

The HFS logo is displayed in white, bold, sans-serif capital letters within a solid blue square in the top-left corner of the page.

HORIZONS REPORT

Supply Chain Services, 2024

Analysis of the leading service providers in enterprise supply chain innovation

Authors:

Ashish Chaturvedi, Practice Leader
Saurabh Gupta, President, Research and Advisory Services
Krupa KS, Senior Analyst

Excerpt for Capgemini

“

In today's rapidly evolving marketplace, transforming supply chains into more resilient, efficient, and sustainable networks is not just a competitive advantage but a business imperative. Organizations are leveraging advanced technologies such as advanced analytics, cloud, and artificial intelligence to simplify supply chain architectures, gain visibility, and become more responsive and adaptable to external market events. This shift toward deeper digital integration is a step forward in moving from linear human-dependent supply chains to low-human-touch collaborative supply networks.

”



Ashish Chaturvedi
Practice Leader, HFS

Contents

	Page
<u>SECTION 01</u>	
Introduction and the HFS supply chain services value chain	4
<u>SECTION 02</u>	
Research methodology	9
<u>SECTION 03</u>	
Executive summary and supply chain services market dynamics	13
<u>SECTION 04</u>	
Horizons results: Supply chain services, 2024	29
<u>SECTION 05</u>	
Capgemini profile: Supply chain services, 2024	32
<u>SECTION 06</u>	
HFS Research authors	34

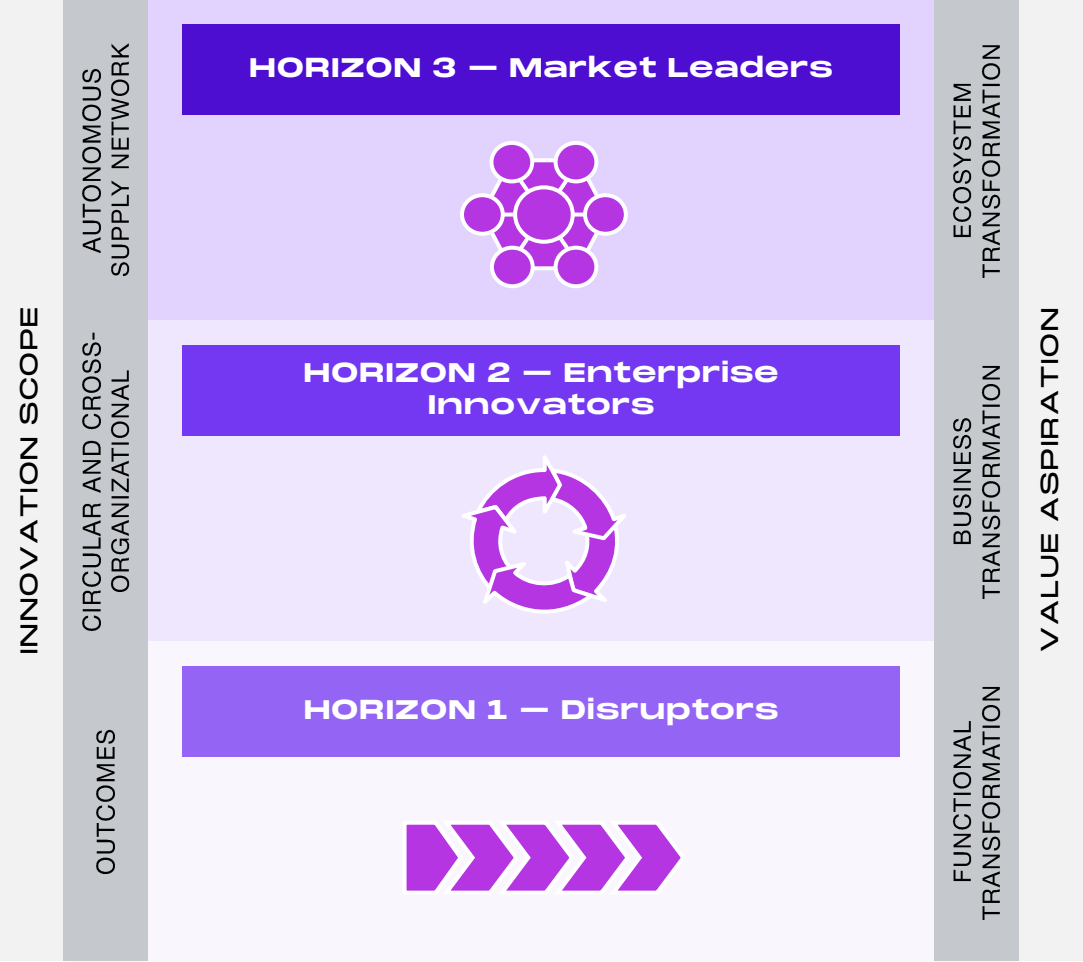
1

Introduction and the HFS supply chain services value chain

Introduction

- The core transformation in supply chains, revolves around the integration of advanced digital technologies, with a significant emphasis on E2E integration and customization to meet specific client needs. This transformation is primarily driven by the adoption of digital solutions such as generative AI, IoT, and advanced analytics, which enhance decision-making, improve operational efficiency, and foster real-time responsiveness. Companies are increasingly focusing on sustainability, integrating green practices such as carbon footprint reduction, ethical sourcing, and compliance with global environmental standards. This holistic approach not only aims to optimize supply chain operations but also align them more closely with the broader business goal of formulating autonomous and networked supply chains.
- *HFS Horizons: Supply Chain Services, 2024* assesses how well service providers are helping their **clients embrace innovation** and **realize value**. The study evaluates providers' capabilities across the HFS definition of the supply chain, based on a range of dimensions to understand the **Why, What, How,** and **So What** of their service offerings.
 - **Horizon 1:** Ability to drive functional optimization outcomes within the supply chain services industry through cost reduction, speed, and efficiency.
 - **Horizon 2:** Horizon 1 + the enablement of the **OneOffice™ model** of end-to-end organizational alignment across the front, middle, and back offices to drive unmatched stakeholder experience.
 - **Horizon 3:** Horizon 2 + the ability to drive **OneEcosystem™ synergy** via collaboration across multiple organizations with common objectives around driving entirely new sources of value.
- This research highlights the **value-based positioning** for each participant across the three distinct Horizons. It also includes **detailed profiles** of each service provider, outlining their **provider facts, strengths, and development opportunities**.
- **Inclusion criteria:** We invited diversified providers of business process services with established business lines focused on supporting enterprise needs for supply chain services to participate in this study. Participation guidelines:
 - Annual supply chain services revenues (combined) of at least \$250 million or a 10% contribution to overall revenue
 - An existing portfolio of services spanning our supply chain services value chain

HFS Horizons: Supply Chain Services, 2024 — Aligning enterprise objectives with service provider value



Horizon 3—modern supply network

Service providers demonstrate Horizon 2 capabilities, plus

- Networked, autonomous, and collaborative vision of supply chain “systems” driving new value
- Supply chain consulting, technology, and managed services at scale
- Ability to influence systemic change across the global sustainability context
- Robust ecosystem of strategic and delivery partners integrated into offerings
- Market-leading investments with differentiated IP, frameworks, and technology
- Driving co-creation with both the client and partner ecosystem
- Perceived as a thought leader with purpose-led relationships

Horizon 2—circular and cross-organizational

Service providers demonstrate Horizon 1 capabilities, plus

- Driving circular supply chains with strong sustainability narrative
- Ability to transform and support clients across end-to-end supply chains
- Bringing together all the capabilities of the provider and client organizations
- Referenceable and satisfied clients for ability to innovate and execute
- Strategic clients and ecosystem partners with output and outcome-driven relationships
- The aim is to improve stakeholder experience throughout the supply chain

Horizon 1—optimization and outcomes

Service providers demonstrate

- Can drive functional digital transformation via cost reduction, speed, and efficiency
- Established supply chain practice; client and partner-backed technical capability
- Clearly defined go-to-market strategy and value proposition
- Emerging sustainability narrative
- Emerging ecosystem of partners
- Primarily a vendor-client relationship with mainly effort and project-based engagements

Key focus areas



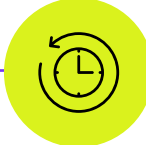
1

How are you helping clients formulate a roadmap to low-touch collaborative supply networks?



2

How are you building resilient supply chains and embedding sustainability?



3

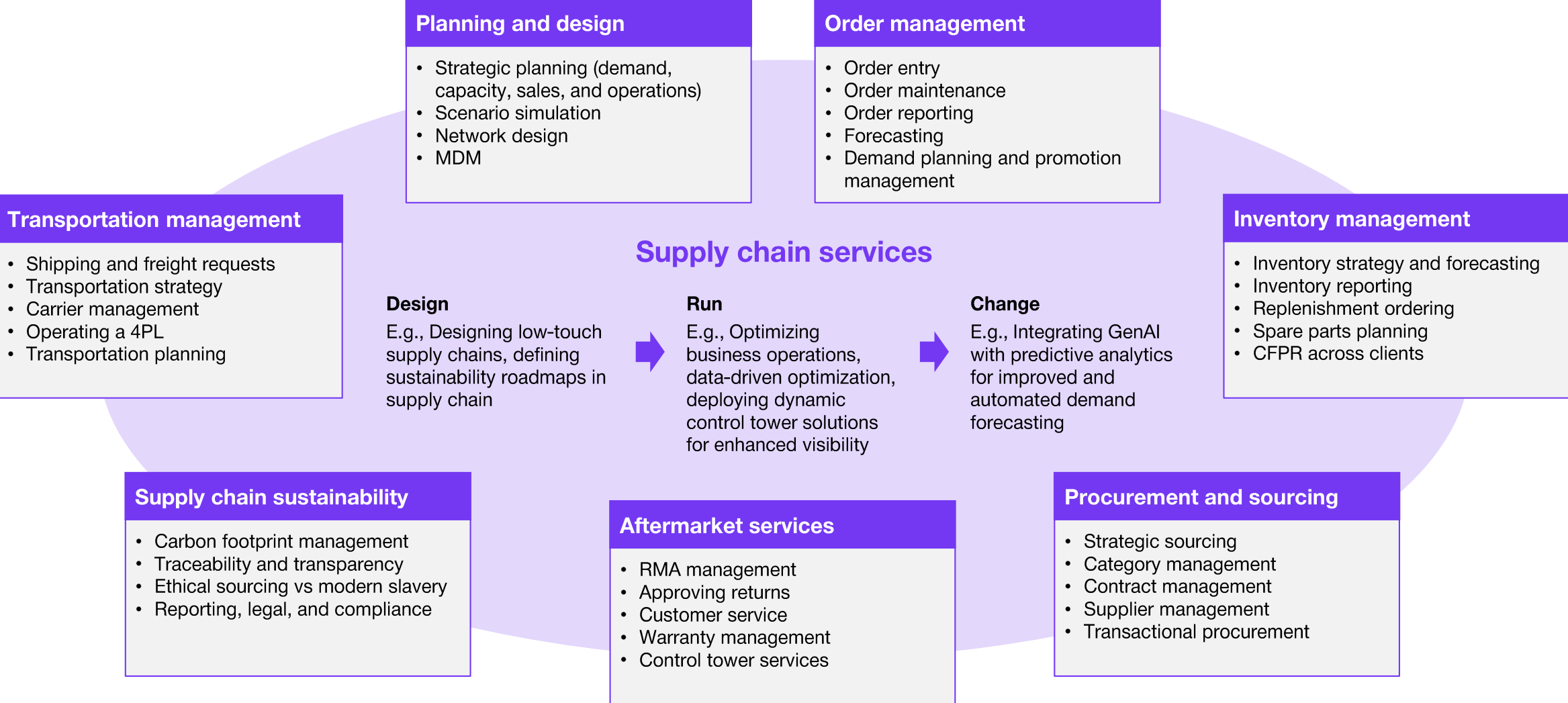
How are you ensuring end-to-end visibility along with reduced lead times?



4

How are you leveraging tech such as GenAI across key functions including demand forecasting, predictive maintenance?

HFS view of supply chain services: a network, no longer a linear value chain



2

Research methodology

Service providers covered in this report



BRISTLECONE



Deloitte.



HCLTech



WNS

Note: All service providers are listed alphabetically

Sources of data

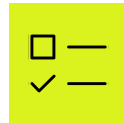
This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on service capabilities of the participating organizations covered in our study. Sources are as follows:



Briefings and information gathering

HFS conducted detailed **briefings** with customer experience leadership from each vendor.

Each participant submitted a specific set of **supporting information** aligned to the assessment methodology.



Reference checks

We conducted reference checks with **29 active clients and 34 active partners** of the study participants via survey-based and telephone interviews.



HFS Pulse

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh-from-the-field HFS Pulse study data featuring **15 service provider ratings from CX decision-makers at enterprises.**



Other data sources

Public information such as news releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Horizons assessment methodology — Supply Chain Services

The “**HFS Horizons — Supply Chain Services**” research evaluates the capabilities of service providers across a range of dimensions to understand the **Why, What, How, and So What** of their service offerings supporting **supply chains**. Our assessment will be based on inputs from clients and partners, augmented with analyst perspectives. The following illustrates how we will assess your capabilities:

← Distinguishing provider characteristics →

Assessment dimension (weightage)	Description	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The Why? (25%)	<ul style="list-style-type: none"> Strategy and vision for supply chain and supply chain services Supply chain offerings aligned to top problem statements for the sector Competitive differentiators 	<ul style="list-style-type: none"> Ability to drive Functional Digital transformation by driving cost reduction, speed, and efficiency 	<ul style="list-style-type: none"> Horizon 1 + driving circular supply chains with strong sustainability narrative and the ability to transform end-to-end supply chain creating unmatched stakeholder experience with a “OneOffice” mindset 	<ul style="list-style-type: none"> Horizon 2 + Low-touch and collaborative vision of supply chain driving completely new sources of value with a “OneEcosystem” approach
Execution and innovation capabilities: The What? (25%)	<ul style="list-style-type: none"> Breadth and depth of services across the end-to-end supply chain New and differentiated offerings Sustainability strategy, narrative, ambition, and % engagements involving sustainability goals/outcomes Strength of supply chain services ecosystem (depth and breadth of supply chain-oriented partnerships) Strength of talent pool (delivery centers, experience, certifications, training program) Supply chain technology innovation (use cases and level adoption of emerging technology) Intellectual property and proprietary frameworks 	<ul style="list-style-type: none"> Strong areas of excellence within the supply chain Primarily focused on either technology services or business services Emerging sustainability narrative Offshore-focused with strong technical skills and supply chain Emerging ecosystem of partners Adequate coverage across the supply chain 	<ul style="list-style-type: none"> Horizon 1 + Ability to support clients on their end-to-end supply chain transformation journey Well-defined sustainability offering Global delivery presence Well-rounded capabilities across all value creation levers: talent, domain, technology, data, sustainability, and change management Supply chain-specific partnerships 	<ul style="list-style-type: none"> Horizon 2+ Supply chain strategy and execution capabilities at scale IT and business services capabilities with strong consulting skills Ability to influence systemic change across the global sustainability context Robust ecosystem of partners integrated into the offerings Differentiated IP, frameworks, and technology assets
Go-to-market strategy: The How? (25%)	<ul style="list-style-type: none"> Nature of investments (M&A, R&D, others) Co-creation with customers and co-development with partners Innovative commercial structures 	<ul style="list-style-type: none"> Established supply chain practice Clearly defined go-to-market strategy Mainly effort-driven client relationships 	<ul style="list-style-type: none"> Horizon 1 + Ability to bring together all capabilities of the organization in an easy-to-understand and simple-to-consume way Supply chain-specific investments Outcome-driven client relationships 	<ul style="list-style-type: none"> Horizon 2+ Market-leading internal and external investments Driving co-creation with clients and partner ecosystem Purpose-led relationships driving growth and innovation for clients
Market impact: The So What? (25%)	<ul style="list-style-type: none"> Scale and growth of supply chain services (customers, revenue) Demonstrable client case studies (multi-industry, magnitude, nature of outcomes) Voice of the Customer 	<ul style="list-style-type: none"> Referenceable and satisfied clients Strong execution credentials Primarily a vendor-client relationship 	<ul style="list-style-type: none"> Horizon 1+ Referenceable and satisfied clients for ability to innovate and execute Strategic partner 	<ul style="list-style-type: none"> Horizon 2 + Referenceable and satisfied clients driving new business models Perceived as a thought leader

3

Executive summary and supply chain services market dynamics

Executive summary (1/2)

1 What's happening?

- Enterprises are increasingly focusing on resilience and agility, adapting their strategies to mitigate disruptions from global events such as pandemics and geopolitical tensions. There is a substantial push toward digitalization, with the integration of AI, IoT, and analytics technologies to enhance transparency, efficiency, and security across networks. Additionally, sustainability has become a critical component, as businesses strive to reduce environmental impact and ensure ethical practices throughout their supply chains. This shift not only reflects a response to regulatory pressures but also aligns with a growing consumer expectation for responsible and responsive business practices. Overall, these changes are reshaping supply chains into more dynamic, interconnected, and accountable systems, capable of supporting the complex demands of today's global market.

2 Key observations

- **Increased Emphasis on Resilience:** Enterprises are restructuring their supply chains to be more resilient against disruptions. This involves diversifying suppliers and logistics partners, incorporating more robust risk management frameworks, and enhancing visibility across the supply chain to respond quickly to unforeseen events.
- **Adoption of sustainability:** There's a clear shift toward integrating sustainability into supply chain strategies. Companies are focusing on reducing environmental impact by optimizing logistics, using sustainable materials, and enforcing compliance with environmental standards across their supply chain networks. However, enterprises believe providers can do a much better job of embedding sustainability into their engagements.
- **Technological integration:** Digital transformation is a major strategic focus, with companies integrating IoT, AI, and blockchain to enhance efficiency, transparency, and security. This includes using AI for predictive analytics in inventory management and blockchain for improved traceability and fraud prevention.
- **Customer-centric supply chain:** Strategies are increasingly designed around customer needs and demands. This includes faster delivery options, customization, and enhancing the customer experience through technology, such as real-time tracking of shipments and automated customer service interfaces.
- **Collaborative ecosystems:** There's a growing trend toward creating collaborative ecosystems that include suppliers, partners, and even competitors. This approach leverages shared technology platforms and data insights to drive efficiencies and innovate supply chain solutions collectively.

3 Supply Chain service providers —the winners revealed

- The report reviews 18 supply chain service providers, with 15 distinctly analyzed. Seven providers are classified as leaders in Horizon 3, nine as innovators in Horizon 2, and two as disruptors in Horizon 1. Horizon 3 firms such as Accenture, Capgemini, EY, Genpact, IBM, TCS, and Tech Mahindra are recognized for their approach toward networked, autonomous models and comprehensive services in consulting and technology. Providers in Horizon 2, including Cognizant, Deloitte, GEP, HCLTech, Infosys, KPMG, and PwC excel in supporting clients across full supply chain operations. Bristlecone, Neo Tangent, WNS and Wipro positioned in Horizon 1, focus primarily on optimizing and achieving efficient outcomes.

Executive summary (2/2)

4 Voice of the customer

- We surveyed 29 active clients as part of the study. Clients appreciate long-term, true, and transparent partnerships, strong industry and domain knowledge. Provider's customer-centric approach of generating customized solutions that enhance operational and financial outcomes is lauded by the clients. Commitment to customer satisfaction, ability to handle diverse engagements, and proactive digital integration strategies further distinguish the provider in the marketplace.
- While there's considerable buzz about outcome-based models, the majority of contracts are still finalized using the traditional full-time equivalent (FTE) pricing method.
- Although many enterprise leaders include sustainability in their strategic plans, they seem to be unaware of service providers' offerings and are yet to fully explore the sustainability services offered by their providers.
- Clients appear to be satisfied with the ability of their service providers to handle engagements related to digital transformation and modernization.

5 Voice of the partners

- Partners value service providers for their domain expertise, the skill level of their employees, global reach, and the ability to meet clients at any stage of their digital transformation journey, with skills expanding into AI, asset management, and sustainability.
- The service providers' innovation, collaborative ethos, and alignment with clients' commercial interests are key distinguishing factors

Key trends

New service offerings



- **Generative AI integration:** There's a significant push toward integrating generative AI across various facets of supply chain management, from planning and logistics to customer interaction and compliance. This technology is expected to enhance automation, improve decision-making, and create more dynamic and responsive supply chain systems.
- **Sustainability services:** Providers are increasingly offering services to achieve sustainability goals, such as carbon footprint reduction, lifecycle assessments, and sustainable sourcing strategies. These services are crucial for companies aiming to meet regulatory requirements and consumer demands.
- **Digital twins and advanced analytics:** The use of digital twin technologies and advanced analytics is being expanded to offer more detailed insights into operations, enabling predictive maintenance, and optimizing supply chain resilience.

Buying patterns



- **Shift toward subscription and as-a-service models:** There's a noticeable trend toward subscription-based and as-a-service purchasing models. These models provide flexibility, reduce upfront costs, and align with the increasing preference for OPEX vs. CAPEX expenditures in corporate budgeting.
- **Increased demand for customized Solutions:** Enterprises are looking for solutions they can tailor to their specific needs, reflecting a move away from one-size-fits-all offerings. This customization is particularly prevalent in areas such as AI implementations and data analytics services.

Scope of work



- **Global expansion:** Organizations are increasingly designing supply chain solutions to support global operations, with a focus on integrating cross-border supply chains and managing international compliance and logistics challenges.
- **Focus on resilience and agility:** Services are being developed to enhance the resilience and agility of supply chains, enabling Enterprises to respond more swiftly to market changes and disruptions. This includes tools for better risk management and dynamic rerouting of logistics in response to external shocks.

Operating model



- **Collaboration across Sectors:** There's an increasing emphasis on collaboration across different sectors and industries to optimize supply chain operations. This involves partnerships with tech companies, logistics firms, and even competitors to pool resources and capabilities.
- **Leveraging big data and IoT:** The scale of supply chain operations is expanding with the integration of IoT and big data. These technologies enable the handling of vast amounts of data across extensive networks, improving real-time decision-making and operational efficiency.

A few noteworthy supply chain client examples

Digital transformation and automation



- **Automated End-to-End Supply Chain Planning:** A global pharmaceutical company transformed from manual and fragmented planning to a fully integrated digital supply chain, resulting in significant reductions in global inventory costs and improvements in forecast accuracy.
- **Warehouse Automation:** Automating a cold-chain warehouse for a temperature-controlled logistics industry leader led to a 30% increase in average productivity and an 80% reduction in attrition, thereby increasing business margins.

Sustainability



- **Scope 3 Sustainability Reporting and Scope 1 Monitoring:** Scope 3 KPIs were properly set and data models created to capture the right data from 27,000 suppliers. Analyzed the KPIs and designed a scalable data collection and data management approach to meet the needs of Scope 3 emissions reporting from both data quality and governance perspectives for a global pharma company.

Advanced analytics



- **AI-Powered Demand Forecasting and Inventory Management:** Utilizing AI to enhance demand forecasting and inventory management has led to better supply-demand balancing and more efficient use of resources. This was exemplified using Kinaxis RapidResponse for a global pharmaceutical major, achieving a 10% reduction in inventory costs and a 15% improvement in forecast accuracy.

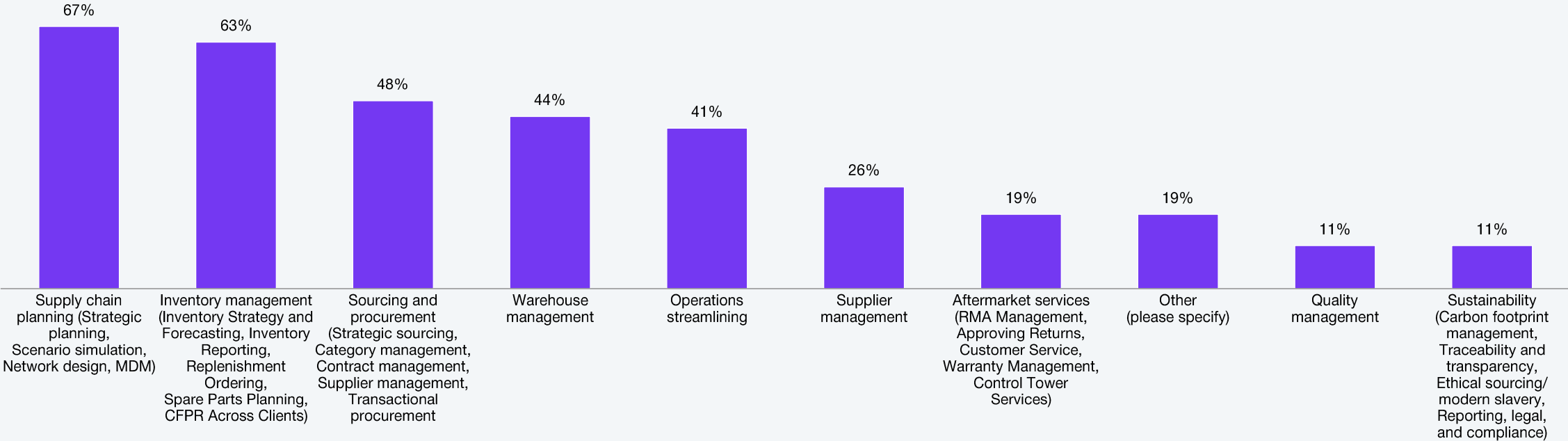
Customized and integrated solutions



- Several companies have implemented tailored solutions that integrate various aspects of supply chain management. For example, setting up an end-to-end supply chain for greenfield electric vehicle (EV) launches led to significant improvements in agility and cost-efficiency.

Majority of supply chain clients are leveraging providers for supply chain planning and inventory management services; sustainability engagements are being awarded in a more centralized manner

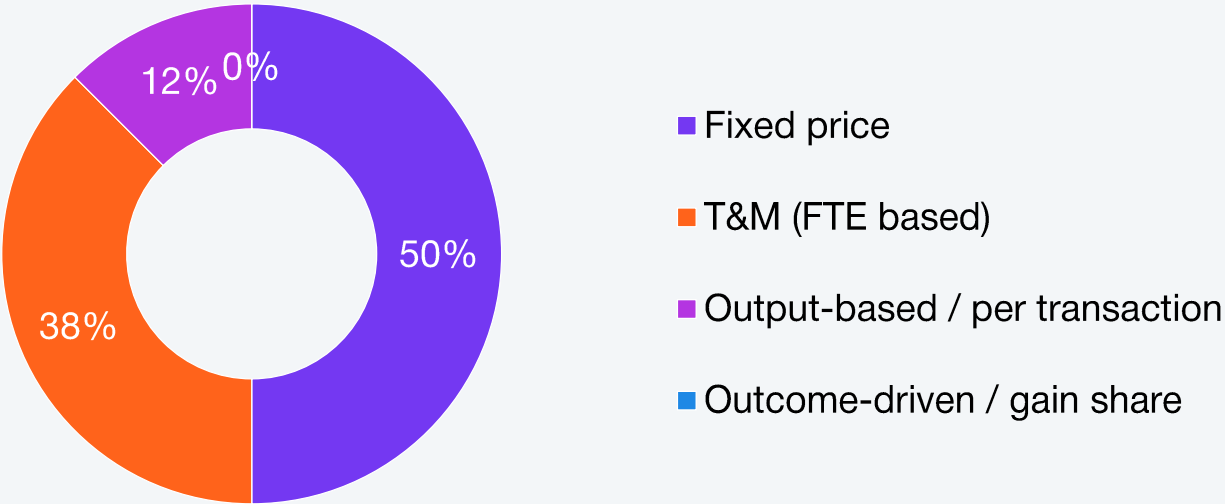
What is included in the scope of your engagement? Please select all that apply



Other (please specify) include artificial intelligence decision assisting, Billing, and payments
 Sample: HFS Horizons survey, Supply chain services, 29 client references
 Source: HFS Research, 2024

Although both providers and clients want to move toward more purpose-led models, less than one-fifth of all engagements follow a hybrid or outcome-based pricing construct

Which of the following options was the most important when selecting this provider?

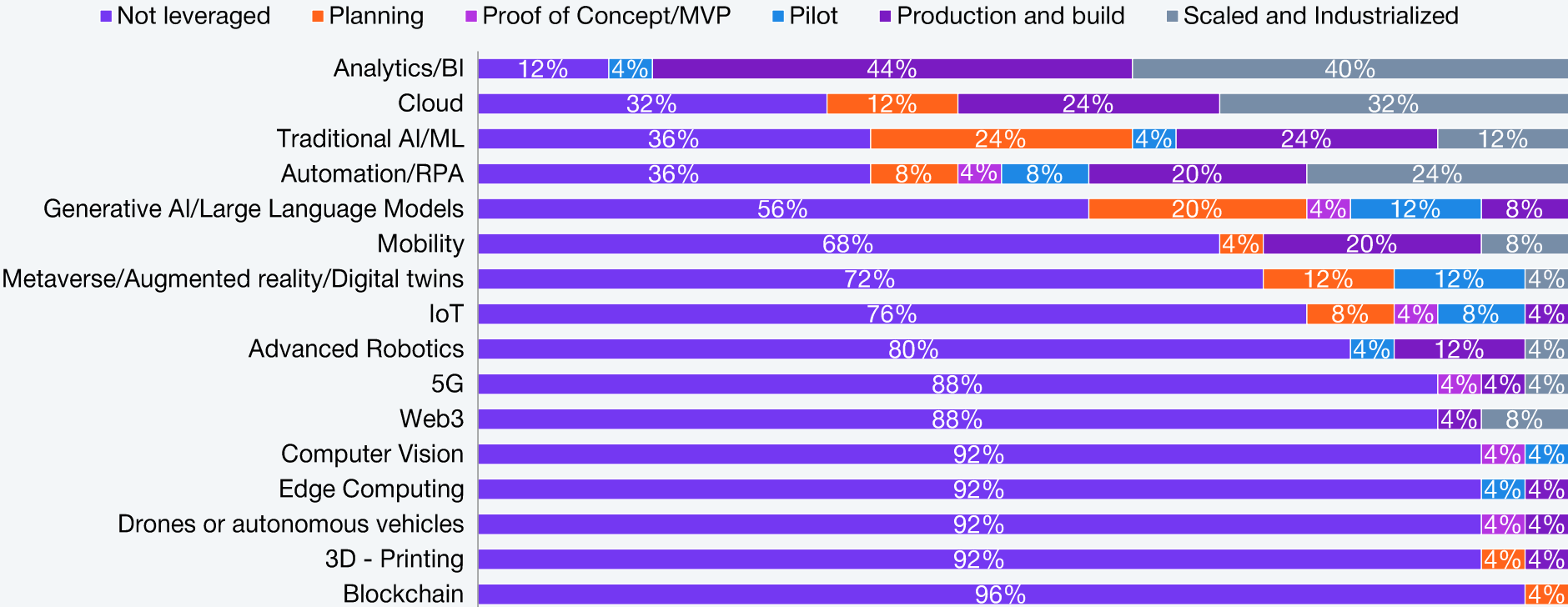


Most of the supply chains are dependent on multiple external factors, making it difficult and risky for clients and providers to commit to outcome-based commercials.

Sample: HFS Horizons survey, Supply chain services, 29 client references
Source: HFS Research, 2024

While analytics and cloud are well leveraged, enterprises are yet to unlock the potential of emerging technologies such as edge computing, computer vision, autonomous vehicles, 3D printing, and blockchain

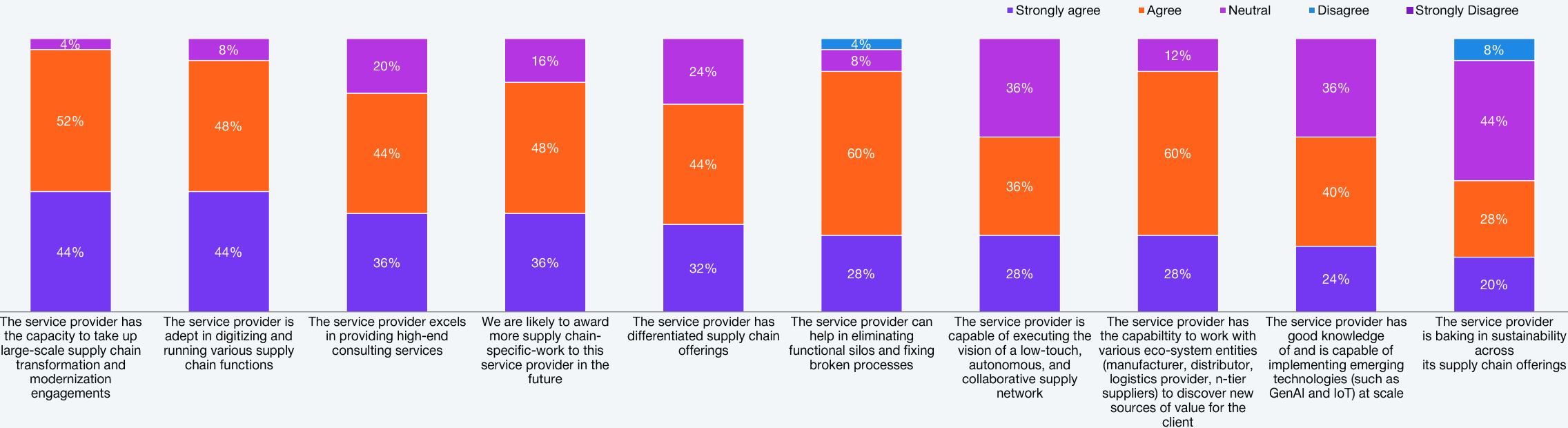
What emerging technologies is the provider leveraging as part of your supply chain engagement? And what is the current stage of implementation?



Sample: HFS Horizons survey, Supply chain services, 29 client references
 Source: HFS Research, 2024

Service providers should communicate their sustainability initiatives more effectively or progress in their efforts to meet or exceed industry benchmarks

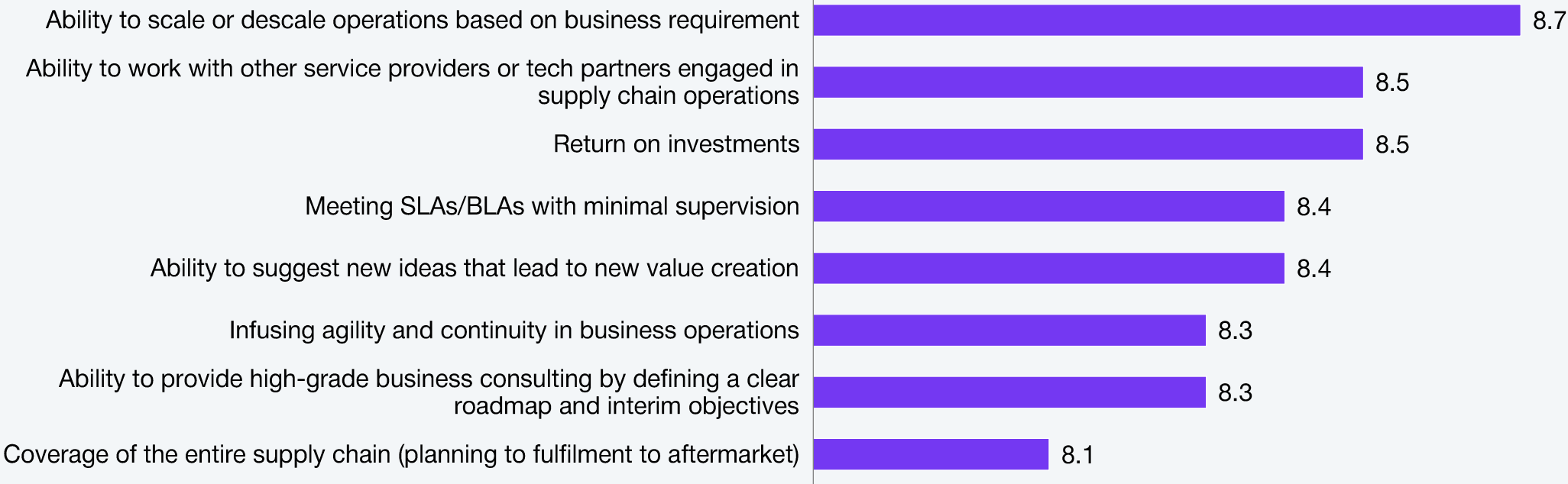
Based on your experience with the service provider, please let us know how much you agree or disagree with the following statements.



Sample: HFS Horizons survey, Supply chain services, 29 client references
 Source: HFS Research, 2024

Clients appear to be not fully informed about the extent of their service providers' supply chain offerings coverage and consulting capabilities

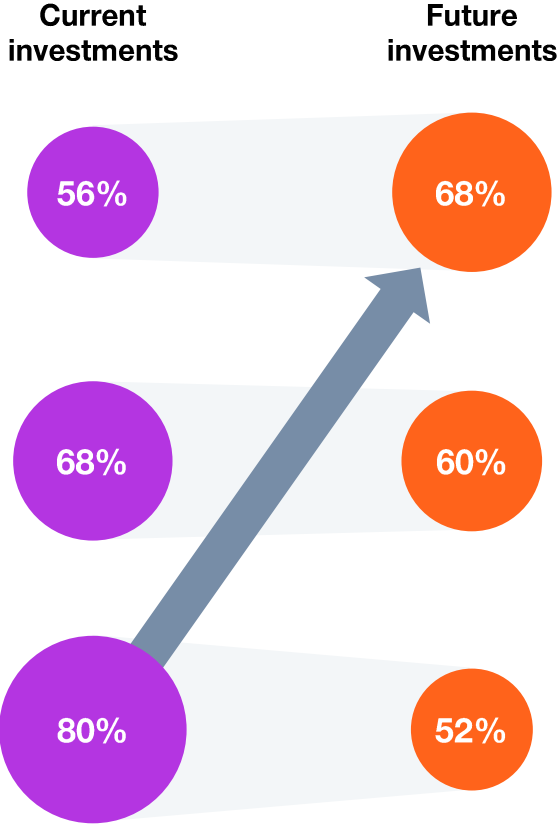
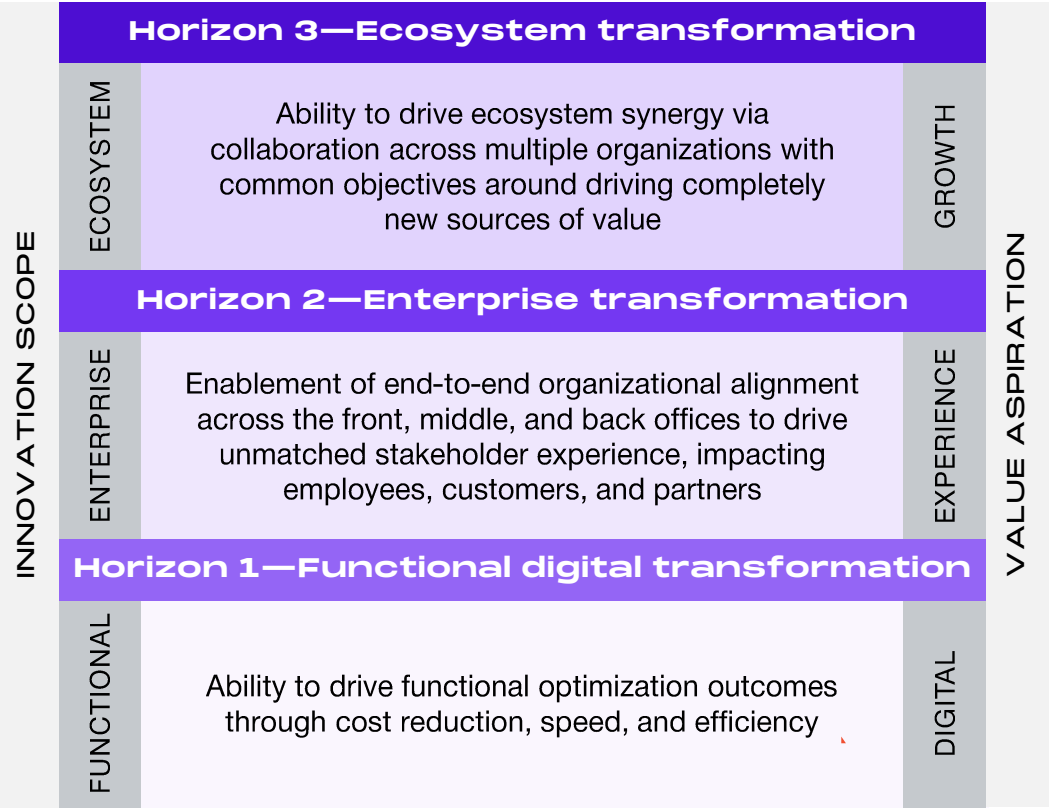
Based on your experience with the service provider, rate it on a 1-10 scale (1 being the lowest and 10 being the highest)



Sample: HFS Horizons survey, Supply chain services, 29 client references
Source: HFS Research, 2024

Businesses are moving their investment focus from optimizing operations through functional transformation to creating low-touch collaborative supply chains via ecosystem synergy

Given your current and future anticipated investments, can you please select the type of engagements you are current investing in, now v/s future? Select all the apply
(Percentage of respondents)



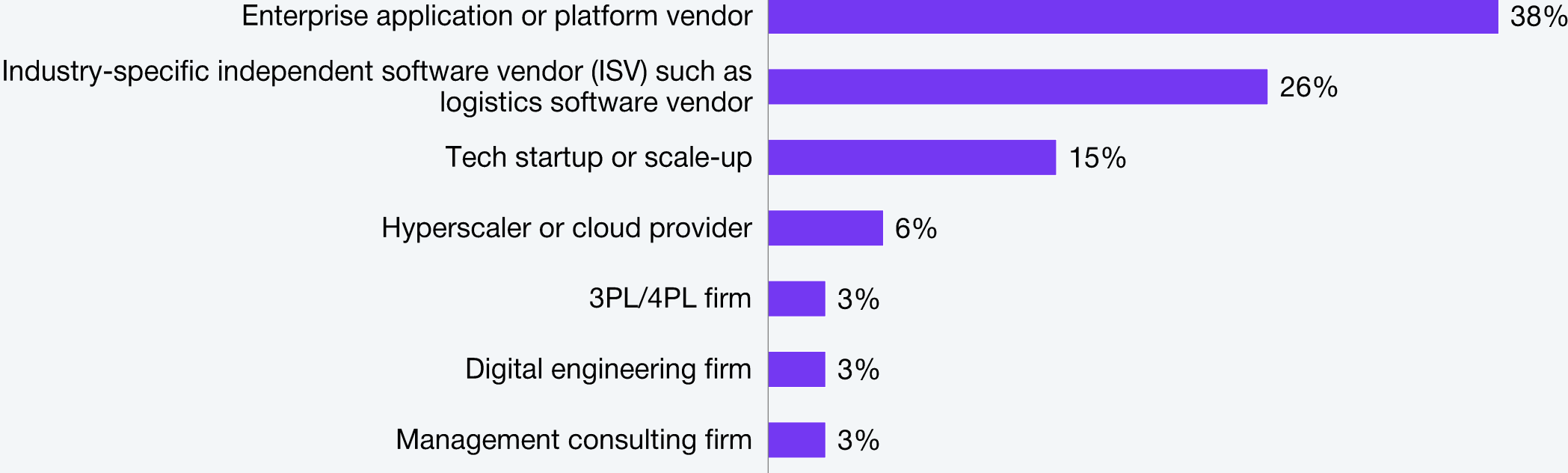
Characteristics

- Building a low-touch, autonomous, and collaborative supply network
- New markets and offerings
- New business models built on cross-industry value
- Moving toward a more circular and sustainable supply chain
- Advanced analytics and insights
- Modernizing selective functions such as intelligent planning or implementing a more dynamic control tower

Sample: HFS Horizons survey, Supply chain services, 29 client references
Source: HFS Research, 2024

There is a growing network of tech startups that providers are leveraging in their supply chain pursuits

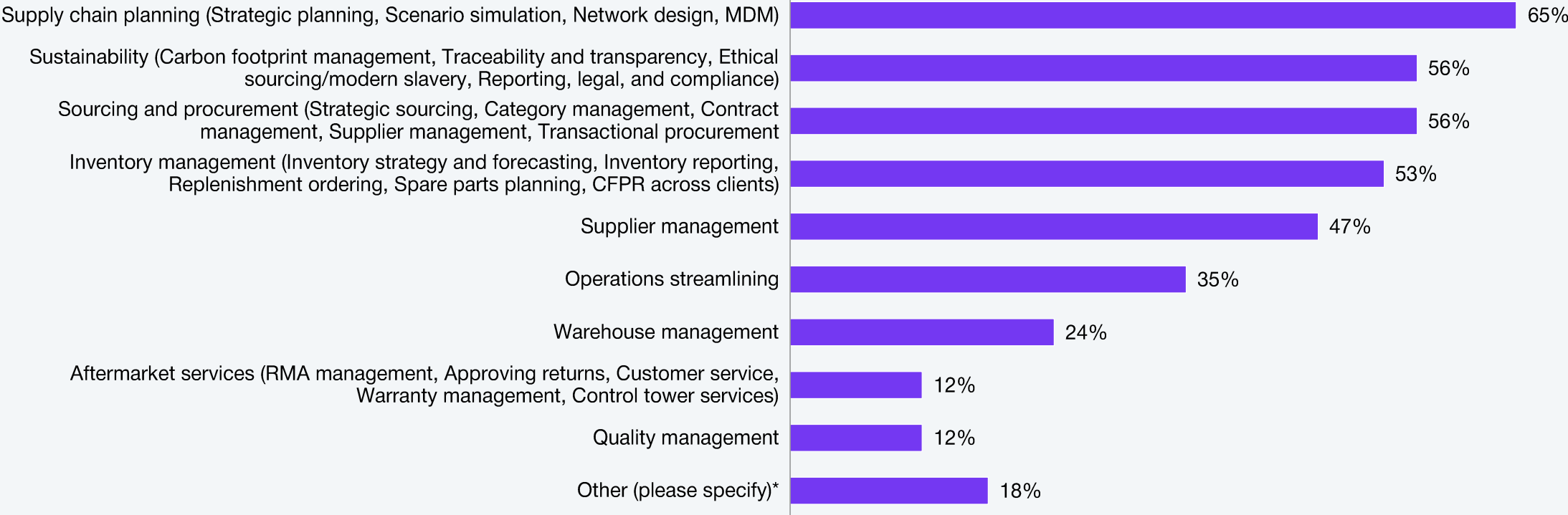
Which of the following statements best describes your firm?



Sample: HFS Horizons survey, Supply chain services, 34 partner references
Source: HFS Research, 2024

Supply chain planning remains the top scope item for partners, akin to enterprise clients

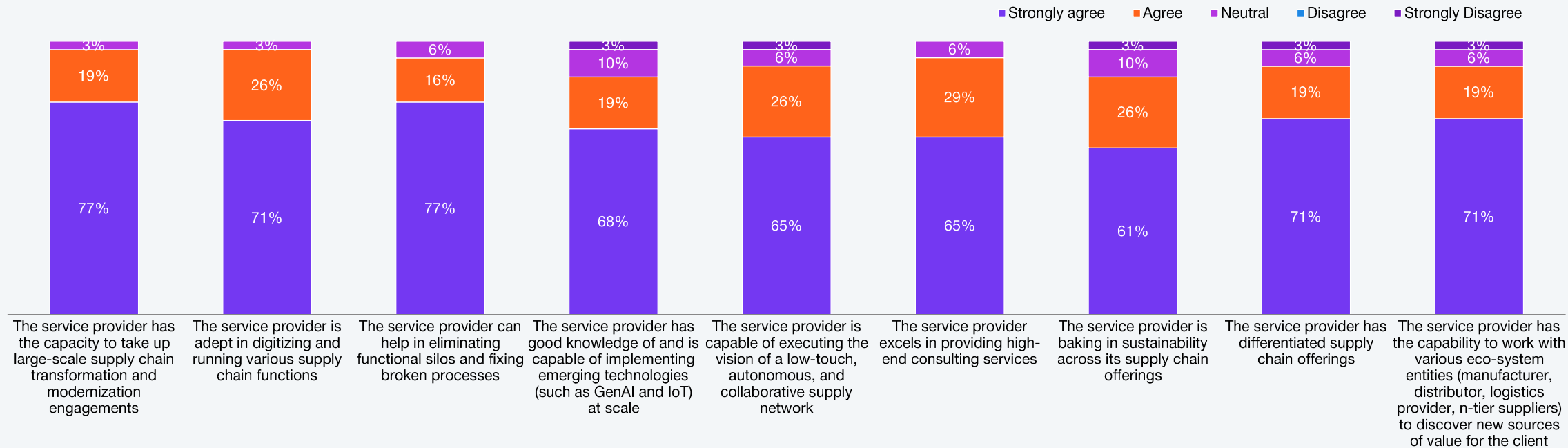
What is included in the scope of your engagement? Please select all that apply



Other (please specify)* includes Document verification, Cross Border, and implementation of the Kinaxis RapidResponse and ServiceNow platform
Sample: HFS Horizons survey, Supply chain services, 34 partner references
Source: HFS Research, 2024

Partners appreciate service providers' all-round capabilities in building modern (autonomous and networked) supply chains

Based on your experience with the service provider, please let us know how much do you agree or disagree with the following statements.

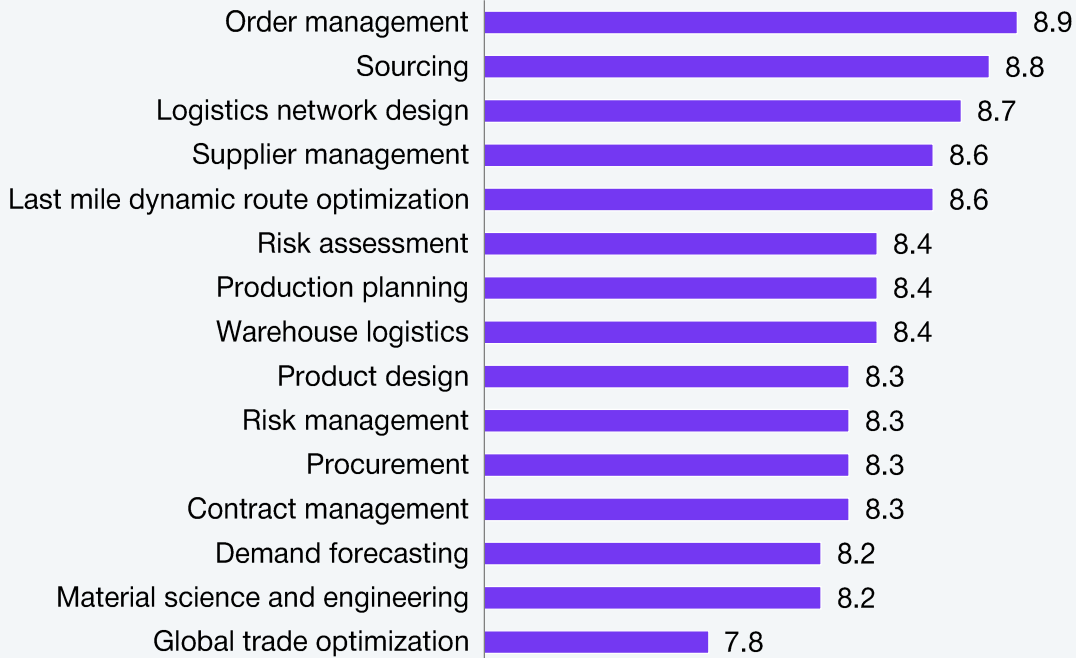


Sample: HFS Horizons survey, Supply chain services, 34 partner references
 Source: HFS Research, 2024

Customers and partners believe providers have strong expertise across all supply chain functions

Rate the provider's expertise in executing the following supply chain activities. Attempt only those where you have first-hand experience. Please use a scale of 1 to 10, where 1 is poor, and 10 is excellent.

Client references



Partner references



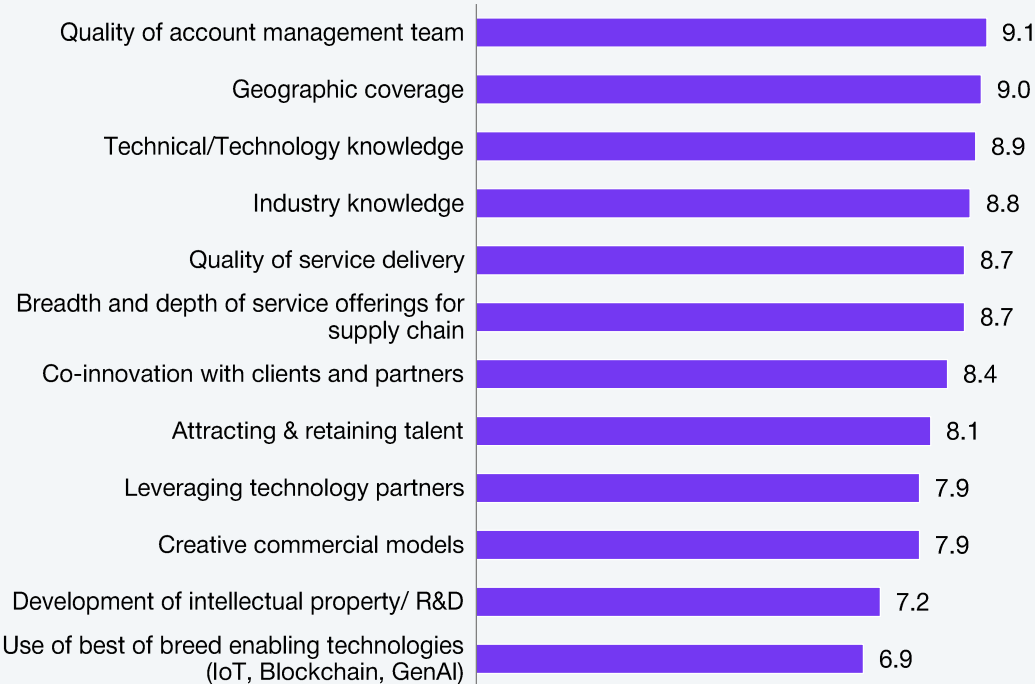
Sample: HFS Horizons survey, Supply chain services, 29 client references
Source: HFS Research, 2024

Sample: HFS Horizons survey, Supply chain services, 34 partner references
Source: HFS Research, 2024

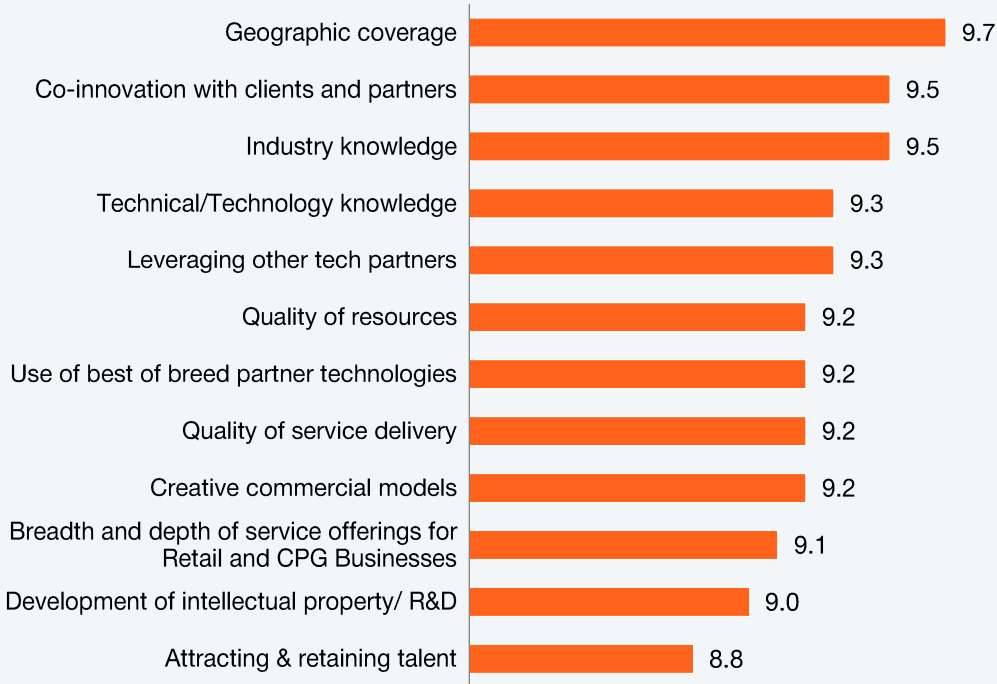
Clients believe providers have significant room for improvement in leveraging emerging technologies such as GenAI, IoT, and Blockchain in their supply chain engagements

Based on your experience with the service provider, rate the following on a scale of 1-10 scale (1 being the lowest and 10 being the highest)

Client references



Partner references



Sample: HFS Horizons survey, Supply chain services, 29 client references
Source: HFS Research, 2024

Sample: HFS Horizons survey, Supply chain services, 34 partner references
Source: HFS Research, 2024

4

Horizons results: Supply chain services, 2024

HFS Horizons—a summary of supply chain service providers assessed in this report

Providers (alphabetical order)	HFS point of view
Accenture	Aiding supply chains with cutting-edge AI tech ecosystem
Bristlecone	Delivering supply chain resiliency, efficiency, and visibility through cutting-edge AI solutions
Capgemini	A supply chain orchestrator to develop future-ready autonomous supply chains
Cognizant	Supporting global supply chain operations with innovative technology and strategic partnerships
Deloitte	Leading supply chain transformation with consulting-led innovative and sustainable solutions
EY	Working toward global supply chain resilience and sustainability for the private and public sector
Genpact	Building sustainable supply chain excellence with advanced AI integration
GEP	Optimizing supply chains with AI-driven insights, cost efficiency, and sustainable practices
HCLTech	Delivering robust supply chain resilience through digitalization, data-driven insights, and sustainability-focused innovations

Providers (alphabetical order)	HFS point of view
IBM	Integrating supply chain management with AI and cloud integration
Infosys	Focused on improving supply chain efficiency with Next-Generation AI and global expertise
KPMG	Empowering businesses with strategic, technology-driven supply chain solutions for competitive advantage
Neo Tangent	Driving innovation and efficiency with end-to-end offerings, fostering resilient and sustainable supply chain solutions
PwC	Global business operations with consulting expertise, varied experience and technology focus
TCS	Driving supply chain excellence through digital transformation and global expertise
Tech Mahindra	Working toward creating smart and sustainable supply chain management
Wipro	Empowering enterprises with innovative, AI-driven supply chain strategies for enhanced resilience and optimized operational efficiency
WNS	Empowering resilient, agile supply chains through analytics-led solutions and sustainable practices

HFS Horizons: Supply Chain Services, 2024



Horizon 3—modern supply network

Service providers demonstrate Horizon 2 capabilities, plus

- Networked, autonomous and collaborative vision of supply chain “systems” driving new value
- Supply chain consulting, technology, and managed services at scale
- Ability to influence systemic change across the global sustainability context
- Robust ecosystem of strategic and delivery partners integrated into offerings
- Market-leading investments with differentiated IP, frameworks, and technology
- Driving co-creation with both the client and partner ecosystem
- Perceived as a thought leader with purpose-led relationships

Horizon 2—circular and cross-organizational

Service providers demonstrate Horizon 1 capabilities, plus

- Driving circular supply chains with strong sustainability narrative
- Ability to transform and support clients across end-to-end supply chains
- Bringing together all the capabilities of the provider and client organizations
- Referenceable and satisfied clients for ability to innovate and execute
- Strategic clients and ecosystem partners with output and outcome-driven relationships
- The aim is to improve stakeholder experience throughout the supply chain

Horizon 1—optimization and outcomes

Service providers demonstrate


- Can drive functional digital transformation via cost reduction, speed, and efficiency
- Established supply chain practice; client and partner-backed technical capability
- Clearly defined go-to-market strategy and value proposition
- Emerging sustainability narrative
- Emerging ecosystem of partners
- Primarily a vendor-client relationship with mainly effort and project-based engagements

Note: All service providers within a Horizon are listed alphabetically.
Source: HFS Research, 2024

5

Capgemini profile: Supply chain services, 2024

Capgemini: A supply chain orchestrator to develop future-ready autonomous supply chains

HORIZON 3 – Market Leader	Strengths	Development opportunities
	<ul style="list-style-type: none"> • Value proposition: Delivering resilient, AI-powered supply chain solutions for sustainable and efficient global operations. • Key differentiators: Approximately 15,000 supply chain experts worldwide with deep industry knowledge across various sectors. Acts as a supply chain orchestrator, offering end-to-end supply chain from business model consulting to manufacturing to logistics orchestration in a silo-less manner, supported by advanced analytics and AI. Partnership with Keuhne+Nagel has increased Capgemini’s value proposition around end-to-end supply chain orchestration (5PL) including logistics management and execution • Technology innovation: Capgemini has a highly mature SAP (S/4HANA) practice that includes location-based services, intelligent shipping, and analytics. In partnership with SAP, Capgemini has developed a suite of tools and frameworks to support supply chain optimization and sustainability. It excels in running smart factories via the Integration of AI and IoT to enhance manufacturing efficiency and reduce carbon footprints. • Client and partner reference kudos: The clients appreciate the Capgemini team’s flexibility and deep understanding of the company’s structure, emphasizing a true partnership. Meanwhile, partners appreciate collaborative culture, and sustainability efforts, including expertise in carbon accounting and circular economy. 	<ul style="list-style-type: none"> • What we’d like to see more of: Continue their focus on sustainable supply chain solutions that reduce carbon footprints and enhance environmental responsibility. • Opportunity in the next 12 months: Expanding its capabilities in blockchain for enhanced supply chain transparency and security. • Client and partner reference critiques: Clients expect Capgemini to operate interconnectedly across the consulting, IT, and BPO organizations.
HORIZON 2 – Enterprise Innovator		
HORIZON 1 – Disruptor		

Key offerings	Mergers and acquisitions (2020–2024)
<p>Sustainable supply chain strategy and operating model; sustainable procurement & supplier collaboration - visibility and collaboration to improve resilience, scope 3 emissions, response time for new products and personalization; touchless forecasting & integrated business planning; smart manufacturing; order orchestration & smart flow execution - Intelligent order management and allocation, autonomous warehousing, transportation, innovating last-mile delivery; reverse supply chain - carbon footprint tracking, design and deploy reverse supply chains; E2E network resilience & sustainable performance control: digital twins, event monitoring, what-if scenario simulation and risk management for disruption-ready networks</p>	<ul style="list-style-type: none"> • Altran (2020): Provider of engineering and R&D services • Quantmetry (2022): AI and data consulting capabilities • Unity’s Digital Twin Professional Services (2024): 3D visualization software capabilities • BTC Corporation (2023): cloud and digital end-to-end services • Aodigy Asia Pacific Pte Limited (2022): Salesforce-based digital transformation

Partnerships	Key clients	Global operations and resources	Flagship internal IP
<p>Mistral AI, Kinaxis, Kuehne+Nagel, iValua, Beeline, UiPath, Fairmarkit, Celonis, Emitwise, AWS, Microsoft, Google Cloud, Blue Yonder, E2open</p>	<p>Number of supply chain clients: 1,600+</p> <p>Key clients:</p> <ul style="list-style-type: none"> • British multinational fast-moving consumer goods company • American multinational tobacco company • American multinational food, snack, and beverage corporation • American consumer health company 	<p>Supply chain headcount: 14,600</p> <p>Delivery and innovation centers:</p> <p>America: Canada, US, Mexico, Guatemala, Brazil Europe and Africa: Norway, Netherlands, UK, France, Spain, Portugal, Morocco, Sweden, Luxembourg, Poland, Germany, Romania, Italy, Egypt, UAE APAC, India and Oceania: India, Singapore, Japan, China, Australia, The Philippines</p>	<ul style="list-style-type: none"> • X-IoT: For IoT strategy and deployment • IBI: Intelligent Business Insights • eXist: Apps dev for human-device connecting • VIMS and I4SSM: Digital twin and simulation • Andy3D: Remote and on-field assistance • PredictEAP: Engineering analytics accelerator • iSCAPE: Internal platform for value tech solutions

6

HFS Research authors

HFS Research authors



Ashish Chaturvedi is a Practice Leader at HFS covering supply chain, retail & CPG, and disruptive technologies. Ashish is an accomplished IT industry analyst and RetailWire BrainTrust and CIO.com member. With over 14 years of technology research experience, Ashish has authored more than 80 research reports spanning retail technologies, enterprise modernization, low-code/no-code development, digital benchmarking, platform economy, and IT sourcing.

Over the years, Ashish has advised several senior executives on digital strategy, product/service planning, next-gen technologies, and IT procurement. He has delivered several multidisciplinary research engagements, including provider and market intelligence reports, go-to-market workshops, white papers, podcasts, and research-based advisory.



Saurabh Gupta is President, Research and Advisory Services at HFS. He sets the strategic research focus and agenda for HFS Research, understanding and predicting the needs of the industry and ensuring that HFS maintains its position as the strongest impact thought leader for business operations and services research. He oversees HFS' global research function, managing the global team of analysts and operations across the US, Europe, and Asia.

He is a recognized thought leader, and he's passionate about solving business problems and bringing big ideas to life. With more than two decades of experience across client, provider, advisory, and analyst roles, he brings a uniquely realistic and wide-ranging perspective to our industry's challenges and opportunities. He has authored more than 200 research reports; he is a frequent speaker and regularly quoted in industry publications. He is well-known for spotting disruptive technology trends like blockchain, Web3, metaverse, cloud, AI, and automation and predicting their implications for different stakeholders through frameworks like the OneOffice™ and OneEcosystem™.



Krupa is a Senior Analyst at HFS Research, and she is part of data products. She is responsible for ITO-BPO outsourcing contracts, merger and acquisition data collection and analysis for different service lines. She also works with practice leads with the focus around Business process services and digital technologies

She has over four years of experience in business research and analysis in Excellence4U Research Services and Futurecorp Consulting. She was the part of the market research team, where her responsibilities were performing secondary research for company profiling, industry analysis and competitive analysis. At Excellence4U, she worked with technology mapping team that helped to know the clients, the products that were used which would help them to understand the need of customers.

About HFS

- **INNOVATIVE**
- **INTREPID**
- **BOLD**

HFS is a leading global research and analysis firm trusted at the highest levels of executive leadership. Our mission is to help our clients—major enterprises, tech firms, and service providers—tackle challenges, make bold moves, and bring big ideas to life by arming them with accurate, visionary, and thought-provoking insight into issues that impact their business.

Our analysts and strategists have deep, real-world experience in the subjects they cover. They're respected for their independent, no-nonsense perspectives based on thorough research, demand-side data, and personal engagements with industry leaders.

We have one goal above all others: to propel you to success.



www.hfsresearch.com



[hfsresearch](https://www.linkedin.com/company/hfsresearch)



www.horsesforsources.com