Supply Chain Management (SCM) – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Procurement Outsourcing (PO)

Market Report – March 2017

SCM PEAK Matrix 2017 – summary

Everest Group classified 11 SCM service providers on the Everest Group **P**erformance | **E**xperience | **A**bility | **K**nowledge (PEAK) Matrix into the three categories of Leaders, Major Contenders, and Aspirants. The PEAK Matrix is a framework to assess the relative market success and overall capability of service providers

- **Leaders:** Accenture, Genpact, and TCS
- **Major Contenders:** Capgemini, GEP, HCL, Infosys, OnProcess, and WNS
- **Aspirants:** EXL and Wipro

Everest Group
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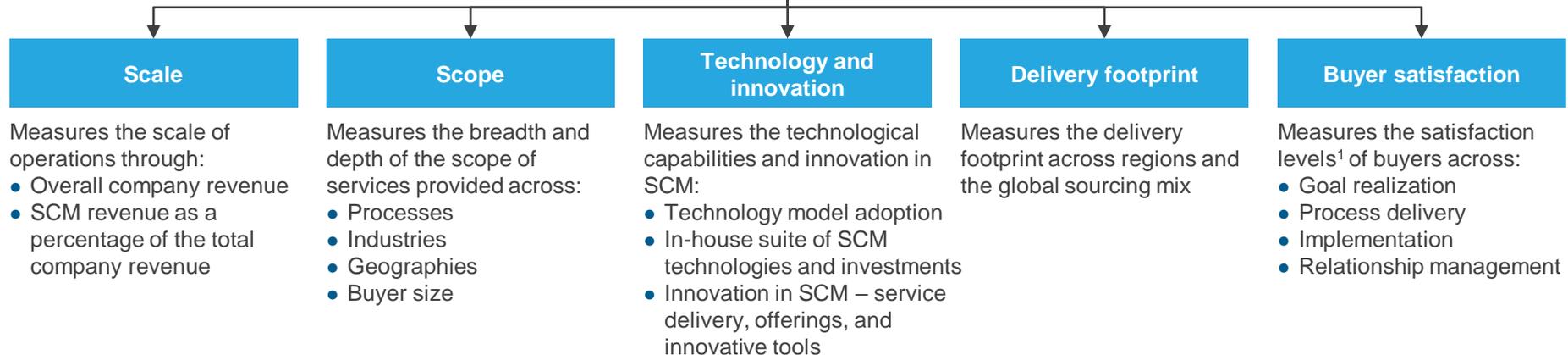# Service providers are positioned on the Everest Group PEAK Matrix based on the evaluation of two key dimensions

Measures success, which is captured through SCM revenue, number of current SCM clients, and YoY revenue growth

Market success

Leaders

Major Contenders

Aspirants
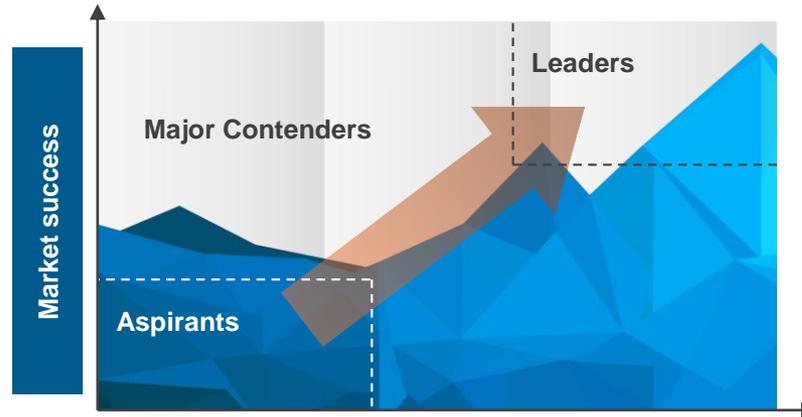
Delivery capability

Measures ability to deliver services successfully. Captured through five subdimensions

| **Scale**	**Scope**	**Technology and innovation**	**Delivery footprint**	**Buyer satisfaction**
Measures the scale of operations through: ● Overall company revenue ● SCM revenue as a percentage of the total company revenue	Measures the breadth and depth of the scope of services provided across: ● Processes ● Industries ● Geographies ● Buyer size	Measures the technological capabilities and innovation in SCM: ● Technology model adoption ● In-house suite of SCM technologies and investments ● Innovation in SCM – service delivery, offerings, and innovative tools	Measures the delivery footprint across regions and the global sourcing mix	Measures the satisfaction levels[1] of buyers across: ● Goal realization ● Process delivery ● Implementation ● Relationship management

1   Measured through the responses from two/three referenced buyers for each service provider

Source: Everest Group (2017)

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Everest Group PEAK Matrix – 2017 SCM market standing

Everest Group PEAK Matrix™ for SCM[1,2]
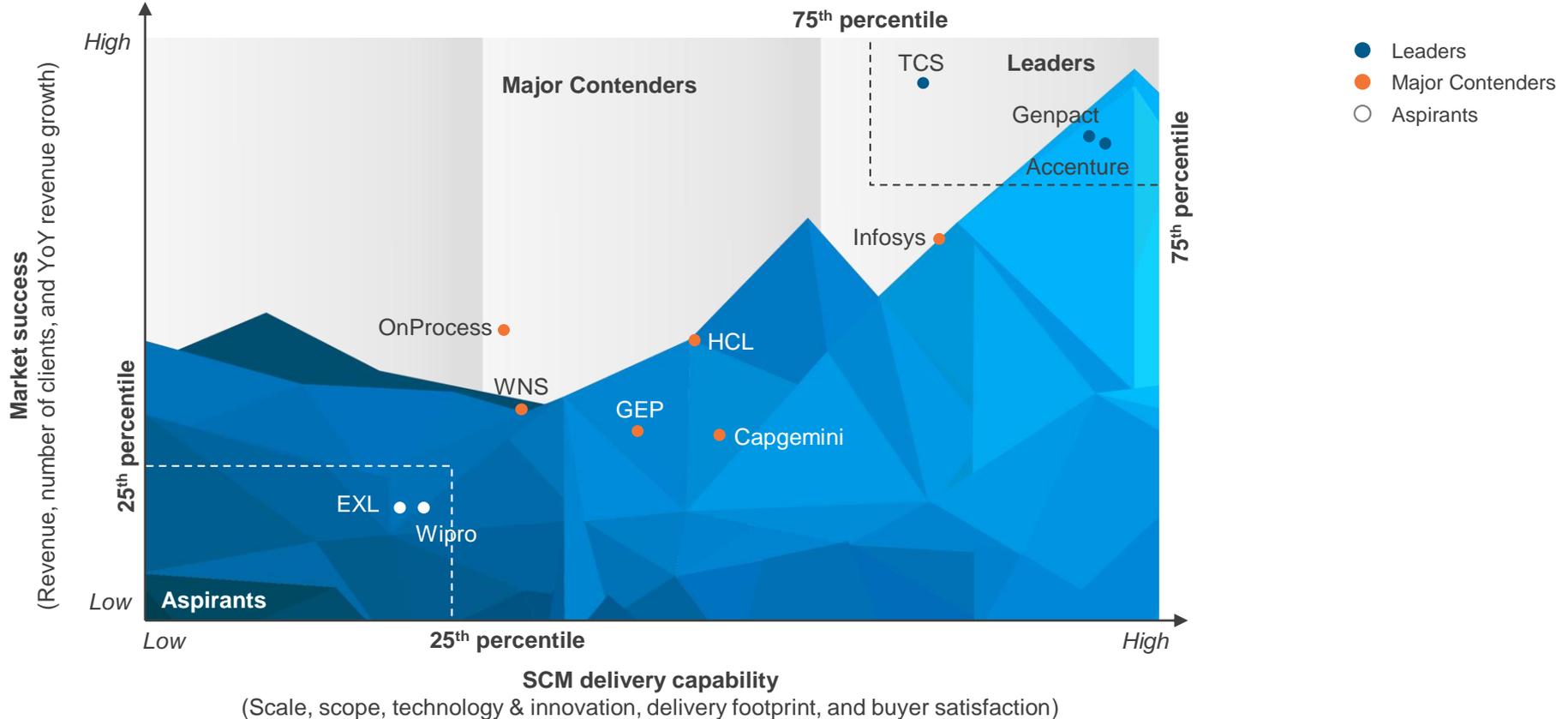
1 Assessment for Wipro excludes complete service provider inputs on this particular study and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of Wipro's public disclosures, and interaction with buyers
2 Service providers scored using Everest Group's proprietary scoring methodology described on page 17

Assessment of service providers' SCM market success and delivery capabilities[1]
Leaders

Measure of capability: ● Best-in-class ◑ Very high ◑ High ◑ Medium high ◑ Medium ◔ Medium low ◔ Low ○ Not matured

Service provider	Delivery capability[1]						Market success[1]
	Scale	Scope	Technology & innovation	Delivery footprint	Buyer satisfaction[2]	Overall	
Accenture	Medium	High	High	Best-in-class	High	Very high	Best-in-class
Genpact	Medium	High	Medium high	Best-in-class	High	Very high	Best-in-class
TCS	High	High	Medium high	Medium low	High	High	Best-in-class

1 Service providers scored using Everest Group's proprietary scoring methodology described on page 17
2 Buyer satisfaction score and overall PEAK Matrix positioning adversely impacted for those service providers who provided inadequate number of buyer references
Source: Everest Group (2017)

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Genpact
Everest Group assessment

Measure of capability: ● Best-in-class ◔ Not matured   ▢ Leaders   ▢ Major Contenders   ▢ Aspirants

Delivery capability[1]							Market success[1]
Scale	Scope	Technology and innovation	Delivery footprint	Buyer satisfaction	Overall		
◔	◔	◔	●	◔	◔		●

Strengths

- Genpact is one of the leading SCM players in the market with several marquee client logos
- It has robust capabilities in lead & quote management, order management & fulfillment, logistics & inventory management, and master data management
- It has invested heavily to build capabilities (both domain and technology) through in-house development, partnerships, and acquisitions
  - In 2015, it launched a new Business Process-as-a-Service (BPaaS) platform and an Order Management-as-a-Service (OMaaS) platform, in partnership with a cloud-based service provider OmPrompt
  - In partnership with Decisyonm, it also launched managed services for supply chains and asset-intensive industries through its Decisyon 360 Internet of Everything (IoE) platform
- Genpact has focused on a Lean Digital approach that combines digital technologies, design thinking, and Lean management principles. This has resulted in a strong uptick in strategy and design engagements

Areas of improvement

- Genpact can increase focus on the after sales market, a market that is expected to have high future growth potential, and also an area in which several of its competitors have made significant investments
- It has an offshore-heavy model, which is not preferred by some clients, especially those with a complex supply chain. Genpact could focus on strengthening its onshore capabilities
- It can look to invest and develop some robust SCM specific tools. Some of the clients have highlighted lack of access to better technology solutions as one of Genpact's key area of improvement

1. Based on contractual and operational information as of June 2016
Source: Everest Group (2017)

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