Everest Group®

Everest Group Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2025

Focus on Genpact

August 2025

PEAK MATRIX®

Introduction

Geopolitical uncertainty, rising trade barriers, cost pressures, evolving consumer behavior, and accelerated technological advances are reshaping how enterprises manage their supply chains. SCM BPS providers play a critical role in helping enterprises maintain operational continuity and drive transformation in such scenarios. They support clients by optimizing processes, enabling technology adoption, and adopting industry best practices. To meet evolving enterprise expectations, service providers are integrating generative and agentic AI capabilities into existing solutions and building use cases and point solutions that deliver value and impact.

As buyers show increasing willingness to outsource upstream functions such as supply chain planning, service providers are expanding the breadth and depth of their supply chain capabilities by developing in-house solutions and partnering with best-of-breed technology providers and core supply chain players. Service providers are also leveraging their industry expertise to support clients in establishing, scaling, and transforming their Global Capability Centers (GCCs).

In the research, we present two assessments on service providers featured on the SCM BPS PEAK Matrix® Assessment and SCM Planning BPS PEAK Matrix® Assessment. The assessments are based on Everest Group's annual Request for Information (RFI) process for the calendar year 2025, interactions with leading supply chain management service providers, client reference checks, and an ongoing analysis of the SCM business process services market.

The full research focuses on:

- SCM BPS PEAK Matrix 2025
- SCM planning BPS PEAK Matrix 2025
- Service provider capability assessment
- Observations and comments on individual service providers

Scope of this report

Geography: global

Providers: 16 SCM providers

Services: SCM BPS and SCM planning BPS

Supply chain provider landscape

Key focus of this report [NOT EXHAUSTIVE]

	Operations	Consulting
Broad-based providers	accenture, Capgemini, Cognizant, EXL, EY, genpact, HCLTech, IBM, Infosys, neoTANGENT Evangelizing Business Processes, pwc, tcs TATA CONSULTANCY SERVICES, TECH mahindra, WNS, wipro	BAIN & COMPANY, BCG, Deloitte., KPMG, McKinsey & Company
Focused providers	CORBUS A Soin Company, GEP, SUTHERLAND	CAMELOT Management Consultants, Maine Pointe Total Value Optimization • Guaranteed

Technology providers

ERP platforms	Planning and control tower platform providers	Intelligent automation providers	Master data management	Supply chain risk management and sustainability-focused solution providers	Visibility platforms (TMS, WMS, LMS, etc.)
Microsoft, ORACLE, salesforce, SAP	Anaplan, b2wise, BlueYonder Fulfill your potential, coupa, e2open, Kinaxis, o9, Palantir	AUTOMATION ANYWHERE Go be great., SS&C blueprism, UiPath, workato	Informatica, talend A Qlik Company	B2X, earthster, Prewave, SUPPLY WISDOM, resilinc	DESCARTES, FOURKITES, Manhattan Associates, project44

Supply Chain Management (SCM) BPS PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Genpact, and TCS

- Leaders have strengthened their position in the SCM market with strong growth and expansion
- Leaders demonstrate strong capabilities in orchestrating end-to-end services across SCM. They bring a portfolio of consulting, technology, and operations services tailored to enterprises' requirements
- They are strengthening SCM capabilities through continuous investments in AI, expanding delivery networks and strategic partnerships with specialist tech providers and hyperscalers
- Leaders' capabilities include supporting clients with GCC requirements through new engagement models and dedicated service lines
- They also leverage their wide delivery presence to better serve clients across their business locations

Major Contenders

Cognizant, GEP, HCLTech, IBM, Infosys, Neo Tangent, Sutherland, Tech Mahindra, Wipro, and WNS

- Some Major Contenders provide end-to-end support; however, most have experience and expertise in specific areas of the value chain. They are actively investing in building solutions and capabilities to address existing gaps and enable broader supply chain service delivery
- Their focus is on capability expansion, partnering with specialist technology providers and hyperscalers to co-develop new offerings, and enhancing in-house tools by embedding emerging technologies
- Some Major Contenders also support clients with GCC requirements
- They provide modular offerings, point solutions, and proactive customer support to address specific client requirements and provide a high level of flexibility in pricing and engagement models

Aspirants

Corbus and EXL

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

Supply Chain Management (SCM) Planning BPS PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, and Genpact

- Leaders stand out through end-to-end planning domain expertise, planning-focused technology partnerships, and the ability to drive large-scale transformation
- They provide comprehensive planning support across demand forecasting, scenario planning, and master production scheduling through a mix of in-house solutions and third-party partnerships
- They are strengthening planning capabilities through strategic alliances and nurturing techno-functional talent for advanced planning and analytics capabilities
- Leaders are increasingly supporting buyers with upstream strategic planning processes, moving beyond traditional tactical operations
- They also offer value-added services such as supply chain stress testing, end-to-end supply chain segmentation, and robust data management

Major Contenders

GEP, HCLTech, IBM, Infosys, Neo Tangent, TCS, and Wipro

- Major Contenders adopt diverse strategies, with some focusing on system implementation and maintenance, while others approach through consulting, transformation, and technology-first solutions
- They typically specialize in specific segments of the planning process, with a few offering end-to-end planning support
- While they continue to invest in planning capabilities, they operate at a smaller scale compared to Leaders
- Most Major Contenders leverage their third-party partnerships to support client technology requirements for planning, with little to no in-house technology capability
- While they offer value-added services, the breadth and variety are limited compared to Leaders. However, most provide robust data management services as add-on to their core offerings

Aspirants

WNS, Tech Mahindra

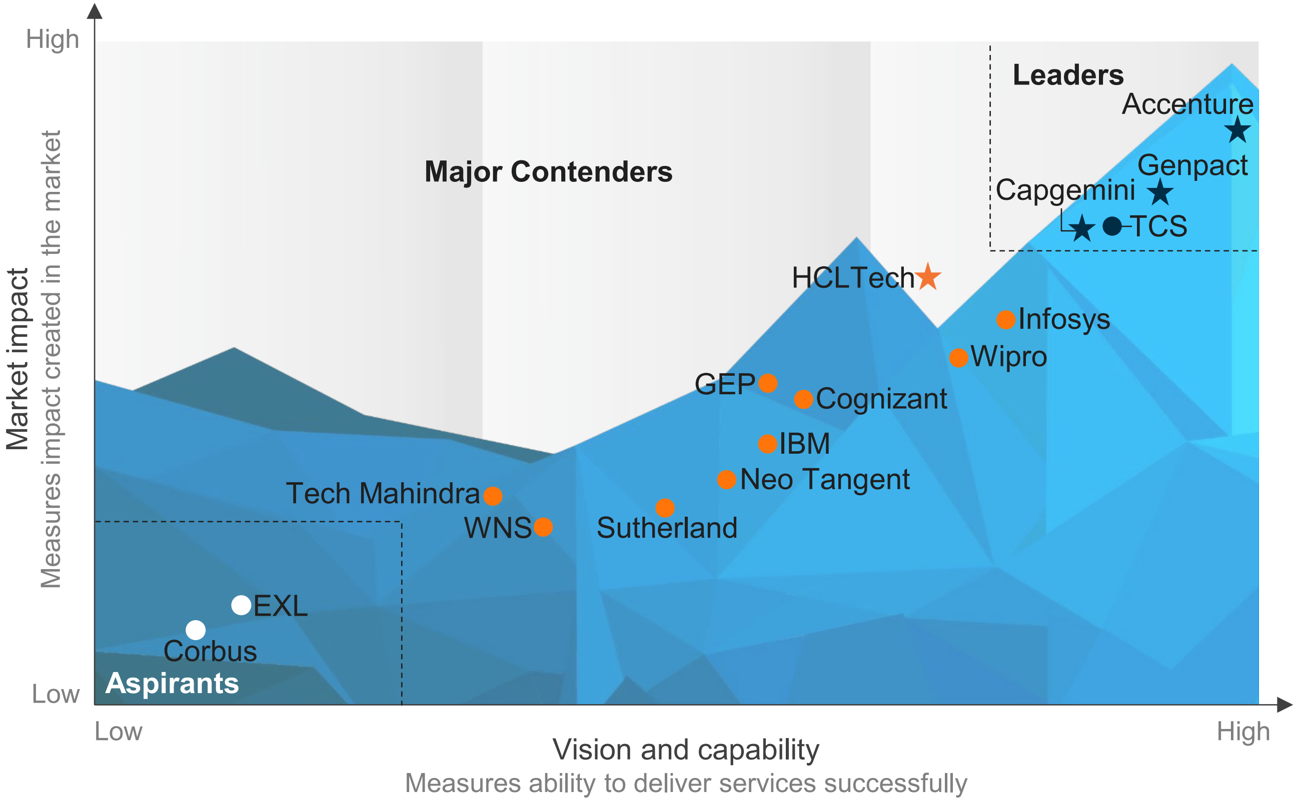
- Aspirants have a relatively small-scale SCM footprint, offering limited upstream planning services supported by modest technology capabilities, and place greater emphasis on downstream operations
- They mainly specialize in implementing planning systems and developing customized planning point solutions with minimal/no managed service offerings

Everest Group PEAK Matrix®

Everest Group Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2025 | Genpact is positioned as a Leader and a Star Performer

Everest Group Supply Chain Management (SCM) BPS PEAK Matrix® Assessment 2025[1]

- Leaders
- Major Contenders
- Aspirants
- Star Performers

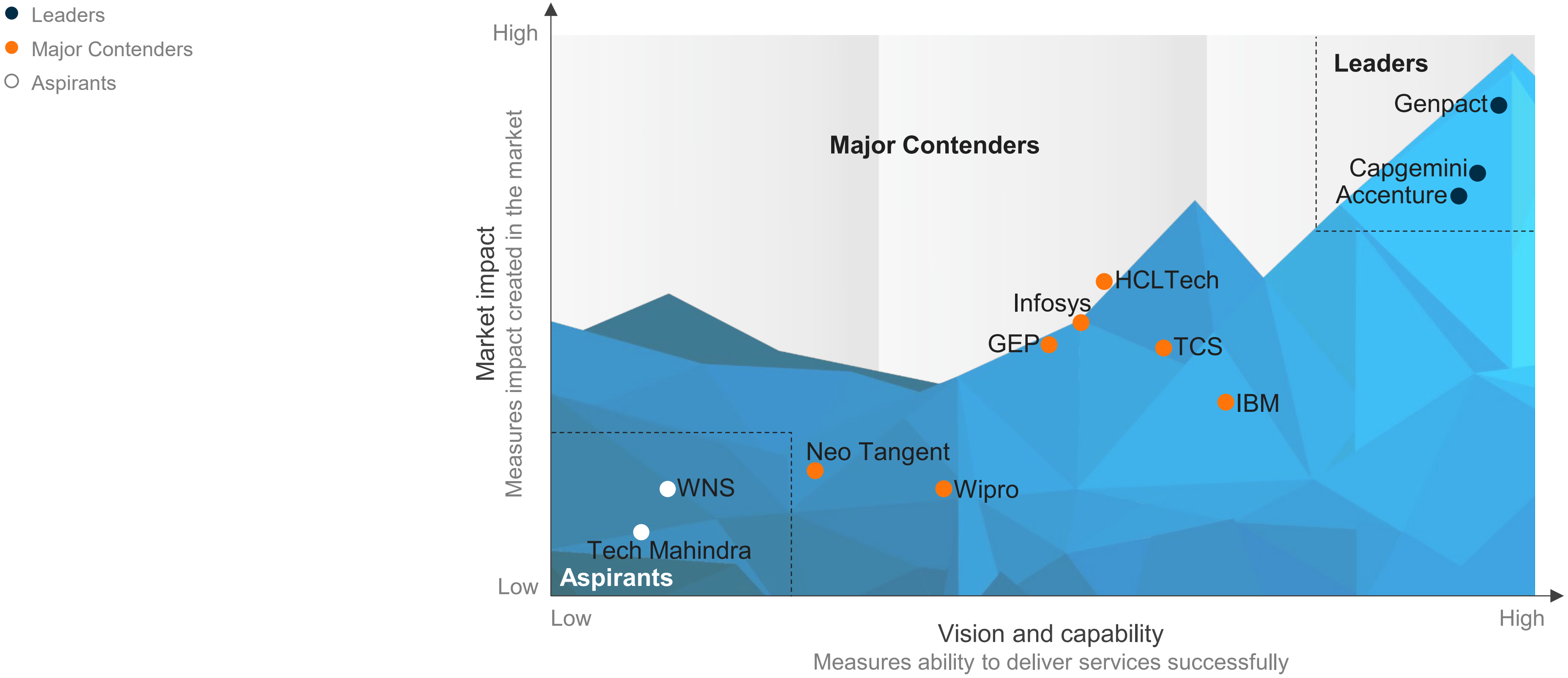


1 Assessments for Cognizant, Corbus, EXL, IBM, and Tech Mahindra exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with SCM buyers
Source: Everest Group (2025)

Everest Group PEAK Matrix®

Supply Chain Management (SCM) Planning BPS PEAK Matrix® Assessment 2025 | Genpact is positioned as a Leader

Everest Group Supply Chain Management (SCM) Planning BPS PEAK Matrix® Assessment 2025[1]



1 Assessments for IBM and Tech Mahindra exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with SCM buyers
Source: Everest Group (2025)

Genpact (page 1 of 3)

Everest Group SCM BPS assessment – Leader and Star Performer
Everest Group SCM Planning BPS assessment – Leader

Measure of capability: Low High

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

Strengths

- Genpact offers comprehensive SCM services through integrated consulting, managed services, and technology capabilities, employing a transformation- and outcome-focused approach. It also integrates its adjacent procurement offerings and leverages an extensive global delivery network to enable digital and operational transformation
- It offers a suite of solutions including supply chain orchestration, enterprise planning and control tower, inventory planning, OTIF Analyzer, and Supply Chain Resilience Evaluation Integration and Monitoring (SCREIM) solution. Clients often appreciate its technology expertise along with process expertise
  - It leverages a broad partner ecosystem with providers across categories, such as planning and control tower solutions (Blue Yonder and E2Open), automation platforms (UiPath and Automation Anywhere), ERP systems (Oracle and SAP), and process-mining tools (Celonis)
- Genpact leverages AI-based technologies for operations and solutions across the value chain. It runs innovation centers in India, the UK, and Romania, plus a generative AI-focused CoE in LATAM, and partners with hyperscalers such as Google Cloud, Microsoft, AWS, and Salesforce for scalable AI platforms
- Genpact offers end-to-end planning services at scale across geographies and industries. It combines partner technologies with modular in-house point solutions to support planning processes
  - It offers planning services through an as-a-service model, suitable for SMB and mid-market customers
- It drives talent development through upskilling programs on partner platforms, its in-house Genome Supply Chain Academy and Talent Match (internal resource skills and requirement matching program) initiatives, and continued partnerships with academic institutions (Birla Institute of Technology and Amrita University) and education platform (UpGrad)

Genpact (page 2 of 3)

Everest Group SCM BPS assessment – Leader and Star Performer
Everest Group SCM Planning BPS assessment – Leader

Measure of capability: Low High

	Market impact				Vision and capability				
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SCM BPS									
SCM Planning									

Strengths

- It embeds ESG solutions across planning, make/manufacture, deliver, and after-sales in all its offerings. It partners with carbon-tracking specialists such as Project44, Earthster, and ClearOps to monitor and reduce carbon emissions
- Genpact serves clients worldwide with global delivery centers with recent expansions in Japan and Costa Rica
- Clients appreciate Genpact's seamless solution migrations, flexible engagement models, and strong partner collaboration

Genpact (page 3 of 3)

Everest Group SCM BPS assessment – Leader and Star Performer
Everest Group SCM Planning BPS assessment – Leader

Measure of capability: Low High

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SCM BPS									
SCM Planning									

Limitations

- Clients looking for pure cost savings through labor arbitrage / offshoring or for technology implementation and support may not find Genpact's approach to be suitable
- Genpact has limited experience in supporting clients in design, transformation, transition, or operating their GBS centers in the supply chain space
- Genpact's ability to support clients in emerging geographies such as the Middle East and Africa is yet to be tested, despite its global delivery footprint
- Genpact has limited experience in the healthcare and life sciences and travel and logistics sectors, particularly in after-sales services
- Some clients highlight concerns in change-management support, supply chain planning expertise beyond running operations, and the ability to lead discussions with ecosystem partners and third parties to drive seamless integration with operations

Market trends

SCM outsourcing continues to gain momentum driven by first-time outsourcers, buyer's seeking support to navigate macroeconomic uncertainties, and AI-focused transformations

Market size and growth

- In 2024, the SCM BPS market demonstrated strong growth of 16-18%, despite macroeconomic and geopolitical challenges, to reach US$3.9 billion
- A select few providers are riding this growth, three of the largest SCM service providers now command nearly 50% of the market, further widening the gap with other providers
- With the evolving maturity of agentic AI technology, resulting productivity gains may slightly compress outsourcing services market growth in the short to medium term. However, long-term prospects remain promising, fueled by rising demand for SCM-specific, AI-native solutions with agentic capabilities and ancillary services supporting AI infrastructure

Key drivers

Adoption by first-generation outsourcers	SCM outsourcing is continuing to grow with consistent demand from first-generation outsourcers who turn to providers to reduce cost of operations, accelerate digital adoption, and gain access to talent and domain expertise.
Digital transformation	Buyers are seeking support from service providers to enable digital transformation beyond basic automation. Service providers are expanding their in-house technology capabilities, along with investing in partner ecosystem.
SMB and mid-market	SMB and mid-market buyers are increasingly seeking service provider support for SCM processes. Service providers are catering to their demand through flexible pricing, modular point solutions, and as-a-service models.
Process standardization and centralization	Enterprises with global operations are engaging service providers with SCM process expertise to drive process standardization and centralization aimed at unlocking value and improving efficiency.

Opportunities and challenges

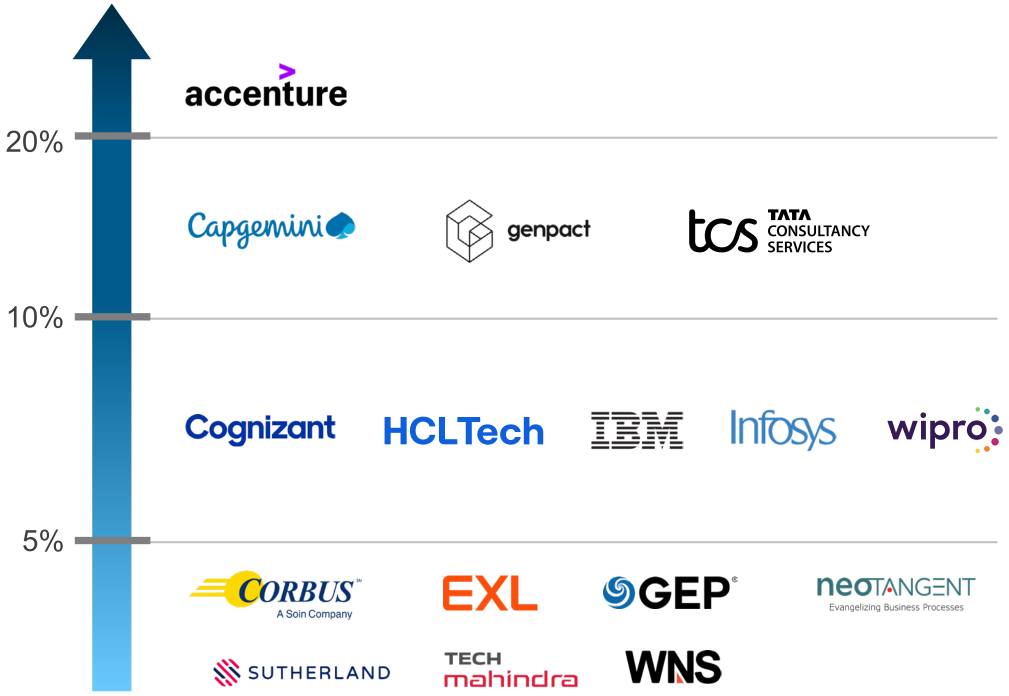
Growing demand for value-add services	Opportunities exist in supporting buyers beyond traditional managed services with risk management, sustainability, and data analytics to improve outcomes.
Data-oriented services	Enterprises' AI interests are often stalled due to data-related challenges. Opportunity lies in supporting buyers with data management, integration, and governance.
Support for AI transformation	While enterprises are eager to adopt AI, initiatives often stall due to gaps in data strategy, AI advisory, and change management, opening opportunities for service providers to be the catalyst.
Macroeconomic uncertainty and tariff risks	Volatile tariffs, protectionism, and geopolitical uncertainly are creating headwinds for SCM outsourcing market growth.
Talent attrition and unavailability of skilled workforce	Continuous attrition is a major concern. Additionally, shortage of techno-functional and AI-ready workforce is a looming challenge.

Provider landscape analysis

The top four providers contributed more than 50% of the market share in terms of ACV

SCM service provider market share

2024; Percentage of active ACV



SCM service provider CAGR

2022-24; growth rate of ACV

Note: Providers are listed alphabetically within each range

Key buyer considerations

Buyers value service providers' domain expertise, end-to-end SCM capabilities, and digital capabilities along with continuing focus on achieving the right value-for-money

Key sourcing criteria

Priority: High → Low

Value-for-money
Ability to deliver process efficiencies within value-for-money pricing on the back of strong domain and industry expertise

End-to-end SCM services capability
Availability of full spectrum SCM services for integrated end-to-end support and to ease scope expansion

Transformation capabilities
End-to-end digital and consulting support to optimize supply chains and drive innovation, resilience, and future-readiness

Global delivery network
Balanced shoring mix across offshore, nearshore, and onshore locations to offer labor arbitrage, time zone and cultural alignment, and multilingual support, as required

Adjacent procurement and F&A BPS offerings
Capability to support adjacent functions for leveraging synergies and enabling cross-functional collaboration

Summary analysis

- Proactiveness in challenging the status quo and driving industry best practices
- Continuous improvement mindset, focus on innovation, and leverage advanced technologies, including AI, to drive efficiencies
- Effective knowledge management to avoid disruption in service delivery due to talent attrition
- Operational rigor with service delivery quality across the length and breadth of operations
- Partnership approach to enable collaboration and imbibe customer-centricity
- Leadership involvement in ensuring seamless service delivery as essential
- Adaptability and flexibility in engagement construct, service delivery, and relationship management

Key takeaways for buyers

Buyers must embrace uncertainty as a constant and evolving element of the business landscape and continue to focus on building resilient supply chains. As AI matures, laying strong foundations across data, processes, and governance will be essential to effectively leverage its potential and drive continuous innovation. Establishing strategic partnership with service providers helps buyers remain at the forefront of transformation.

Expansion in provider capabilities

- Providers are investing in strategic partnerships with hyperscalers (AWS, Microsoft Azure, and Google Cloud) and niche technology providers (Aera Technology, TADA, and Prewave) to leverage AI across supply chain processes by building point solutions and accelerators
- Providers are also broadening functional and industry expertise via targeted acquisitions (OnProcess Technologies, The Joshua Tree Group, and Belcan) that deepen industry-specific capabilities

Differentiation across provider types

- Broad-based firms focus on delivering end-to-end SCM managed services complemented by their orchestration, analytics, and automation capabilities and their ability to offer scalability while ensuring supply chain resilience
- Specialist providers offer deep domain expertise in select SCM processes, tailored managed services, and flexible commercial constructs

Key innovations

Providers are driving next-generation technology capabilities with ongoing investments in generative AI and agentic AI. Currently, use cases are being developed across demand forecasting, risk intelligence, track and trace, and broader intelligence solutions

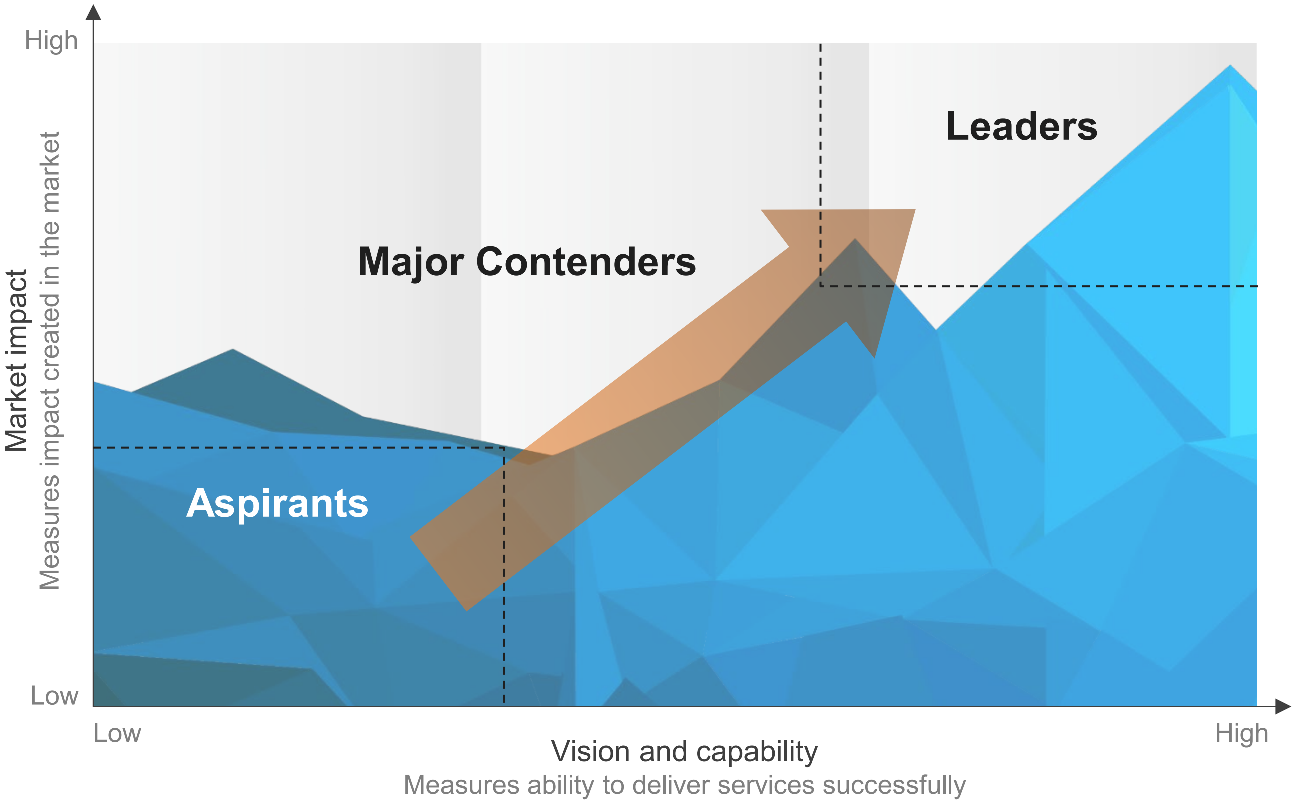
Appendix

PEAK Matrix® framework

FAQs

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

Everest Group PEAK Matrix



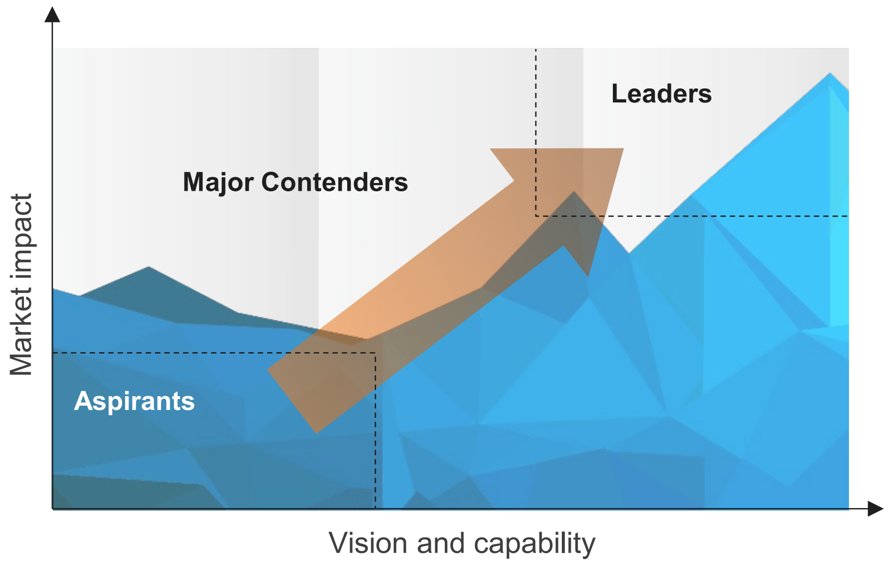
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



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

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

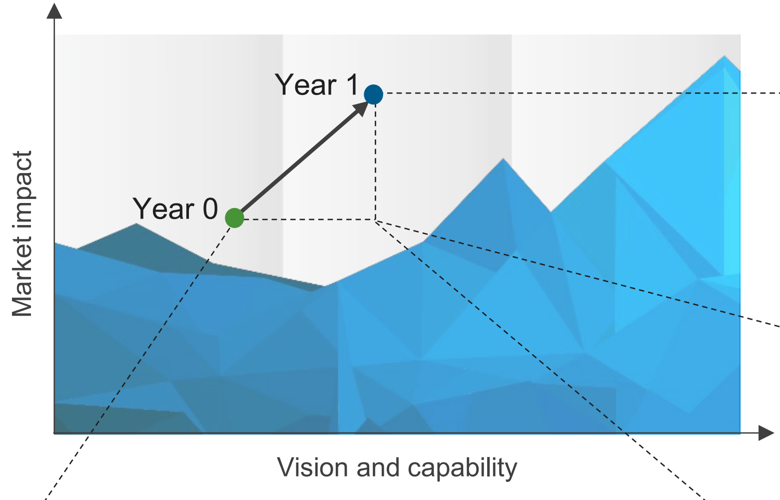
Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

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

Methodology

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



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances in vision and capability, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- Technology/domain-specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters

AND

- At least one area of top-quartile improvement performance in both market success and capability advancement

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

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

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

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

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

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

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

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

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

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

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

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

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

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