in internet services to streamline order management and sales support by implementing dashboards, restructuring processes, strengthening QA and training, and optimizing team structure, resulting in automated KPI tracking, 100% audit coverage, 33% improvement in process compliance, >92% customer satisfaction, and faster resolution timelines.
- Centralized MDM* operations, implemented automated workflows, enabled mass data uploads, and migrated legacy data to SAP for a US-based food and dairy producer who faced issues with non-standardized data. It resulted in 100% data quality, 100% SLA adherence and PO* compliance, touchless reporting, reduced costs, improved cycle times, and a unified single source of truth.

Key IP and assets

- AIForce.BizOps: An AI and agentic-based platform for supply chain process transformation
- EXACTO™: An AI/ML order and contract digitization tool
- Supply Chain Command Console: A suite of dashboards for supply chain operations visibility
- Operations Command Center (OCC): A control tower for end-to-end supply chain visibility
- TOSCANA©: A workflow solution for business processes

Key partnerships

Supply chain platform vendors

Anaplan, Kinaxis, Blue Yonder, infor, o9, Manhattan Associates, coupa

Technology partners

Automation Anywhere, tableau, celonis, Power BI

Sample clients

- A Fortune 10 oil and gas company
- A US office supplies retailer
- A multinational retail and finance company
- A global lighting products leader
- A flash memory and data storage device manufacturer
- A global elevator and escalator manufacturer
- A pharmaceutical and medical device manufacturing firm
- A public energy provider and chemicals manufacturer

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

MDM: Master data management; PO: Purchase order

HCLTech: RadarView profile

Analyst insights

Practice maturity ★★★★

- HCLTech offerings span the entire supply chain, from planning and sourcing to delivery and returns. The practice has evolved beyond its foundational strength in transactional order management to establish growing, niche capabilities in supply chain planning and a significant presence in aftermarket services, particularly in returns, spare parts, and warranty management for industries such as healthcare and high tech.
- HCLTech supports complex, product-centric supply chain environments, drawing on its engineering background and industry experience. The practice focuses on the manufacturing and healthcare & life sciences sectors, where it provides after-sales service logistics, reverse supply chains for remanufacturing, and inbound material management for engineer-to-order products. This enables coordination between clients' operations and their outsourced logistics partners.
- It has developed AI-enabled capabilities across planning, order management, and logistics, including demand sensing, scenario simulation, continuous planning, touchless order processing, intelligent document processing, and route optimization. These capabilities support a shift toward more data-driven and automated operations, improving planning accuracy, reducing manual effort, and enabling better execution performance across supply chain processes.

Future-proofing ★★★★

Domain ecosystem

- HCLTech has established a broad partner ecosystem across SCM platforms, ERP/WMS providers, and AI/automation vendors, including Blue Yonder, Kinaxis, Anaplan, o9, Infor, UiPath, and Automation Anywhere. These partnerships support end-to-end transformation across planning, logistics, visibility, and automation, with long-standing alliances and certified capabilities enabling scalable, platform-led delivery.
- In November 2025, it expanded its partnership with SAP to develop next-generation Physical AI solutions that embed AI into real-world industrial and enterprise operations, particularly across manufacturing, supply chain, and logistics focusing on use cases such as AI-driven warehouse automation and more.

Investments and innovation

- HCLTech has expanded its supply chain BPO capabilities by embedding agentic AI, Gen AI, and advanced analytics across core processes such as order management, RFx automation, invoice processing, and logistics, enabling a shift from task-level automation to value stream automation with improved productivity and cycle times. It has also enhanced its proprietary platforms (AIForce.BizOps, Operations Command Center, Toscana BPM*, EXACTO™ IDP*) with agentic orchestration, Gen AI-driven insights, and stronger governance frameworks, enabling scalable, production-grade deployment across geographies.
- It is strengthening its talent and capability development through CoEs, supporting sustainability, analytics, and transformation initiatives.

BPM: Business process management; IDP: Intelligent document processing

IBM: RadarView profile

AVASANT RADARVIEW™ INNOVATOR Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★★

Future-proofing ★★★

Delivers platform-led supply chain operations centered on its Sterling suite. Advancing agentic AI and ecosystem-driven innovation through partnerships with hyperscalers.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Supply chain delivery centers in 16 countries worldwide

3B+ Orders processed annually	99.99% Platform uptime

Client case studies

- Deployed IBM Sterling Supply Chain Insights for Lenovo to analyze supply chain data using AI, enhance visibility, improve decision-making, and provide real-time insights across operations. The solution integrates large volumes of supply chain data and proactively flags risks, significantly improving supply chain visibility and reducing disruption response time from days to minutes.
- Implemented IBM Sterling B2B Cloud Services for Whirlpool to consolidate partner connectivity and streamline transactions. This enabled real-time transaction visibility and improved collaboration with suppliers and distributors, reducing operational complexity, accelerating partner onboarding, minimizing transaction errors, and improving overall efficiency and reliability.
- Implemented IBM Sterling Order Management along with OneRail solutions for Advance Auto Parts to gain real-time inventory visibility and dynamically route orders to optimal fulfillment. As a result, the company was able to meet demand with greater accuracy, achieve a 98% on-time delivery rate, reduce transportation expenses by 12%, and grow sales by 27% for its 30-minute delivery service.

Key IP and assets

- IBM Sterling Order Management: A multichannel cloud order management solution
- IBM Sterling Supply Chain Intelligence Suite: An AI and blockchain solution with control tower and risk mitigation support
- IBM Sterling Inventory Visibility: A cloud solution that provides real-time visibility into inventory
- IBM watsonX Advisor: An NLP solution for supply chain insights

Key partnerships

Supply chain platform vendors

ORACLE, o9, SAP, Kinaxis, Manhattan Associates, coupa

Technology partners

Microsoft, Adobe, celonis, salesforce, aws

Sample clients

- Lenovo
- Whirlpool
- Advance Auto Parts
- Pandora
- Sally Beauty Holdings
- CEVA Logistics
- Trusco Nakayama
- Bestseller India
- Iberdrola
- Panasonic Connect
- Party City
- Wiwynn
- TM International Logistics

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

IBM: RadarView profile

Analyst insights

Practice maturity ★★★★

- IBM has over 30 years of experience in delivering supply chain services. It leverages capabilities across digital transformation, engineering, and consulting to provide end-to-end supply chain solutions.
- IBM Planning Analytics is an enterprise planning platform that supports real-time budgeting, forecasting, and scenario analysis. Built on the IBM TM1 engine, it enables AI-driven forecasting, integrates financial and operational planning, and helps organizations improve decision-making and align financial plans.
- IBM's $45M Impact Accelerator initiative is deploying AI, cloud, and data technologies to modernize global supply chains, focusing on improving efficiency, reducing costs, and expanding access to sustainable infrastructure. The program selected five organizations to develop AI-driven solutions addressing logistics, energy, and food systems across multiple regions. It aims to strengthen supply chain resilience while supporting sustainability and economic development.
- IBM Sterling supply chain suite enables more resilient and collaborative supply chains by connecting suppliers, partners, and fulfillment networks. It provides AI-driven insights and predictive analytics while supporting large-scale order and fulfillment operations and helping organizations respond faster to disruptions.

Future-proofing ★★★

Domain ecosystem

- In October 2025, IBM partnered with S&P Global to deploy agentic AI by integrating IBM watsonx Orchestrate with S&P Global's data and analytics. The collaboration will introduce AI agents that enhance supply chain visibility, vendor selection, and risk management by combining procurement, trade, and supplier-risk data, with the aim to automate workflows and accelerate decision-making across supply chain, procurement, finance, and insurance operations.
- IBM partners with AWS to help optimize supply chain operations through real-time analytics and advanced demand forecasting. They enable faster decision-making, reduce operational costs, and improve efficiency, while AWS's scalable cloud infrastructure enables secure, large-scale deployment and greater agility.

Investments and innovation

- In October 2025, IBM announced new AI agents available on the Oracle Fusion Applications AI Agent Marketplace to automate enterprise workflows and improve operational efficiency. The agents, such as intercompany, smart sales order entry, and requisition-to-contract, help streamline processes across finance, sales, and procurement. It also plans to launch additional supply chain agents built on watsonx Orchestrate to further automate processes across industries.
- It expanded IBM Planning Analytics to the AWS Mumbai region, enabling enterprises in India to access cloud-based planning capabilities with real-time forecasting, scenario analysis, and cross-functional planning. This helps organizations align their plans and respond more quickly to demand and supply disruptions.

Infosys: RadarView profile

Infosys

AVASANT RADARVIEW™
LEADER
Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★★

Future-proofing ★★★★

Continues to scale AI-first capabilities across order management, logistics, and commercial operations, supported by partnerships with specialists, including the March 2026 Incora alliance.

Practice overview

- Practice size: 10,900+
- Active clients: 85+
- Delivery highlights: Delivery centers in 19 countries worldwide

95%	40%–45%
On time in full (OTIF)	Reduction in cost to serve

Client case studies

- Supported a client in overcoming manual, effort-intensive purchase order (PO) review processes by implementing AI-driven PO automation using Azure Document Intelligence and SAP/Salesforce-integrated validation for end-to-end processing. This reduced manual effort by ~70%, improved TAT by 30%, saved 10,000+ hours annually, and fulfilled orders faster with enhanced customer experience.
- Helped a European B2B equipment distributor in improving efficiency across order management, returns, and warranty processes by deploying Multilingual Conversational AI, Digital Command Console, and Smart OM AI to standardize processes. This resulted in 35% productivity improvement along with better process harmonization and governance via a dedicated GPO* model.
- Enabled a downstream oil & gas client to optimize logistics and data management by deploying its ESTAR framework with AI-led order capture, automated driver assignment, and integrated onsite-offshore operations. This resulted in 45% reduction in cost to serve, 50% faster order entry, 25% reduction in trade confirmation time, improved SLA adherence, and enhanced responsiveness.

Key IP and assets

- Infosys EPOCH: A digital commerce platform
- TradeEdge Order Management: An order-to-cash solution with advanced analytics and product pricing support
- Demand Forecasting Workbench: An AI-based app for demand forecasting and stockout prediction
- Infosys Order Orchestration: An agentic AI platform for end-to-end order orchestration

Key partnerships

Supply chain platform vendors

Kinaxis, SAP, IBM, BlueYonder, coupa

Technology partners

enate, UiPath, Microsoft, Automation Anywhere

Sample clients

- A European B2B equipment distributor
- A downstream oil & gas client
- A consumer goods company
- A global hardware client
- A European aerospace firm
- A Fortune 500 electronics distributor
- A British multinational CPG firm
- A Fortune 500 American technology corporation

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

GPO: Global process owner

Infosys: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Infosys delivers integrated services spanning plan, source, make, deliver, and return functions under a unified sales, commercial, and supply chain practice. The offering covers sales operations, customer operations, revenue operations, planning operations, fulfillment operations, and services operations.
- Its consulting-led approach connects process re-engineering with digital transformation under an "AI-first, automation-led" services model. It supports phased, outcome-aligned transformations aligned to business outcomes such as cost reduction, cycle-time efficiency, and resilience improvement through joint go-to-market engagements and orchestration-led delivery.
- It has developed solution accelerators such as the Demand Forecasting Workbench and Inventory Optimizer, alongside AI-first orchestration and digital control platforms built on Azure and watsonX. Over 80% of client engagements embed AI/ML, with over 50% using Gen AI for analytics, training automation, and intelligent document processing. It emphasizes human-in-loop governance, positioning AI as an augmentation layer rather than unattended automation.
- It has a diversified delivery footprint with major centers across India, the Philippines, and the UK, enabling resiliency, language coverage, and proximity to client.

Future-proofing ★★★★

Domain ecosystem

- In March 2026, Infosys partnered with Incora to deploy AI capabilities across Incora's global supply chain operations in more than 60 countries, leveraging Infosys Topaz and EdgeVerve AI Next to modernize multi-ERP environments without disrupting operations and to strengthen its role in partner-led ecosystems.
- It is identifying and partnering with AI-first and domain-specialist firms to codevelop advanced capabilities—leveraging solutions from players such as HappyRobot.ai (autonomous operations agents), Baxter Planning (aftermarket planning), West Monroe (supply chain consulting), Pando (TMS* platform), and Leafio.ai (retail planning AI), along with internal AI assets to build an AI-driven, supply chain ecosystem that is automated, predictive, and self-optimizing.

Investments and innovation

- Infosys has deployed multiple production-scale Gen AI and agentic AI use cases primarily in order management, aftermarket services, and commercial operations, focusing on PO automation, virtual SME support, multilingual conversational AI, autonomous sourcing, repair operations, cash flow optimization, and sustainability reporting, delivering 30%–70% effort reduction, 20%–30% cycle time improvement, over 90% accuracy, and 45%–50% productivity gains.
- Over the past year, it enhanced planning capabilities through its B2Wise (demand sensing and integrated planning with SAP) and TADA (end-to-end supply chain visibility) platforms, enabling data-driven inventory, resource planning, order tracking, and fulfillment optimization.

TMS: Transportation management system

Kinaxis: RadarView profile

KINAXIS

AVASANT RADARVIEW™
TECH PIONEER
Supply Chain Operations Business Process Transformation 2026

Leverages its Maestro platform for concurrent, in-memory planning with GPU-based optimization and no-code AI agent creation to support real-time scenario modeling and decision-making across supply networks.

Practice overview

- Practice size: 1,800+
- Active clients: 400+
- Delivery highlights: Offices across APAC, North America, and Europe

17%	$200B+
SaaS revenue growth, 2024–2025	Inventory handled monthly

Case studies

- Transformed supply chain planning for Vizio by implementing Kinaxis Maestro, which enabled visibility, synchronized decision-making, faster scenario analysis, improved responsiveness, and enhanced collaboration.

Sample clients

- Vizio
- Unilever
- Jabil
- Bosch
- Siemens
- GEODIS
- Lockheed Martin

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Key IP and assets

Kinaxis Maestro™: An AI-powered end-to-end supply chain orchestration platform

Key partnerships

accenture, EY, Deloitte., Google Cloud, Microsoft

Analyst insights

- Kinaxis provides supply chain orchestration through its Maestro platform, which integrates strategic, tactical, and operational planning in a single concurrent environment, reducing functional silos; the platform uses a concurrent planning engine and in-memory architecture to enable simultaneous updates across demand, supply, and inventory for real-time visibility and rapid scenario modeling
- Kinaxis integrated NVIDIA GPU-based optimization into its Maestro platform, enabling faster large-scale supply chain planning; it delivers up to 12 times processing improvements, reduces planning cycles from hours to minutes, and supports complex models with millions of variables and multiple scenario runs, allowing real-time analysis and execution within operational time constraints.
- In February 2026, Kinaxis introduced Maestro Agent Studio, a no-code tool to build AI agents within its Maestro platform using existing data and workflows. It integrates with external LLMs such as OpenAI GPT and Google Gemini with governance controls. The agents support both routine and complex decision scenarios by operating within the platform's planning environment.
- It also partnered with ExxonMobil to develop a supply chain planning solution for the oil and gas sector, addressing fragmented systems and reliance on manual processes. It includes planning capabilities for fuels, chemicals, and lubricants, accounting for production and logistics constraints. The approach enables integrated planning from refinery to end customer, along with improved inventory and replenishment visibility. It supports scenario-based planning to manage disruptions in a complex supply chain environment.

Darker color indicates higher value chain coverage through digital services

Manhattan Associates: RadarView profile

Manhattan Associates

AVASANT RADARVIEW™ TECH PIONEER
Supply Chain Operations Business Process Transformation 2026

Practice overview

- Practice size: 4,500+
- Active clients: N/A
- Delivery highlights: 15 offices across APAC, North America, and Europe

30+	8%
Years of experience	Reduced empty miles for a client

Case studies

- Optimized routing and enhanced vehicle utilization for Giant Eagle by implementing its transportation management system. This reduced empty miles by 8% while addressing high operational costs and routing inefficiencies.

Sample clients

- Peloton
- Heineken
- Hallmark
- Lacoste
- Adidas
- Crocs

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Key IP and assets

Manhattan Active®: A unified SaaS platform unifying distribution, labor, automation, and transportation

Key partnerships

Capgemini, Deloitte., accenture, enVista, 4SIGHT Supply Chain Group, Microsoft

Deploys its cloud-native Active platform that embeds autonomous AI agents directly within WMS*, TMS*, and OMS* workflows, enabling seamless multi-agent orchestration and real-time fulfillment optimization across omnichannel operations.

Analyst insights

- Manhattan Associates offers integrated supply chain solutions across demand forecasting, inventory optimization, warehouse and transportation management, and omnichannel fulfillment, enabling coordinated planning and execution. It supports end-to-end processes from demand sensing to delivery and returns, with real-time visibility and workflow automation.
- It has embedded AI agents within the Manhattan Active platform, operating directly across WMS, TMS, and OMS with shared data and workflows. These agents function as autonomous, role-based digital workers that analyze real-time data and execute multistep decisions across planning and execution. They orchestrate workflows, integrate via APIs, and support multiagent collaboration for complex scenarios. This native integration enables real-time decision execution, reducing manual effort and improving operational productivity.
- Its Manhattan Agent Foundry™ solution enables enterprises to build, deploy, and scale autonomous AI agents embedded across supply chain processes, using no-code/low-code and developer-based approaches. It combines Gen AI with deterministic workflows, APIs, and reusable components to automate complex, multistep tasks, supporting agent-to-agent collaboration and interoperability standards.
- In January 2026, it enhanced its Manhattan Active® Omni solution with embedded AI agents, upgraded POS capabilities, and fulfillment optimization tools. The update introduces natural language-driven agents for store, contact center, and OMS tasks, along with a fulfillment simulation engine for scenario-based decision-making to improve efficiency, visibility, and omnichannel retail execution.

Darker color indicates higher value chain coverage through digital services

*WMS – Warehouse management system; TMS – Transportation management system; OMS – Order management system; POS:Point of sale

Oracle: RadarView profile

ORACLE

AVASANT RADARVIEW™
TECH PIONEER
Supply Chain Operations Business Process Transformation 2026

Practice overview

- Practice size: N/A
- Active clients: ~10,000
- Delivery highlights: Presence in 140 countries across the world

591+	25,000+
Enterprises using Oracle SCM* Cloud globally	Certified Oracle customers offering services for TCS

Case studies

- Implemented Oracle Warehouse Management Cloud for Abcdin, which increased logistics productivity by 20%, improved NPS* from 40% to 60%, along with faster order fulfillment, better control, and enhanced responsiveness.

Sample clients

- Abcdin
- FedEx
- Toyota
- Cisco
- Cummins
- Honda
- Michelin

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Key IP and assets

Oracle Fusion Cloud SCM (core platform): A unified suite covering planning, procurement, manufacturing, logistics, and order management

Key partnerships

accenture, tcs TATA CONSULTANCY SERVICES, Infosys, Microsoft

Has embedded AI agents that mark a strategic shift toward semi-autonomous supply chain operations, reducing manual intervention across procurement, logistics, and order management.

Analyst insights

- Oracle's supply chain capabilities are anchored in its Fusion Cloud SCM platform, which integrates planning, procurement, manufacturing, logistics, and order management on a single cloud-native data model. This unified architecture enables real-time data synchronization across functions, reducing latency between planning and execution and allowing enterprises to respond faster to demand and supply disruptions.
- The planning layer includes demand management, supply planning, and sales and operations planning, supported by embedded analytics and AI-driven scenario modeling. These capabilities enable continuous, exception-based planning rather than periodic cycles, helping organizations improve forecast accuracy, align supply–demand decisions, and reduce inventory and service risks.
- It embeds AI agents and generative AI capabilities across supply chain workflows, including planning, inventory, procurement, and logistics. These agents provide contextual recommendations, automate routine decisions, and execute tasks (e.g., exception handling, order prioritization), enabling a shift toward semi-autonomous operations and reducing manual intervention.
- Its supply chain collaboration capability enables enterprises to jointly plan supply, share real-time data, and coordinate execution with suppliers, contract manufacturers, and partners through a unified cloud platform. It supports multitier collaboration via portals, B2B messaging, and APIs, allowing trading partners to exchange forecasts, commitments, and early risk signals.

Darker color indicates higher value chain coverage through digital services

SCM: Standard chain management; NPS: Net promoter score

PwC: RadarView profile

pwc

AVASANT RADARVIEW™ DISRUPTOR Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★★

Investing in agentic operating models through its own AI agent OS and partner-led innovations, signaling a shift toward orchestrated, AI-enabled supply chain operations.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Serves 71 countries across North America, Latin America, EMEA, and APAC

10%	5:1
Reduction in operating expenses	Average ROI from spend under management

Client case studies

- Transformed supply chain operations for a US healthcare system by implementing a unified Workday-enabled solution across procurement, inventory, and back-office functions, following a major merger. Outcomes included 2x faster system adoption, 600 sites deployed across two go-live events, and 2x faster inventory par counting using Kanban functionality, improving inventory accuracy and availability.
- Redesigned the supply chain of a Fortune 500 retailer by implementing a connected, omni-channel operating model enabled by integrated business planning, enhanced inventory visibility, and aligned processes. It helped deliver a 43% increase in revenue, up to a 10% reduction in store and supply chain operating costs, and faster order fulfillment, with delivery timelines reduced to 24 hours.
- Transformed processes for a global manufacturing firm facing limited coordination across planning, procurement, and logistics systems. PwC's agent OS enabled the orchestration of AI agents across SAP, Oracle, and AWS, along with custom risk and disruption-detection agents. It improved cross-functional visibility, enabled proactive decision-making, and reduced supply delays by up to 40%.

Key IP and assets

- Supply Chain Intelligence: A proprietary cloud-based platform for enhanced supply chain visibility and decision-making
- Supply chain track and trace solution: A blockchain-based solution for tracking products
- Digital Brain: A joint platform with o9 Solutions for demand forecasting and planning

Key partnerships

Supply chain platform vendors

BlueYonder, SAP, ORACLE, Anaplan, o9, coupa

Technology partners

salesforce, celonis, aws, Microsoft, ivalua

Sample clients

- A US healthcare system
- A Fortune 500 retailer
- A global manufacturing firm
- A packaging manufacturer
- A biopharma company
- A food distributor
- Boyd Group
- A national consumer goods company
- Halcor

Industry coverage

- Aerospace & defense
- Banking
- Financial services
- Government
- Healthcare & life sciences
- High-tech
- Insurance
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom, media & entertainment
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

PwC: RadarView profile

Analyst insights

Practice maturity ★★★

- PwC helps enterprises design and implement end-to-end connected supply chains, integrating planning, procurement, manufacturing, and logistics into a unified operating model. It emphasizes enterprise-wide process unification and customer-centric outcomes, enabling seamless integration of data and workflows.
- Its Predictable Value approach reflects strong execution maturity, linking strategic supply chain decisions with financial outcomes and operational KPIs. It uses structured frameworks (such as integrated business planning and inventory entitlement planning), enabling clients to quantify value, accelerate implementation, and ensure sustained adoption, rather than limiting impact to advisory-level recommendations.
- Its supply chain offerings are focused on real-time visibility, resilience, and ecosystem connectivity. Through advanced analytics, AI-driven insights, and technologies such as blockchain-based track-and-trace, PwC enables organizations to anticipate disruptions, enhance supplier transparency, and improve agility.
- PwC incorporates sustainability considerations into supply chain processes, including sourcing, production, and logistics. This includes tracking and managing environmental metrics alongside traditional operational KPIs.

Future-proofing ★★★

Domain ecosystem

- PwC leverages its alliance with SAP, combining SAP platforms and technologies such as RISE with SAP with consulting and implementation capabilities. The partnership focuses on improving resilience, visibility, and decision-making through integrated data, AI-driven insights, and real-time planning.
- In October 2025, PwC Japan partnered with Fujitsu to support economic security and regulatory compliance for sovereign cloud adoption in Japan. PwC contributes expertise in cloud security, supply chain regulation, and digital governance while also supporting the implementation of user-side risk controls.
- It partners with actyv.ai to embed financial services into supply chain ecosystems via a fintech platform, improving liquidity and transaction efficiency.

Investments and innovation

- PwC has built its own agent OS platform, a unified system to orchestrate AI agents across enterprise processes such as planning, procurement, and logistics. This enables the automation of cross-functional workflows and integration across systems such as SAP, Oracle, and cloud platforms. It has developed libraries of prebuilt AI agents and reusable workflows, allowing faster deployment of automation across use cases such as disruption detection and demand planning coordination.
- It is actively investing in next-generation operating models through partnerships such as Leah (agentic OS), enabling coordinated AI agents across procurement, finance, and operations. This shows a focus on embedding AI into end-to-end business processes, including supply chain functions.

Sutherland: RadarView profile

SUTHERLAND

AVASANT RADARVIEW™ CHALLENGER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★

Delivers platform-led supply chain operations anchored around its proprietary eSeal platform, providing unit-level traceability, real-time visibility, and control across various functions.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Overall presence in nearly 20 countries worldwide

95% Reduction in warranty losses

98% Decrease in quality control issues

Client case studies

- Transformed the supply chain of a global lubricants manufacturer to address revenue leakage, inventory inefficiencies, and lack of visibility by deploying its eSeal® platform. This led to no dispatch errors, better channel control, 4% more revenue, 3% less inventory obsolescence, 2% working capital gains, and about 90% fewer unauthorized cross-border sales.
- Enabled a global electrical manufacturer to address high false warranty claims, poor traceability, inaccurate demand forecasting, and fragmented visibility by deploying its eSeal platform with real-time validation of sales returns, resulting in 80% reduction in false warranty claims, 75% reduction in quality issues, and a 2%–4% increase in sales alongside cost and WC* optimization.
- Helped an Indian manufacturer of electrical and consumer electronics, address inventory complexity, along with incorrect warranty claims and inefficient picking, by deploying its eSeal platform integrated with SAP. This resulted in a 50%–80% reduction in picking time, elimination of warranty-related revenue leakage, improved inventory accuracy, and faster order fulfillment.

Key IP and assets

- eSeal®: A proprietary platform providing end-to-end visibility, tracking, and control across sourcing, production, warehousing, and logistics networks
- Robility®: A hyperautomation platform to enable automation of supply chain workflows
- Returns management: A solution to deliver end-to-end visibility across the returns lifecycle

Key partnerships

Supply chain platform vendors

ACCRUENT, updapt, Johnson Controls, SUBCON

Technology partners

Microsoft, aws, celonis, ORACLE, servicenow, SAP

Sample clients

- A global lubricants manufacturer
- A global electrical manufacturer
- An Indian manufacturer of electrical & consumer electronics
- A global consumer goods company
- A global manufacturing enterprise
- An oilfield services and technology company
- An American telecom provider
- A global technology company
- A provider of communications and collaboration technology

Industry coverage

- Aerospace & defense
- Banking
- Financial services
- Government
- Healthcare & life sciences
- High-tech
- Insurance
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom, media & entertainment
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

*WC: Working capital

Sutherland: RadarView profile

Analyst insights

Practice maturity ★★★

- Sutherland provides supply chain orchestration through its proprietary eSeal® platform, which unifies sourcing, production, and logistics into a single traceability engine. The platform leverages IoT, passive tagging, and AI-driven telemetry to offer real-time, unit-level visibility across multinode global networks.
- Its digital supply chain solutions cover production, warehouse, logistics, and vendor management processes through integrated tracking of materials, inventory, and shipments, enabling traceability, inventory accuracy, delivery visibility, and supplier monitoring. These capabilities are supported by technologies such as IoT, RFID*, AI/analytics, blockchain, and cloud systems to facilitate real-time data capture and supply chain coordination.
- Its domain expertise across manufacturing, retail, logistics, and consumer industries enables the design of modular, sector-specific solutions aligned to distinct priorities, ranging from traceability to omnichannel fulfillment, driving scalable transformation, regulatory compliance, and measurable business outcomes.
- Sutherland's sustainability-as-a-service offering provides a centralized ESG data management platform that integrates with enterprise systems to replace manual tracking with structured, real-time data processes. It supports end-to-end ESG operations across global frameworks while enabling compliance monitoring.

Future-proofing ★★

Domain ecosystem

- Sutherland partners with technology providers such as Oracle, Microsoft, AWS, and ServiceNow to deliver platform-led, integrated supply chain solutions. These partnerships support capabilities across ERP modernization, logistics, procurement, and workflow orchestration, while hyperscaler collaborations enable scalable, data-driven operations and real-time visibility.
- It partners with SAP to deliver end-to-end ERP transformation, including AI-driven assessments, S/4HANA migration, and cloud ERP implementation. It also leverages SAP platforms along with managed services and security capabilities to support system modernization, process integration, and ongoing operations.

Investments and innovation

- Sutherland is actively investing in agentic AI platforms and domain-trained AI agents to move beyond automation toward self-learning and autonomous operations. These AI agents are designed to orchestrate end-to-end workflows across enterprise functions, a capability directly applicable to processes such as supply chain, procurement, logistics coordination, and exception management.
- It continues to invest in IP-led platforms such as eSeal, which provide end-to-end traceability, asset tracking, and real-time supply chain visibility. These platforms leverage IoT tagging and event-level data capture to create digital supply chain twins, supporting improved inventory accuracy, compliance, and control.

*RFID: Radio frequency identification

TCS: RadarView profile

TATA CONSULTANCY SERVICES

AVASANT RADARVIEW™ LEADER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★★

Future-proofing ★★★★★

Focuses on embedding Gen AI and agentic AI across processes to drive automation and decision intelligence, expanding its partner ecosystem to further strengthen capabilities.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Delivery centers in 25 countries worldwide

2,000+ Certified employees across SCM**

5%–10% Supply chain BPO growth, Dec. 2024–2025

Client case studies

- Transformed supply chain operations for a global telecommunications provider to address fragmentation and enable multichannel fulfillment. It implemented a third-party logistics (3PL) solution using its supply chain transformation toolkit. The solution improved operational efficiency, enhanced customer experience through more accurate fulfillment, and positioned the client to expand its presence in the UK 3PL market.
- Harmonized global supply chain operations for a global industrial manufacturing and advanced materials provider by implementing a SAP-based, multilayer migration program. It helped 20 plants and six warehouses globally, improving inventory control, reducing cycle time, enhancing product quality, and enabling a scalable, standardized supply chain platform for global operations.
- Transformed supply chain planning for a life sciences and diagnostics company by digitizing fragmented, siloed processes and implementing a unified Oracle Planning Cloud–based solution. Outcomes included improvement in on-time delivery to 95%, increase in inventory turns to 0.65, and 20% improvement in forecast accuracy, along with enhanced visibility and greater resilience.

Key IP and assets

- TCS Cognix™: A digital transformation suite with order, freight analytics, sustainability, and logistics modules
- TCS Envirozone™: A sustainability data collection platform
- TCS DigiFleet™: A real-time tracking solution for mobile assets
- TCS Algo Retail™: A supply chain solution for the retail industry
- TCS ignio™: An AI solution for IT and business processes

Key partnerships

Supply chain platform vendors

BlueYonder, Manhattan Associates, resilinc, o9, Kinaxis, SAP, Oracle, coupa

Technology partners

SS&C blueprism, UiPath, Microsoft, Informatica, servicenow, celonis, aws

Sample clients

- A global telecommunications provider
- A global industrial manufacturing and advanced materials provider
- A life sciences and diagnostics company
- A European steel maker
- A global networking tech firm
- A global healthcare and equipment provider
- A global manufacturer of confectionery, pet food, and animal care products

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

*PLOG: Proactive problem log; **SCM: supply chain management

TCS: RadarView profile

Analyst insights

Practice maturity ★★★★★

- TCS delivers end-to-end supply chain services across planning, sourcing and procurement, order management, manufacturing, logistics, and aftermarket. It combines consulting, digital transformation, and managed-services (consult-to-operate) to redesign and run parts of the supply chain with automation, AI, analytics, and its proprietary platforms such as TCS Cognix and TCS ignio.
- It exhibits depth in operational orchestration and control tower-led execution, enabled through command centers that unify ERP, SCM, and partner data for real-time visibility and exception management. The integration of AI, Gen AI, and agentic AI into workflows supports guided decision-making and autonomous execution patterns, transitioning from traditional BPO to intelligent, outcome-driven operations.
- It enhanced its proprietary Cognix™ suite with AI-led capabilities across key supply chain functions, including freight optimization, demand forecasting, and inventory planning. It has also strengthened order management through command centers and autonomous sales order capabilities, enabling end-to-end life cycle visibility and automation.

Future-proofing ★★★★★

Domain ecosystem

- Over the last year, TCS expanded its partner ecosystem through new collaborations with Anaplan for AI-driven planning and analytics, and Pando for freight audit, transport optimization, and logistics control tower capabilities. In April 2025, it also partnered with Google Cloud to drive AI-led transformation in the retail sector, leveraging Gen AI and advanced analytics to enhance supply chain visibility, warehouse operations, and customer experience.
- In Feb 2026, it partnered with ServiceNow to scale enterprise AI adoption across functions such as supply chain, procurement, and finance. It focuses on embedding AI and agentic capabilities into enterprise workflows to enable automation, real-time decision-making, and process optimization.

Investments and innovation

- In 2025, TCS enhanced its supply chain capabilities through investments in digital and AI-led solutions, strengthening planning and forecasting with Gen AI-driven modeling, upgrading transportation and logistics capabilities through optimization dashboards.
- It also invested in talent development through programs such as the Academic Interface Program and role-based training, covering key supply chain functions. It invested in building senior subject matter expert and leadership capabilities through internal training and expert guidance to enhance advisory-led delivery. Additionally, its Contextual Masters program develops deep client and domain expertise, with over 2,000 certified professionals.

Tech Mahindra: RadarView profile

Tech Mahindra

AVASANT RADARVIEW™ INNOVATOR Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★

Future-proofing ★★★

Focuses investments on scaling reusable, AI-enabled platforms (such as agentic AI and control towers) to drive visibility, automation, and decision intelligence.

Practice overview

- Practice size: 2,600+
- Active clients: 30+
- Delivery highlights: 10+ delivery centers worldwide

100+ Digital FTEs	5%–10% Supply chain BPO growth, Dec. 2024–2025

Client case studies

- Transformed e-commerce operations for a customs department in the Middle East enabling visibility and eliminating physical documentation for bonded zone imports by conducting design thinking workshops with the client and ecosystem partners. This resulted in 20% reduction in operational costs, 100% supply chain visibility, and a 23% increase in e-commerce transactions.
- Helped a telecom company in North America by addressing retail shrinkage, high operational costs, poor inventory visibility, and asset traceability by conducting benchmarking and implemented a Retail Inventory Serialization Platform. This saved over $100M from reduced inventory days, reduced TCO by 50%, and enhanced customer experience across 6,000 stores.
- Improved inventory forecasting and classification for a global automotive company by analyzing datasets including demand patterns, costs, lead times, and order frequency, followed by data cleansing and reclassification, and developed ML-based forecasting models. This resulted in 90% forecast accuracy, 8% improvement in inventory turns, and 5%+ increase in customer satisfaction.

Key IP and assets

- AftEAZE: A BPaaS solution for aftermarket services
- Yantr.ai: An AI/ML-based field services tool
- iDecision: A supply chain management analytics tool
- SeeR: A data and reporting tool
- UNO: A proprietary automation tool for tech implementation and support
- Orion: An agentic AI marketplace for AI agents across supply chain processes

Key partnerships

Supply chain platform vendors

BlueYonder, e2open, syncron, One Network Enterprises, fluentcommerce (order management. accelerated.), TADA NOW

Technology partners

Automation Anywhere, UiPath, celonis, SIGNAVIO

Sample clients

- A customs department in the Middle East
- A telecom company in North America
- A global automotive company
- International Motors
- GSK
- Dubai International Airport
- A European aerospace original equipment manufacturer
- A European cement manufacturer
- A Japanese food product company

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

AVASANT

Tech Mahindra: RadarView profile

Analyst insights

Practice maturity ★★★★

- Tech Mahindra offers end-to-end coverage across the supply chain operations value chain, with each area supported by a mix of in-house capabilities and partnerships with platforms such as Blue Yonder, SAP, and PTC, establishing deep operational breadth across plan, source, make, deliver, and return functions.
- It has built a robust proprietary asset ecosystem, including platforms such as Yantr.ai (field service optimization), AftEAZE (aftermarket BPaaS), Orion (agentic AI marketplace), and tools such as iDecision (analytics) and SeeR (visibility dashboards). These assets support predictive analytics, automation, orchestration, and end-to-end visibility, thereby enabling investment in reusable IP to drive transformation outcomes.
- TechM's process optimization maturity is underpinned by structured frameworks, addressing client challenges such as data silos, technical debt, and change management. It applies data governance, API-led integrations, hypercare transition, and change management frameworks to mitigate risk and drive success.
- It demonstrates digital transformation and consulting capabilities, including design thinking-based engagements, benchmarking frameworks (e.g., Needle Analysis), and implementation of control towers, digital threads, and AI-driven forecasting models, supporting transformation beyond transactional outsourcing.

Future-proofing ★★★

Domain ecosystem

- Tech Mahindra is expanding its partner ecosystem to support AI-led transformation by investing in partnerships with platforms such as Pipefy, Enate, Horizonsolution.ai, and Lyric.tech. These collaborations are aligned with its focus on agentic AI, workflow orchestration, and digital supply chain innovation, indicating a forward-looking ecosystem strategy.
- In March 2026, it partnered with ParkourSC to deliver AI-enabled supply chain solutions that improve visibility and support faster decision-making across operations, particularly in pharma and cold chain logistics by combining TechM's implementation capabilities with ParkourSC's decision intelligence platform.

Investments and innovation

- Tech Mahindra is enhancing its proprietary platforms, including the evolution of Yantr.ai into an end-to-end supply chain optimization and orchestration platform, and the development of agentic AI capabilities through the Orion platform. These investments strengthen reusable, platform-led transformation capabilities.
- In 2025, it expanded its logistics ecosystem through collaboration with Arviem and Shipsy, combining IoT-enabled cargo monitoring, asset tracking, and advanced analytics with AI-native logistics orchestration capabilities. It helps strengthen supply chain visibility, enhance risk management and sustainability outcomes, and improve operational agility and decision-making, particularly in complex global logistics networks and high-growth e-commerce environments.

AVASANT

UST: RadarView profile

AVASANT RADARVIEW™ CHALLENGER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★

Future-proofing ★★

Has a strong footprint in retail, specifically strengthening capabilities in warehouse management, transportation management, and omnichannel commerce.

Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: Overall presence in nearly 30 countries worldwide

700B+ Data records managed for a client

91% Full set-through rate

Client case studies

- Implemented the UST IQ platform for a global retailer facing slow query processing and fragmented data to unify data and enable high-speed analytics. This provided real-time insights and improved decision-making across supply chain functions. As a result, the client achieved sub-second query speeds across 700 billion records, a 50% reduction in total cost of ownership, and improved forecasting.
- Deployed its UST Omni platform with control tower capabilities and predictive analytics for a retailer in Western Europe that struggled with long lead times, poor visibility, and inefficient demand-supply alignment. The solution improved coordination across sourcing, production, and distribution, achieving a 30% reduction in lead time, a 32% reduction in cash conversion cycle, and 91% sell-through rate.
- Helped a US-based biopharmaceutical CDMO embed on-site consultants to assess gaps and implement targeted improvements across procurement, warehousing, and materials management. This improved scalability and control, enabled the client to achieve over 50 process improvements and $1.5M in annual savings, reduced inventory waste, improved supply continuity, and enhanced productivity.

Key IP and assets

- UST Omni™: An integrated global visibility and execution platform
- UST Flex iOM: An order management solution to complement the SAP digital core
- UST Optum: A supply chain optimization-as-a-service offering
- UST IQ: A Gen AI platform to automate software development
- UST SmartOps: A Gen AI-powered intelligent process automation platform for supply chain

Key partnerships

Supply chain platform vendors

BlueYonder, o9, SAP, bricz

Technology partners

ThinkIQ, GRAVITY, GreyOrange

Sample clients

- A global retailer
- A retailer in Western Europe
- A US-based biopharmaceutical CDMO
- A US-based multinational IT consulting firm
- A US-based automation solution provider

Industry coverage

- Aerospace & defense
- Banking
- Financial services
- Government
- Healthcare & life sciences
- High-tech
- Insurance
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom, media & entertainment
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

CDMO: Contract Development and Manufacturing Organization

UST: RadarView profile

Analyst insights

Practice maturity ★★★

- UST provides supply chain transformation through its proprietary UST Omni platform to integrate suppliers, distributors, and logistics providers into a single, unified network, offering features such as demand sensing, automated purchase order management, and SKU-level inbound shipment tracking.
- It specializes in Blue Yonder planning solutions, including Luminate Assortment and allocation. Their team, composed of former Blue Yonder associates, provides strategic consulting and managed services to optimize ROI on these third-party platforms. Additionally, UST offers the Flex iOM solution to enhance SAP digital core environments, providing a "single user cockpit" for real-time inventory allocation.
- UST integrates ESG criteria directly into supply chain operations through advisory services and digital tools such as UST EcoWoven, which integrates AI, data, and analytics to provide real-time visibility into sustainability metrics such as carbon emissions and resource usage.
- It exhibits large-scale supply chain data environments through platforms such as UST IQ, which support high-volume, low-latency analytics. Capabilities such as sub-second query processing and precomputed analytics models enable near real-time insights, improving forecasting accuracy and inventory optimization.

Future-proofing ★★

Domain ecosystem

- UST has partnerships with various supply chain and technology vendors such as o9 Solutions, Blue Yonder, ThinkIQ, Gravity Supply Chain, GreyOrange, and Bricz to deliver capabilities across planning, visibility, execution, and warehouse automation, enabling end-to-end, platform-led supply chain transformation.
- It partners with o9 and Blue Yonder to deliver advanced demand planning, supply chain orchestration, and AI-driven decision-making. Collaborations with ThinkIQ and Gravity enable enhanced traceability, process optimization, and multi-tier supply chain visibility through integrated, single-platform solutions. It partners with GreyOrange to integrate AI-driven robotics, autonomous material handling, and intelligent warehouse orchestration into client operations.

Investments and innovation

- UST made strategic investments in Bricz to strengthen its retail and fulfillment capabilities. This enhances its domain-led consulting and execution across fulfillment network design, warehouse optimization, and omnichannel operations, enabling it to deliver more integrated, end-to-end retail supply chain transformations with improved last-mile efficiency and customer experience.
- In June 2024, UST acquired Endeavor Consulting Group, a life sciences specialist, to bolster its pharmaceutical and medical device supply chain capabilities. Integrating Endeavor's SAP expertise with UST's platforms, it targets product commercialization and supply chain management for highly regulated industries.

Wipro: RadarView profile

AVASANT RADARVIEW™ LEADER Supply Chain Operations Business Process Transformation 2026

Practice maturity ★★★★

Future-proofing ★★★★★

Has expanded investments and ecosystem to include the Mindsprint acquisition, Olam Group engagement. Has continued to scale AI platforms and partnerships for AI-enabled transformations.

Practice overview

- Practice size: 7,800
- Active clients: 40+
- Delivery highlights: Operations in 30 countries worldwide

9,500+ Trained SAP FTEs since 2007	<5% Supply chain BPO growth, Dec. 2024–2025

Client case studies

- Transformed operations for an American telecommunications provider by deploying Agentic AI–powered Wipro Intelligence™, improving order cycle time and test and turn up performance by addressing operational bottlenecks across order issuance, testing, and activation. This resulted in 38% reduction in cycle time, 98.4% test and turn up success rate, and $127M in revenue realization.
- Streamlined service operations by establishing a helpdesk model for a European multinational oil and gas company that was facing low automation and limited visibility. It helped improve process tracking and operational control, resulting in a $7M reduction in financial impact, 100% invoicing accuracy, and 25% productivity improvement through better resource utilization and streamlined operations.
- Enhanced supply chain visibility and execution by deploying regional process excellence dashboards and enabling 24x7 monitoring support for an American multinational technology company that faced limited system connectivity, manual analysis, and rework issues. This resulted in $6.66M cost avoidance, 75% effort reduction, 99.5% accuracy, and 100% shipment processing within eight hours.

Key IP and assets

- Zero Touch Order Management: An automated order management workflow solution
- FALCON: A platform to manage equipment procurement and life cycle with blockchain-based digital passports
- Wipro Intelligence: An agentic AI–driven supply chain intelligence enabling real-time decisions
- Wipro Innovation Network (WIN): An innovation ecosystem that drives client-centric co-innovation

Key partnerships

Supply chain platform vendors

Manhattan Associates, Anaplan, o9, BlueYonder, Esker, infor, SAP, Oracle, Kinaxis, Skan AI, e2open, incorta

Technology partners

Automation Anywhere, Microsoft, salesforce, servicenow, celonis, aws, Google

Sample clients

- An American telecommunications provider
- A European multinational oil and gas company
- An American multinational technology company
- An American capital equipment and semiconductor company
- A global semiconductor company
- An American digital freight brokerage & logistics company
- A UK-based telecommunication network provider
- A global network equipment provider

Industry coverage

- Aerospace & defense
- Government
- Healthcare & life sciences
- High-tech
- Manufacturing
- Nonprofits
- Retail & CPG
- Telecom
- Travel & transportation
- Utilities & resources

Darker color indicates higher value chain coverage

SOPs: Standard operating procedures; NPS: Net promoter score; WIP: Work in progress

Wipro: RadarView profile

Analyst insights

Practice maturity ★★★★

- Wipro's supply chain offerings cover planning, procurement, manufacturing, logistics, and after-sales operations, delivered through a mix of consulting, IT systems integration, and business process services. It offers consulting-led transformation integrated with run operations, addressing challenges such as fragmented accountability and ERP-driven transformation. The approach is structured around end-to-end ownership across strategy, execution, and optimization.
- Its proprietary solution, NOVA (Next-gen Order Visibility & Agentic Automation), supports order management through a combination of in-house capabilities and partnerships with SAP, Oracle, and Salesforce. It enables zero- and low-touch order-to-invoice workflows using digital agents, along with real-time ATP* validation. It also includes agentic order management that identifies disruptions, manages exceptions, and triggers corrective actions with human oversight where required.
- Over the last year, it developed an integrated ecosystem of AI platforms, data layers, and innovation networks to strengthen supply chain transformation. Wipro Intelligence™ enables AI-driven, autonomous decision-making across end-to-end operations, while its SC-IDIA* solution enhances data integration, visibility, and execution. This is further supported by the Wipro Innovation Network (WIN), which drives co-innovation and scaling of AI-led solutions.

Future-proofing ★★★★★

Domain ecosystem

- Wipro leverages a broad partner ecosystem spanning ERP and supply chain platforms such as SAP, Oracle, Kinaxis, Blue Yonder, o9, Anaplan.
- In August 2025, it expanded its AI innovation investments through partnership with Google Cloud, developing 200 production-ready agentic AI solutions and advancing next-gen multiagent systems using platforms such as Google Agentspace for autonomous decision-making and cross-industry transformation.
- In July 2025, it also expanded into industry-specific ecosystem with partnerships such as Cropin, combining agri-intelligence platforms with Wipro's consulting and technology capabilities to enable AI-driven supply chain transformation, traceability, and resilience in agri-food and adjacent industries.

Investments and innovation

- In April 2026, Wipro signed an eight-year strategic transformation deal exceeding $1B with Olam Group, alongside the $375M acquisition of Mindsprint, positioning itself in agri-food supply chains with a consulting-led, AI-powered transformation model. In January 2026, it also introduced a new operating model, reinforcing its shift toward AI-embedded, consulting-led engagements that combine strategy, execution, and platform-driven transformation at scale.
- In March 2026, Wipro strengthened its global innovation footprint by launching an innovation lab in Seoul as part of WIN, focused on AI-led use cases such as smart manufacturing, product engineering, and supply chain optimization, along with investment in local talent and ecosystem partnerships.

SC-IDIA: Supply Chain Intelligent Data Interaction & Automation; ATP: Available-to-promise

Appendix:

RadarView overview

The *Supply Chain Operations Business Process Transformation 2026 RadarView™* assesses service providers across the following dimensions

Practice maturity	• This dimension considers the current state of a provider's supply chain outsourcing practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement. • The crucial aspects in this dimension are the width and depth of the client base, usage of proprietary/outsourced tools and platforms, and quality of talent and execution capabilities.
Future-proofing	This dimension evaluates how the provider is preparing for the future by combining initiatives across the domain/partner ecosystem and investments and innovations defined below: • *Domain/partner ecosystem:* This dimension assesses the nature of the ecosystem partnerships of the provider, the objectives of the partnerships (codevelopment and co-innovation), and engagement with solutions providers, startup communities, and industry associations. Vital aspects in this dimension are joint development programs around offerings, go-to-market approaches, and the overall depth of partnerships. • *Investment and innovation:* This dimension measures the strategic direction of the provider's investments and resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry. The critical aspects of this dimension include both organic and inorganic investments toward capability and offering growth, technology development, and human capital development, along with innovative solutions developed with strategic partners.

Note: As innovation has become a critical provider selection criteria for enterprises, we have also included an "Innovation Index" in the RadarView representation. This index is derived from the provider's investments in IP, technology partnerships, domain partnerships, service and model changes, and training and development. It also incorporates market feedback about the provider's innovative approaches during engagements.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures	Publicly available information from sources such as Securities and Exchange Commission filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing service provider selection and engagement
Provider inputs	Inputs collected through an online survey and structured briefings in January–April 2025

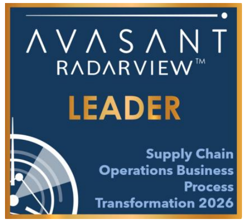
Of the 42 supply chain operations service providers assessed, the following are the final 21 featured in the RadarView for 2026:

accenture, arvato, BlueYonder, Capgemini, cognizant, EXL, EY, genpact, GEP, HCLTech, IBM, Infosys, Kinaxis, Manhattan Associates, ORACLE, TATA CONSULTANCY SERVICES, SUTHERLAND, pwc, Tech Mahindra, UST, wipro

Note: Assessments for Arvato, BlueYonder, Capgemini, Cognizant, EY, GEP, IBM, Kinaxis, Manhattan Associates, Oracle, Sutherland, PwC, and UST were conducted solely based on public disclosures and market interactions.

Reading the RadarView

Avasant has recognized service providers in five classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity and future proofing) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.

Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves through superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.

Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of focus.

Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

Tech Pioneers are tech-first providers reshaping services through technologies, ecosystem orchestration, and long-term bets. These providers demonstrate strong future-proofing capabilities, marked by significant investments in next-generation technologies, differentiated IP, and deep innovation pipelines. Tech Pioneers exert influence through their ability to shape customer road maps, catalyze new service models, and accelerate market transitions. While their service delivery maturity may still be evolving, their impact lies in their role as catalysts, introducing new paradigms, enabling rapid experimentation, and driving early adoption of transformative capabilities.

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