

Magic Quadrant for Supply Chain Planning Solutions

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Supply chain planning technology is needed to facilitate responsive, agile planning that supports a company's strategic goals. This Magic Quadrant will help supply chain technology leaders when evaluating and selecting the most suitable software vendor to mature their supply chain planning.

This Magic Quadrant is related to other research:

[Critical Capabilities for Supply Chain Planning Solutions](#)

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Additional Perspectives

- [Midmarket Context: Magic Quadrant for Supply Chain Planning Solutions](#)
(25 July 2023)

Market Definition/Description

Gartner defines a supply chain planning (SCP) solution as a platform that provides technological support to enable a company to manage, link, align, collaborate and share its planning data across an extended supply chain. An SCP solution supports planning, ranging from demand planning through to detailed supply-side response planning and from strategic planning through execution-level planning. It is the planning decision repository for a defined end-to-end supply chain. It is also the environment in which end-to-end-integrated supply chain decisions are managed. It establishes a single version of the truth for planning data and decisions, regardless of the underlying execution technology environment.

The foundational capabilities of an SCP solution are:

- Demand planning (such as demand forecasting and consensus demand planning)

- Supply planning (such as inventory planning, replenishment planning, order promising, production planning and production scheduling)
- Support for alignment of planning decisions across the enterprise and across multiple planning time horizons
- Support for financial impact analysis and planning

Optional capabilities of an SCP solution are:

- Advanced analytics and AI
- Digital supply chain twin
- Supply chain design and modeling
- Continuous planning
- Supply chain segmentation
- Multienterprise planning

SCP solutions are primarily deployed in a cloud using software-as-a-service (SaaS) models, but may also be delivered via a hosted model or installed on-premises.

Magic Quadrant

Magic Quadrant for Supply Chain Planning Solutions



Vendor Strengths and Cautions

Adexa

Adexa is a Niche Player in this Magic Quadrant. Its digital SCP solution is focused on delivering accurate end-to-end plans. Adexa's operations focus on North America, Western Europe and Asia/Pacific (including Japan), where it targets midsize and large enterprises in a range of industries, but with an emphasis on discrete manufacturing. Adexa's strategy for its SCP solution is to use machine learning (ML) techniques for self-correction of supply chain models, self-improvement of business rules and policies, and self-optimization of algorithms.

Strengths

- **Automation:** Adexa has a strong vision for automation, which extends to autonomous planning by using Adexa Genies (AI agents). Adexa's vision is to enable prescriptive automation for, among other things, alert tracking and interpretation, supplier behavior and policy selection. It designs Genies to learn from, and improve on, actions and decisions, rather than just repeat them.
- **Plan granularity and latency:** Adexa's vision includes planning at highly detailed levels by using detailed scheduling and strong attribute-based planning capabilities. To support this, it also has a strong vision for bringing very detailed, real-time data into the solution from sources such as manufacturing execution systems, warehouse management systems and transportation management systems.
- **Supply planning capabilities:** Adexa's solution displays strong capabilities in several areas, but especially for supply planning. The active use of attributes and the level of detail incorporated into plans also improves the ability to align planning decisions end-to-end, especially for short-term and midterm planning.

Cautions

- **Supply chain configuration:** Adexa's vision for capabilities to support supply chain configuration — in relation to supply chain segmentation and network design, for example — is limited. This may weaken the alignment of a company's short-term (sales and operations execution [S&OE]) and midterm (sales and operations planning [S&OP]) plans with its long-term strategic plans.

- **User experience:** Adexa has been upgrading the user interface extensively throughout its solution over the past three years, modernizing the look and feel and enhancing the visualization. But, as with all new developments, it will take some time for the new user experience to be fully deployed and matured. Also, although Adexa's overall vision for the user experience is above average, its focus on providing explainability of planning results to the end user could be stronger.
- **Third-party implementation services:** Adexa has fewer third-party implementation partners than other vendors in this Magic Quadrant. This restricts customers' choice of company to support them on their implementation journeys.

Anaplan

Anaplan is a Challenger in this Magic Quadrant. Its Connected Planning platform supports demand and supply planning, S&OP, and procurement planning functions, and aligns those with an enterprise's integrated planning goals as part of an extended planning and analysis (xP&A) approach. Its operations are geographically diversified and it supports enterprises in all industries covered in this Magic Quadrant. In December 2022, Anaplan announced the strategic acquisition of Vuealta's applications division, including its suite of purpose-built supply chain applications. In 2023, Anaplan will focus on four industry portfolios — consumer products/retail, manufacturing, high tech/media and communications, and financial and business services — influencing its strategy for industry-aligned solutions and for partner offerings and capabilities.

Strengths

- **User experience:** The Anaplan Connected Planning platform offers a harmonized user interface with configurable user screens and graphical layouts. It has an internal collaboration tool that enables users to address others within the platform through messaging. Its vision includes the use of natural language processing and natural language interface capabilities for intraplatform communication.
- **Platform extensibility:** Anaplan has one of the most extensible solutions in the market, largely driven by its no-code/low-code platform. Through its partner network, users have access to prepackaged extensions that can be added to the platform to support functional activities. Its PlanIQ and Google Vertex AI offerings enable self-service analytics capabilities. Through CloudWorks, users can connect to data sources, such as Amazon S3 and Google BigQuery.
- **Customer growth:** Year-over-year customer growth remains high. Anaplan has very high customer awareness — Gartner Peer Insights users name Anaplan as one of the most frequently considered vendors for SCP solutions.

Cautions

- **Planning decision automation:** While Anaplan has adequate support for the use of predictive analytics, its application of analytics to enable autonomous SCP decision making is limited, compared with other vendors in this Magic Quadrant. Its vision supports a guided resolution approach that requires some human intervention, but does not evolve to fully autonomous.
- **Data management:** Anaplan's support and short-term vision for data management is limited, compared with its peers. Its strategy for data cleansing and correction requires users to find and fix errors. Planned development in the short term includes capabilities to help users find and correct data anomalies and enrich user data with third-party-syndicated datasets.
- **Process management:** Anaplan users express more dissatisfaction with its process management than do users of other vendors in this Magic Quadrant. They identify complexity when setting up workflows and a lack of advanced workflow capabilities. However, Anaplan recently announced a visual workflow builder as a forthcoming feature.

Arkieva

Arkieva is a Visionary in this Magic Quadrant. Its focus is its Arkieva Orbit platform, which delivers a broad range of planning capabilities, from demand planning through detailed scheduling. Its operations are mainly focused in North America, Western Europe and Asia/Pacific (excluding Japan), where it targets mainly midsize and large enterprises in process-manufacturing, wholesale/distribution, retail and aftermarket industries. Its investment focus is on its new data studio capabilities and digital canvas architecture.

Strengths

- **Planning decision alignment:** Arkieva has a strong vision for aligning planning decisions, vertically and horizontally. This is demonstrated by its ability to allow plans to be telescopic in terms of time horizons, copied, compared financially and operationally, and analyzed at all levels of hierarchy.
- **Management of uncertainty and variability:** Arkieva's vision for managing uncertainty and variability throughout the supply chain is strong. It is supported by, among other things, an always-on digital supply chain able to self-monitor, self-learn and self-correct, with a view to ultimately creating a self-improving supply chain. Risk scores are assigned to each scenario that is generated, allowing for probabilistic planning approaches.

- **S&OE and execution visibility:** The Arkieva Orbit platform has strong S&OE and execution visibility capabilities, which are supported by machine-driven decisions based on real-time, event-driven updates. Arkieva provides a range of capabilities, from demand sensing and order promising to detailed scheduling, as well as visibility enablement through its supply chain command center.

Cautions

- **User experience:** Arkieva is weaker in terms of contextual collaboration and analytics transparency than other vendors in this Magic Quadrant. Its limited vision for cognitive computing and natural language processing and generation holds back its vision for the user experience by not removing the “black box” planning experience for users.
- **Geographic strategy:** Arkieva has offices in only four of the eight regions defined in this Magic Quadrant: North America, Western Europe, Eastern Europe and Asia/Pacific (excluding Japan). Combined with a low number of distributors globally, this weakens Arkieva’s overall geographic strategy.
- **Third-party implementation services:** Despite having grown its partner network over the past two years, Arkieva still has significantly fewer third-party implementation partners than other vendors in this Magic Quadrant. This leaves customers with fewer choices when it comes to available partners that can be used in their implementation journeys.

Blue Yonder

Blue Yonder is a Leader in this Magic Quadrant. Its Luminate Planning platform is focused on providing end-to-end multienterprise planning with a broad set of capabilities. Blue Yonder’s operations are geographically diversified, and it provides support to mainly large enterprises in all the industries covered in this Magic Quadrant. In 2022, Blue Yonder announced its intent to invest extensively in R&D over the next three years across its product portfolio. This investment will replatform all of Blue Yonder’s SCP capabilities onto a cloud-native, low-code platform.

Strengths

- **Decision alignment:** Blue Yonder's increased investment in R&D across its product portfolio reflects its vision for a tighter alignment of processes and decisions across planning time horizons and across the enterprise, further extending into tighter multienterprise planning alignment. Alignment across planning horizons includes a closed-loop feedback mechanism. Blue Yonder's vision for multienterprise planning is to have every process and subprocess configured together, and to measure process adherence.
- **Platform composability:** Blue Yonder is moving toward a comprehensive microservices architecture. Users will be able to break down a function into independent microservices that can then be composed into a workflow. Blue Yonder currently has over 200 SCP microservices available for use, combined with a published API catalog and an API gateway portal.
- **Capability coverage:** Blue Yonder has broad and deep capabilities to support the different layers of planning. Capabilities range from network design, inventory optimization and demand planning through to order promising and detailed scheduling.

Cautions

- **Pricing:** Blue Yonder continues to offer its SCP solution at a price premium, compared with other vendors in this Magic Quadrant. Additionally, its pricing model is less transparent than those of other vendors. Given Blue Yonder's current vast landscape of SCP products and applications, Gartner clients express frustration with having to try to understand which products are required to support their end-to-end SCP processes.
- **Digital supply chain twin:** Blue Yonder is evolving its Luminate Control Tower into a digital supply chain twin. However, its vision in this area lags behind that of other vendors in this Magic Quadrant with regard to how the model is derived — Blue Yonder relies more on a human-derived model than a fully data-derived model.
- **Service and support:** Blue Yonder's support for implementation services has grown more slowly than that of other vendors in this Magic Quadrant. Although product training is available, Blue Yonder does not have a standard certification program for end users. Creation of an SCP certification program for technical and process users could enable end users to be more self-sufficient.

Coupa

Coupa is a Challenger in this Magic Quadrant. With a focus on its Business Spend Management (BSM) platform, Coupa delivers capabilities that range from network design and optimization to demand planning, inventory optimization and production planning. Its operations are geographically diverse, and it supports midmarket and large enterprises across many industries. Coupa's investments focus on building scalable, integrated cloud solutions to support its customers' digital SCP needs by means of the digital supply chain twin, advances in AI and ML, big data and closed-loop intelligence.

Strengths

- **Planning decision automation:** Coupa has a strong vision for the automation of planning decisions. From data cleansing and AI bots that can run workflows, such as scenario generation and postgame analysis, to the ranking of opportunities and options, Coupa's BSM platform helps users focus on making higher-quality decisions, rather than performing repetitive tasks.
- **Configure functionality coverage:** With Coupa's focus on network design, optimization and long-term demand planning capabilities, it stands out in the configure layer of planning. This strength is supported by an ability to plan for a wide range of resource types, including environmental, social and governance (ESG) and workforce management.
- **Customer experience:** Coupa scores very highly for all customer experience subcriteria, largely on the basis of positive customer feedback, a strong tendency for customers to recommend Coupa, and good customer service and technical support.

Cautions

- **Vision for S&OE:** Coupa's vision for supporting S&OE processes is weaker than that of other vendors evaluated in this Magic Quadrant. Event management, order promising and detailed scheduling is not supported, as its roadmap is prioritized according to its customers' present needs.
- **User experience:** Although Coupa has a vision for one, harmonized user interface with configurable user screens, layouts, and plug-in predictive and prescriptive analytics, it is comparatively weaker on contextual collaboration, multidevice usage and providing explainability of planning results.

- **Deployment options:** Coupa's SCP cloud strategy is evolving in a cloud-first direction, but it currently still pursues a hybrid approach of platform and desktop integration. Only the desktop version can be deployed in a private cloud (such as on Google, Azure or Amazon Web Services [AWS]), and only Amazon Web Services (AWS) is fully available to its customers for deployment. Its Supplier Collaboration application is 100% cloud-based and supports AWS and Microsoft Azure.

Dassault Systèmes

Dassault Systèmes is a Visionary in this Magic Quadrant. Its main product supporting SCP is DELMIA Quintiq, which focuses on integrated planning across resource types, such as people, materials, machines and transportation. Its operations are mostly in North America, Europe and Asia/Pacific, and its clients tend to be midsize or large enterprises in process- and discrete-manufacturing industries. Its investments focus on further integrating and leveraging the Dassault suite of applications and using it to enhance visibility, thus increasing the quality of planning decision making.

Strengths

- **Capability breadth:** Dassault Systèmes has a strong vision for supporting the different layers of planning. This includes capabilities ranging from network design and inventory optimization through to order promising, detailed scheduling and broad execution visibility.
- **Modeling of constraints:** Dassault Systèmes is experienced in, and can handle, a great deal of complexity and many different types of constraints, and it can plan with these down to the level of production planning and detailed scheduling. It then uses its broad range of analytics to generate optimized plans through the different tiers of a supply chain.
- **Customer engagement and training:** The 3DS University offers standardized training programs and certifications to ensure end-user adoption. Furthermore, Dassault Systèmes has a highly structured and broad approach to engaging with customers, using various channels such as events, customer advisory boards, user communities, webinars and newsletters.

Cautions

- **User interface/experience:** Dassault Systèmes' vision for the user experience includes development of a modernized user interface, but it is struggling to provide a consistent user experience across applications. Elements such as contextual collaboration, the use of multiple devices to undertake planning, and the use of cognitive computing to enhance the user experience are all still in the early stages of development.
- **Capability coverage:** Despite Dassault Systèmes' strong vision for capabilities to support the different layers of planning decision-making, its current native, out-of-the-box coverage is below average, compared with its peers. Its platform has many capabilities, but several areas require major or minor configuration, or customization, to achieve the desired results.
- **Vendor implementation services:** In contrast to many of its peers in the SCP solution market, Dassault Systèmes has not grown its vendor implementation services in the past couple of years. Although it uses a growing number of certified third-party resources to support customer implementations, many end-user organizations prefer to also have the vendor directly involved.

e2open

e2open is a Visionary in this Magic Quadrant. Its SCP products focus broadly on integrated planning, with support for demand planning and supply network planning. Its operations are mainly in North America, Western Europe and Asia/Pacific, and its customers tend to be large enterprises in process- and discrete-manufacturing industries. Over the past two years, e2open has expanded its product portfolio to include multicarrier e-commerce, shipping and transportation management. This, in turn, has expanded its support for end-to-end supply chain management, from planning for demand through to product delivery.

Strengths

- **Management of uncertainty:** e2open is a pioneer of demand sensing and launched a supply-sensing application in late 2021. Supply sensing uses probabilistic methods to predict the likelihood of disruptions affecting supply plans and supply chain execution. These probabilistic methods are developed to incorporate risks and support autonomous decision making.

- **Tactical planning:** Through its Harmony platform, e2open users have end-to-end visibility across planning and execution, aided by real-time signals from the platform's execution systems that can inform short-term planning decisions. e2open's vision for the use of analytics further supports this direction, as it includes the use of deep reinforcement learning to test thousands of simulations and probabilities, and deep learning to find indirect correlations in data.
- **Customer engagement:** e2open's strategy for customer engagement includes hosting three user conferences each year and additional customer councils on specialized topics. These are designed to facilitate knowledge sharing among e2open users. Additionally, the e2open University offers e-learning and instructor-led training.

Cautions

- **Capability coverage:** Despite a solid vision for capabilities to support the different layers of SCP, e2open's current native, out-of-the-box coverage is below average, compared with its peers. Many things are possible using its platform, but areas such as production scheduling and network design are covered neither natively nor through partnerships.
- **Platform extensibility:** e2open's vision to support self-service analytics is lagging, compared with its peers. Currently, it prefers its customers to use embedded e2open analytics or to have systems integrator partners or third-party developers build analytics.
- **Marketing execution:** e2open's brand awareness in the SCP solution market is below average for vendors in this Magic Quadrant. It offers comparatively few marketing materials, such as webinars, case studies, videos and press releases. Additionally, in 2022, e2open experienced slower SCP customer growth than other vendors in this Magic Quadrant.

FuturMaster

FuturMaster is a Niche Player in this Magic Quadrant. Its Bloom Platform supports end-to-end SCP, with an emphasis on demand and replenishment planning. The company's operations mostly focus on Western Europe and Asia/Pacific, and its clients tend to be midsize and large enterprises in the food and beverage and consumer goods industries. Its strategy for its SCP solution is to use microservices and APIs in a cloud-native environment to enable its clients to address hypervolatility by planning at scale and closer to consumers.

Strengths

- **Decision support guidance:** FuturMaster has developed a Diagnostic-Predictive-Value framework designed to ensure that a client's strategy is well understood and integrated into the planning solution. This supports the building of a best-fit solution to maximize customer value.
- **Customer functional penetration:** FuturMaster customers report that they have a tendency to use its solution broadly to support their end-to-end SCP needs. This speaks positively for the overall viability of the solution.
- **Pricing:** FuturMaster offers a straightforward pricing model, based on the module(s) purchased and the type of users (full, collaborative or viewer). Furthermore, the cost of the solution tends to be lower than that of solutions offered by this vendor's peers, making it more affordable for customers.

Cautions

- **Data sources:** FuturMaster typically pulls data from customers' internal systems and data lakes, which may include some external data, but is still at an early phase when it comes to bringing a broad range of external data into its solution. The company is evaluating a number of partnerships to support this intention.
- **Geographic strategy:** FuturMaster is a relatively small company with a limited number of offices around the world. Additionally, its number of distributors is low; and even though it has a fair number of value-added resellers, its overall geographic strategy is below average for vendors in this Magic Quadrant.
- **Customer awareness:** FuturMaster is not as visible in the market as its peers and does not compete in technology selections. This may reflect its focus on primarily two industries (food and beverage, and consumer packaged goods [CPG]), which limits its visibility in other sectors.

GAINSystems

GAINSystems is a Niche Player in this Magic Quadrant. Its GAINS solution encompasses enterprise and multienterprise planning, including demand management, inventory optimization, supply planning and network design. Its operations are mostly focused in North America, Latin America, Europe and Australia. It focuses on enterprises in industrial manufacturing, defense and distribution-intensive industries such as distribution, retail and spare parts/maintenance, repair and operations. With the goal of providing access to advanced planning capabilities to inventory-intensive companies of different sizes, its investment strategy focuses on automating and augmenting planning decisions with ML and speeding up the planning decision-making process.

Strengths

- **Decision alignment:** GAINSystems' vision for decision alignment across an end-to-end multienterprise network and across all the layers of SCP is strong. To complement this, its vision also covers capabilities to support a very broad range of planning decision making, including an emphasis on advanced inventory optimization and a specific focus on the intersection of supply, demand and replenishment in distribution-intensive businesses.
- **Range of analytics:** GAINSystems' current state and vision for providing a range of analytics is very broad, and includes various aspects of heuristics, optimizations, simulations and ML. This gives users a solid range of choice when generating plans across the supply chain.
- **Customer experience:** GAINSystems' customers have communicated positive experiences with its customer service and support. GAINSystems also gets recognized for more tactical areas, such as selection engagement, contract negotiation and technical support.

Cautions

- **Composability:** GAINSystems' vision for connecting through the use of APIs is evolving positively, but its overall vision for composability related to microservices is less developed. In terms of extensibility, plug-in of analytics and user-defined/custom inputs to out-of-the-box models are supported, but customers have to rely on the GAINS lab if they want to build custom-made models. This makes these adjustments a more cumbersome task for end users.
- **Marketing execution:** Limited customer awareness has led fewer Gartner clients to include GAINSystems in SCP technology evaluations, which results in a below-average rating among the vendors in this Magic Quadrant.

- **Third-party implementation services:** GAINSystems has made the strategic choice to have a limited number of third-party implementation service partners. This limits customers' choice when it comes to implementation support.

ICRON

ICRON is a Niche Player in this Magic Quadrant. Its new ICRON Customer Centric Supply Chain Planning solution offers a broad range of planning capabilities, from demand planning through to detailed scheduling. Its operations focus mostly on Western Europe, Eastern Europe and Asia/Pacific, and its clients tend to be small and midsize organizations in industries such as chemicals, industrial manufacturing and consumer durables. Its investments focus on further developing its platform by using cloud capabilities and ensuring explainable decision-making support that embeds risk modeling/assessment in short-, mid- and long-range planning.

Strengths

- **Range of analytics:** ICRON's vision for the range of analytics includes heuristics, optimization, simulation and much more. For each of these categories, it aims to provide a broad range of options to ensure flexibility to handle different planning challenges.
- **Plan granularity and latency:** ICRON's vision includes planning at detailed levels by using order promising, detailed scheduling and strong attribute-based planning capabilities. In support of this, it also has a strong vision for bringing very detailed, real-time data and data streams into the platform.
- **Functional capabilities:** Across the 15 critical capabilities evaluated, ICRON scores above average in 10, and demonstrates no significant weak areas. Its best performance is within supply planning. It supports a broad range of resource types to plan with, extending beyond the traditional SCP field into areas such as finance and energy.

Cautions

- **User experience:** ICRON envisions a consistent and flexible user experience, but its vision could be stronger in areas such as contextual collaboration, provision of analytics transparency to planning results and cognitive computing (currently being explored).

- **Geographic strategy:** ICRON's number of offices, distributors and value-added resellers are all low, compared with other vendors in this Magic Quadrant. This may present challenges to large, global companies that want to deploy their SCP solution across many regions.
- **Implementation services:** ICRON's growth in internal implementation resources fell from 2020 to 2021, though it improved in 2022. Furthermore, ICRON has fewer third-party implementation partners than its peers, giving customers less choice of support for their implementation journeys.

John Galt Solutions

John Galt Solutions is a Leader in this Magic Quadrant. Its Atlas Planning Platform focuses on delivering a broad range of end-to-end planning capabilities, from strategic network modeling to production planning. Its operations are mainly focused in North America, Western Europe and Asia/Pacific, where it targets mainly midsize and large enterprises in process manufacturing, discrete manufacturing, and wholesale/distribution. Its investment focus is on improving the digital planning ecosystem of its customers through architectural improvements, convergence of finance, planning and execution, and user experience upgrades.

Strengths

- **Capability breadth:** John Galt Solutions has a strong vision for covering all planning time horizons with its own products and services or via partnerships. Its vision ranges from long-term supply chain modeling to the provision of predictive and prescriptive recommendations, while also providing real-time and streaming data for execution visibility.
- **Functional capabilities:** John Galt Solutions scores above average for 13 of the 15 critical capabilities, giving it a strong score overall for the functional capabilities of its solution. It scored significantly above average for basic demand-planning functionalities and process management capabilities.
- **Critical issue resolution and customer support:** John Galt Solutions receives strong customer feedback for customer support. This may be indicative of its similarly strong support for the resolution of critical issues, which end-user organizations value highly as their dependency on a SCP solution increases.

Cautions

- **Distribution and reseller strategy:** John Galt Solutions has fewer distributors and value-added resellers globally than most of the vendors in this Magic Quadrant. It has less coverage in regions such as Latin America, Eastern Europe, Middle East and North Africa, and Japan.
- **Implementation partners:** John Galt Solutions has fewer third-party implementation partners than other vendors in this Magic Quadrant and it lacks certification programs for the partners it does have. This limits the choice of certified partners for customers during their implementation journey.
- **Composability:** John Galt Solutions' vision for composability is weaker than that of other vendors in this Magic Quadrant. Although an API catalog exists, and an API portal can be accessed publicly by customers and partners, there is no structured developer network or marketplace.

Kinaxis

Kinaxis is a Leader in this Magic Quadrant. Its RapidResponse solution is focused on delivering concurrent planning across a broad range of SCP capabilities, from S&OP to production planning to execution. Kinaxis' operations are mostly focused in North America, Western Europe and Asia/Pacific, and its clients tend to be midsize and large enterprises in industries such as consumer electronics, industrial discrete manufacturing, pharmaceuticals and consumer products. Kinaxis' investment focus is on bringing in ML and big data capabilities through its Self-Healing Supply Chain and Planning.AI capabilities, enabling its ability to support operational decision making.

Strengths

- **Planning automation and alignment:** Kinaxis has a strong vision for supporting its customers' requirements for automating and aligning planning decisions from strategic through to operational planning layers, as well as for horizontal alignment, which extends to multienterprise planning. Automation is incorporated into many areas, from data aggregation and enrichment to automated scenario planning.
- **Management of uncertainty and variability:** Kinaxis has a strong vision for managing uncertainty and variability in relation to SCP. This is supported by its ability to consider demand and supply uncertainties by looking at a range of outcomes and allowing users to make trade-off decisions, depending on risks, rewards or costs — both financial and ESG-related.

- **Functional capabilities:** Kinaxis scored above average for 14 of the 15 critical capabilities. It scored at the very top for basic supply planning functionalities, solution extensibility, multienterprise planning capabilities, aligning decisions across time horizons and granularities, scenario management, user experience, and solution scalability and performance/speed.

Cautions

- **Geographic strategy:** Kinaxis has offices in only five of the eight regions covered in this Magic Quadrant, which is fewer than other vendors evaluated. However, its network of distributors and value-added resellers compensates for this.
- **Pricing:** Kinaxis' pricing level is above the average for vendors in this Magic Quadrant. Additionally, although Kinaxis has worked to simplify its pricing model with its Planning One offering, combined with a focus on value-based pricing and total cost of ownership, its pricing model is still based on a range of factors, including capabilities, users, and distribution and manufacturing sites.
- **Planning granularity:** Kinaxis' current planning granularity is weaker than that of other vendors evaluated in this Magic Quadrant. It currently lacks the native ability to plan sub-daily for functions such as production scheduling, but is bridging this gap by means of an extensive partnership strategy, while deepening the integration of its recent acquisition of MPO.

Logility

Logility is a Challenger in this Magic Quadrant. Its Logility Digital Supply Chain Platform is focused on providing end-to-end enterprise and multienterprise planning. Logility's operations are mainly focused in North America, Western Europe and Asia/Pacific, where it targets midsize and large enterprises in a range of manufacturing and retail sectors. In 2022, Logility announced the acquisition of Starboard, a supply chain network design software company. This acquisition complements the pre-existing features of Logility's solutions, while bolstering its supply chain modeling and design capabilities.

Strengths

- **Decision alignment:** Logility has a strong vision for providing planning support across strategic, tactical and operational time horizons, and is developing a governance and orchestration approach to align data across planning horizons for the different personas involved in an end-to-end planning process. It has a vision to automate multienterprise planning processes across planning phases and to align processes and decisions through granular reconciliation.

- **Functional capabilities:** Logility performs very well across different functional capabilities by utilizing its current solution. It does especially well in areas such as demand planning, supply planning and advanced planning, which includes multiechelon inventory optimization (MEIO) and network modeling.
- **Capability coverage:** Of the best-of-breed vendors, Logility has one of the most comprehensive portfolios of applications that support SCP. This enables its users to support S&OE, S&OP and integrated business planning (IBP) processes concurrently within the Logility Digital Supply Chain Platform.

Cautions

- **Global reach:** Logility has a smaller geographic footprint than other vendors in this Magic Quadrant, having consolidated physical offices into regional hubs as it implemented a hybrid work model after the COVID-19 pandemic. Furthermore, it does not use distribution partners as part of its network strategy and has a limited number of value-added resellers.
- **Scope of deployments:** Currently, Logility customers are slightly less likely to deploy at a companywide level. According to their reports, they are also less likely to have deployed Logility's platform as the sole SCP solution in their planning environment. However, since Logility plans to focus on enterprise accounts, this situation may change in future.
- **Cloud deployments:** Compared with most other vendors in this Magic Quadrant, Logility has a lower percentage of customers that have deployed their primary SCP solution in a cloud. It also has a lower percentage of on-premises customers that have migrated to cloud deployment models. Supporting its significant on-premises customer base, and/or transitioning them to the cloud version, risks diverting resources away from development of its cloud solution.

o9 Solutions

o9 Solutions is a Leader in this Magic Quadrant. Its o9 platform is broadly focused on planning capabilities across demand and supply. Its operations are mainly focused in North America, Western Europe, Eastern Europe and Asia/Pacific, and its clients tend to be large enterprises. It targets a range of process and discrete manufacturing industries and retail sectors. In 2022, it unveiled a building-block-based methodology designed to support shorter deployment timelines and improved implementation quality.

Strengths

- **Decision automation:** The o9 platform was purpose-built to enable automation of functional tasks and decisions. Its vision for the use of digital technologies like the Internet of Things (IoT), deep learning and graph technologies is strong. When applied to SCP, these digital technologies can automatically correct data, update business rules as business conditions change, create scenarios and prescribe recommendations to mitigate predicted disruptions.
- **Data sources and management:** A typical o9 instance can ingest internal data, partner data and third-party data signals. Users can also access o9's market knowledge hub, which houses time series data from several sources of public, syndicated and weather data. The o9 platform can also store unstructured data, such as social media posts and free text commentary, and then use natural language processing to help structure this data for use by planning teams.
- **Cloud strategy:** o9 Solutions has a cloud-agnostic strategy. Users can deploy the o9 platform in any private cloud environment or in hyperscale cloud environments offered by AWS, Microsoft (Azure), Google (Google Cloud Platform) and Samsung (Samsung Cloud). It offers both single-tenant and multitenant options.

Cautions

- **Global reach:** o9 Solutions has a more limited physical presence across the regions evaluated in this Magic Quadrant, especially with regard to sales, implementation and support, even though it experienced strong employee growth globally in the past year. It has developed a distribution network over the past few years, but currently lacks a value-added reseller strategy.
- **Subscription and services price:** o9 Solutions' subscriptions have above-average price points, compared with those of other vendors in this Magic Quadrant, for instances of similar scope and scale. This might be due to this vendor's focus on providing a lower total cost of ownership throughout the deployment life cycle. Also, it has a higher software-to-services ratio than most vendors, which means the cost of its services tends to be higher than that of services from other vendors in this Magic Quadrant.
- **Customer deployments:** o9's focus on supporting large enterprises' digital SCP initiatives contributes to a lower number of fully deployed instances, compared with other vendors in this Magic Quadrant. Also, its customer functional penetration is lower, as o9 customers are more likely to use the o9 platform alongside existing tools to support end-to-end SCP and to have deployed the platform at a divisional or regional level, rather than companywide.

OMP

OMP is a Leader in this Magic Quadrant. Its Unison Planning solution covers nearly all aspects of SCP, from network modeling through to detailed scheduling. Its operations are mostly focused in Europe and North America, and its clients tend to be large enterprises in process-manufacturing industries. OMP is investing heavily in capabilities to enable further scaling of the underlying architecture to absorb, among other things, more data and more users, as well as in broadening its use of ML, especially for supply planning.

Strengths

- **Capability breadth:** OMP has a strong vision to support all the layers of planning, from short-term to midterm and long-term planning, combined with a strong vision for enabling execution visibility. This is further complemented by a strong vision for planning beyond the individual enterprise, to enable end-to-end multienterprise planning.
- **Plan granularity and latency:** OMP's vision includes planning at very detailed levels by using its strong detailed scheduling capabilities and attribute-based planning. To support this vision, it also has a strong vision for bringing very detailed, real-time data and data streams into its platform from different sources.
- **Overall viability:** OMP reports strong financial results. Its users have a high tendency to use its solution as a single global reference for planning, which means they are more likely to continue investing in, and evolving, their OMP instance.

Cautions

- **Industry strategy:** OMP has a strong focus on process manufacturing industries, such as chemicals, pharmaceuticals and CPG, but much less focus on discrete-manufacturing and distribution-intensive industries. This can prove challenging for companies with a diverse product portfolio that requires considerable experience in several sectors.
- **Scalability:** OMP's vision for scalability is constrained by commercial limitations in terms of, for example, number of scenarios, the amount of historical data stored in the platform, and a maximum storage size for its 360-degree analytics capabilities. Although these limits are fairly high, they mean that the cost for customers may increase as they expand their use of the solution.
- **Price level:** OMP has a simple pricing model that prices by functionality and per user, but the overall price is typically high, compared with the prices charged by other vendors in this Magic Quadrant.

Oracle

Oracle is a Leader in this Magic Quadrant. Its Oracle Cloud Supply Chain Planning solution focuses on S&OP through demand management and supply network planning. Its operations are geographically diversified, and its clients tend to be midsize and large enterprises needing support for end-to-end supply chain management and manufacturing processes. Oracle is focusing its investments on leveraging its cloud technology expertise, enabling composability, smarter decision making through ML and other advanced capabilities, and building out industry-specific capabilities for a range of verticals.

Strengths

- **Planning decision automation:** Oracle has a strong vision for the automation of planning decisions for its customers. Oracle's Planning Advisor is instrumental in providing cause-and-effect visibility, and provides users with both predictive and prescriptive recommendations for demand and supply planning.
- **Planning granularity:** Oracle's vision for planning granularity is strong. With the ability to plan at any granularity, from years for S&OP to seconds for production scheduling, as well as with attributes at the item level and monetization at the aggregate level, Oracle's solution enables customers to plan at the required level.
- **Pricing:** The price of Oracle's solution is attractive, compared with the prices charged by other vendors in this Magic Quadrant. Additionally, its pricing model is very simple (being based on modules and number of users), which makes the selection process simpler and more transparent for users.

Cautions

- **User experience:** Oracle's vision for its next-generation user interface has not reached full maturity — significant development work lies ahead to implement it fully within the company's SCP solutions. While all the applications support configurable user screens, layouts and various tables, they currently lack a unified user experience.
- **Functional capabilities:** Oracle scored below average for 10 of the 15 critical capabilities. Its strongest showings were for data integration capabilities and planning decision automation, but it scored significantly lower than the average for user experience and advanced planning capabilities.
- **Deployment options:** Oracle's solution can be deployed in a private or public cloud, but is limited to Oracle Cloud Infrastructure (OCI), which can be challenging for customers with a preference for other hyperscale clouds.

QAD

QAD is a Niche Player in this Magic Quadrant. Its QAD Digital Supply Chain Planning (DSCP) solution mainly focuses on support for end-to-end SCP, covering aspects from demand planning and S&OP through to production and procurement planning. QAD's operations are geographically diversified. Its clients tend to be midsize organizations in process and subprocess manufacturing industries, but QAD has also deployed its solution for discrete-manufacturing and distribution-intensive companies. QAD's investments focus on proliferating its real-time digital data signals, which use the IoT to accelerate decision-making support.

Strengths

- **Range of resource types:** QAD's vision for a range of resource types is wide-ranging, covering traditional supply chain resources and extending to finance and ESG resources (such as energy, water and carbon). This benefits customers mature enough to take a broad range of factors into account when creating plans.
- **Geographic strategy:** QAD has offices in many regions and numerous distribution and reselling partners. This gives customers more choice when implementing its DSCP solution.
- **Pricing:** QAD has a simple pricing model, with only two components (modules and users). Additionally, its price level is lower than those of its peers, which makes its solution more affordable for organizations and increases the likelihood of them achieving a swift ROI.

Cautions

- **Range of analytics:** QAD offers various heuristics and optimization algorithms in its DSCP solution to help generate feasible plans, but is lacking in terms of vision for reinforcement ML and simulations.
- **Customer experience:** QAD performs below average for customer service and support, and for evaluation and contract negotiation. The same is true for "customer stickiness" (the tendency for customers to renew subscriptions and recommend the solution to others), which results in an overall customer experience below the average for vendors in this Magic Quadrant.
- **Deployment options:** QAD offers fewer deployment options than its peers. Its DSCP solution can currently only be deployed in the AWS Cloud, which may deter organizations that prefer to use other hyperscale clouds.

RELEX Solutions

RELEX Solutions is a Challenger in this Magic Quadrant. The RELEX Supply Chain & Retail Planning Platform supports integrated demand, inventory and supply planning. Its operations are mainly focused in Europe, followed by North America, and its clients tend to be midsize and large enterprises in the retail, grocery, and wholesale/distribution industries. RELEX is investing heavily in R&D, with a focus on exploiting the increasing availability and richness of data through the use of AI, while also looking to close the gap between S&OP and S&OE activities, especially for its CPG customers.

Strengths

- **Data sources:** RELEX's vision for data sources and data management includes using data from internal sources and third-party data providers to enable high-frequency data uploads for SCP. This will be very valuable in many areas, such as for replenishment of ultra-fresh items in stores and for event-driven allocations.
- **Range of analytics:** RELEX's vision covers a broad range of analytics types, such as heuristics, optimization and ML. This gives customers a good range of choices when creating demand and supply plans.
- **Customer experience:** RELEX customers have provided strong feedback about its customer service and support, as well as the evaluation and contract negotiation process. Additionally, they tend to stay with RELEX once they have engaged with it.

Cautions

- **User interface:** In 2022, RELEX acquired Formulate to strengthen its platform's promotional planning and analytics capabilities. However, RELEX's vision does not extend to full unification of the Formulate and RELEX Supply Chain & Retail Planning Platform user interfaces. Its vision focuses on achieving similar user experiences, while aligning experiences with the different personas (promotion planner and supply planner) who use the capabilities.
- **Industry strategy:** RELEX focuses largely on the retail sector. This results in less focus on a broad range of industries across process and discrete manufacturing than is the case with its peers in this Magic Quadrant. This may prove challenging for customers with highly diverse product portfolios and business units that cover several industries.

- **Pricing:** Pricing for RELEX's platform is based on the functionality deployed and the size and complexity of the business. The definition of complexity varies, based on the customer setup, which makes RELEX's pricing model slightly less transparent, but it aims to take into account the customer's specific use case. Additionally, RELEX prices its solution slightly above the average for vendors in this Magic Quadrant.

SAP

SAP is a Challenger in this Magic Quadrant. Its main SCP solution is SAP Integrated Business Planning (IBP), which supports demand planning, demand-driven material requirements planning, inventory, supply planning and S&OP. It is extended with solutions for scheduling and real-time order promising that are natively integrated. SAP is geographically diverse and targets midsize and large enterprises in all industries. In 2022, SAP announced the release of the SAP Business Technology Platform (BTP), which allows users to build low-code/no-code application extensions into SAP IBP.

Strengths

- **Global strategy:** SAP has one of the largest footprints of the vendors in this Magic Quadrant, with a global partner network comprising many distribution partners, value-added resellers and implementation partners across the eight regions. It also has the widest industry coverage, serving more of the industries covered in this Magic Quadrant than any other vendor, which gives it flexibility and enables it to provide broad support to customers.
- **Customer growth:** Year-over-year growth in the number of customers subscribing to SAP IBP is high. Gartner Peer Insights data shows that most SAP IBP customers deploy its tool to support demand planning, supply planning and S&OP. With its cloud-native platform, SAP IBP is an attractive option for both large and midmarket enterprises.
- **Capability coverage:** SAP has a broad portfolio of applications with the essential functional capabilities needed to support end-to-end SCP. It is continually investing in innovation to refine its SCP platform, so that it is easier for users to access and align all the relevant data needed to help with decision making in relation to planning.

Cautions

- **Decision automation:** SAP's vision for decision automation is functionally focused, envisaging, for example, automation of demand forecast generation and inventory safety stock setting; it has little vision for the application of automation across an end-to-end planning environment. Its vision for automation centers on ML. Adoption of other types of AI requires extensibility of the platform, namely using SAP BTP, which offers capabilities for no-code/low-code extensions with SAP Build.
- **S&OE support:** SAP's vision for supporting SCP in short-term time horizons is weaker than those of other vendors in this Magic Quadrant. It has a narrow vision for the use of execution-level data, relying mostly on signals contained in other SAP applications; this is something that companies with a diverse landscape of solutions (SAP and non-SAP) must be mindful of.
- **Customer enablement:** SAP offers standard training for a broad variety of audiences, but its certification program is directed toward consultants rather than customers. Gartner Peer Insights data shows that SAP IBP customers are less satisfied with the service and support they receive from SAP than are the customers of other vendors in this Magic Quadrant; it is important for potential customers of SAP to mitigate this potential risk.

Slimstock

Slimstock is a Niche Player in this Magic Quadrant. Its Slim4 product focuses on demand and replenishment planning, and inventory management. Slimstock's operations are mostly focused in Western Europe and North America. It provides support mainly to midsize enterprises in all industries covered in this Magic Quadrant. Its development efforts center on enhancing and expanding its capabilities in areas such as ML, network planning, capacity planning and scenario planning.

Strengths

- **Sales strategy:** Slimstock added a greater-than-average percentage of SCP customers to its client base over the past year. To achieve and support this growth, it substantially increased the number of employees supporting SCP (including sales, marketing and consulting).
- **Decision support management:** Slimstock's vision for decision support management includes a framework that guides customers wanting to become more decision-centric by helping to break down decisions into decision components. These components include quantitative and qualitative elements to determine where more automation can be applied, helping customers to achieve their automation goals.

- **Pricing:** Slimstock's pricing model for Slim4 is simple and transparent, being based on modules, users and locations. Furthermore, the solution is less expensive than those of other vendors in this Magic Quadrant.

Cautions

- **Range of resource types:** Although Slim4 supports core planning requirements for demand, supply, S&OP and financial planning, Slimstock's overall vision for planning a diverse set of resources is limited. Use cases focus on material constraints, spare parts planning and some logistics, containerization and financial planning. Unlike many vendors, Slimstock lacks the vision and ability to consider other areas, such as labor and work center constraints.
- **Digital supply chain twin strategy:** Slimstock has a more conservative digital supply chain twin vision than other vendors in this Magic Quadrant. Its vision covers elements of the supply chain twin definition (such as the use of real-time transactions and visualizations), but is limited in areas such as the use of probability distributions, derivation of a digital twin on the basis of data, and the use of a graph database to support modeling of configuration and correlations.
- **Customer awareness:** Slimstock has a strong focus on midsize businesses, but is not as visible in the market as its peers across the broad range of company sizes considered in this Magic Quadrant. It scored below the average for customer awareness, and features less often in customers' evaluations than other vendors in this Magic Quadrant.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

The following vendors were added to the Magic Quadrant because they had sufficient market momentum, as defined by Gartner in its SCP solution market momentum index (part of the inclusion criteria):

- FuturMaster

- ICRON
- QAD

Dropped

The following vendors no longer appear in the Magic Quadrant because they did not meet the inclusion criteria for market momentum:

- Blue Ridge
- Infor
- Manhattan Associates
- ToolsGroup
- Wolters Kluwer

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors had to meet three criteria:

1. All of the following SCP solution capabilities had to be commercially available (in general availability) as of 30 September 2022. Eligibility for initial consideration was determined by reviewing publicly available sources of information, including the vendor's website, for mentions of the following capabilities as part of a standard product offering:
 - **Demand planning:** Support for development of a consensus-driven demand plan that optimizes the balance between market opportunity and supply network capability.
 - **Supply planning:** Support for the translation of demand expectations into supply network requirements that orchestrate reliable, efficient delivery outcomes.
 - **End-to-end SCP:** Support for aligning horizontal and vertical planning decisions across the internal enterprise supply chain and into external trading partners.
 - **Financial impact analysis and planning:** Support for the ability to handle more and more of an organization's financial decisions within the SCP process, rather than outside it.

2. The vendor had to have an official office, branch or affiliate in at least three of the following eight regions considered for this market: North America, Latin America, Western Europe, Eastern Europe, Middle East and North Africa, Sub-Saharan Africa, Asia/Pacific (comprising Mature Asia/Pacific, Greater China, Emerging Asia/Pacific and Eurasia) and Japan. One of the three offices had to be in North America or Western Europe.
3. The vendor had to rank among the top 20 SCP solution providers according to the market momentum index defined by Gartner for this Magic Quadrant. Data inputs used to calculate relevancy included interest from Gartner clients, customer reviews and key vendor growth metrics.

Honorable Mentions

The following vendors with reasonably capable and, in some cases, strong SCP solutions did not qualify for inclusion in this Magic Quadrant. This does not mean that their solutions might not be viable alternatives for some customers. We limited participation in this Magic Quadrant to vendors that demonstrated current strengths in the market in several dimensions.

- **AIMMS** is a privately held vendor headquartered in the Netherlands. It delivers solutions for strategic and tactical supply chain scenario planning through to optimization modeling and application development, with the aim of overcoming complex supply chain challenges. Use-case areas include network design, S&OP and capacity planning. AIMMS did not meet the inclusion criterion for market momentum.
- **Blue Ridge** is a privately held vendor headquartered in the U.S. Its Blue Ridge Platform is mainly focused on demand planning, sensing and shaping, as well as capacity planning and inventory replenishment. Additionally, Blue Ridge offers price optimization functionality, following its acquisition of Prolific Virtue in 2019. Blue Ridge did not meet the inclusion criterion for market momentum.
- **Board International** is a privately held vendor co-headquartered in Switzerland and the U.S. It provides a business planning, decision support and analytics platform for areas such as SCP, financial planning, sales performance management and workforce performance management. Board's background is in the field of financial planning and analysis, from where it expanded into S&OP and SCP. Board did not meet the inclusion criterion for market momentum.

- **Flexis** is a privately held vendor headquartered in Germany. It has a background in the automotive industry and is using the resulting knowledge to create innovative supply chain solutions for highly complex discrete manufacturers covering areas such as S&OP, order slotting, order sequencing and transportation planning. Flexis did not meet the inclusion criterion for market momentum.
- **Infor** is a privately held vendor headquartered in the U.S. With a background in ERP, it has a large portfolio of applications, which include capabilities for SCP. It has a focus on complex manufacturing environments in process-manufacturing industry sectors, with an SCP solution that covers a very broad range of requirements. Infor did not meet the inclusion criterion for market momentum.
- **Manhattan Associates** is a publicly held company headquartered in the U.S. It has several solutions in its portfolio beyond SCP, such as warehouse management applications and transportation management applications. Its Manhattan Active Inventory product is mainly focused on demand, inventory, and replenishment planning, including allocation, with a primary focus on finished goods in the retail and distribution-intensive industries. Manhattan Associates did not meet the inclusion criterion for market momentum.
- **One Network Enterprises** is a privately held vendor headquartered in the U.S. Its applications span areas such as SCP and supply chain execution and visibility. Its SCP capabilities cover areas such as demand planning, S&OP, inventory optimization and supply planning through a single data model. One Network Enterprises did not meet the inclusion criterion for market momentum.
- **River Logic** is a U.S.-based, privately held software vendor. It offers a suite of packaged applications on its Digital Planning Twin SaaS platform, including a wide range of optimization solutions covering network design, cost to serve, supply chain and financial planning, and production planning and scheduling. River Logic did not meet the inclusion criterion for market momentum.
- **ToolsGroup** is a privately held software vendor headquartered in the U.S. Its solutions, Service Optimizer 99+ (SO99+) and Inventory Hub Dynamic Data Unification Platform, focus on dynamic demand, inventory and supply planning, and optimization. It uses an extensive number of AI/ML and probabilistic planning techniques to support a greater variety of planning functions and use cases. ToolsGroup did not meet the inclusion criterion for market momentum.

- **Wolters Kluwer** is a publicly listed company based in the Netherlands. Its CCH Tagetik portfolio has a background in corporate performance management, including financial planning and analysis, but the company emphasized its intention to move further into SCP with its acquisition of Vanguard Software in May 2021. Its CCH Tagetik SCP solution is primarily focused on probabilistic demand planning through supply network planning and S&OP. Wolters Kluwer did not meet the inclusion criterion for market momentum.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors on their ability to offer and support an SCP solution that enables customers to achieve the goals of their existing and future SCP processes. This evaluation covers:

- Features available in a vendor's portfolio of products that support SCP.
- Methods used by a vendor to help customers deploy, maintain and develop instances.
- Opportunities for a vendor's customers to be educated on, and to use, best practices and emerging practices for end-to-end SCP.

Vendors are also evaluated on how well their efforts to market and communicate their vision for their product resonate with the market. This is reflected in the:

- Number of customers using the current instance of the product.
- Tendency of customers to use a vendor's product to support a single global instance for planning.
- Likelihood that customers will extend their use of a vendor's product as they execute their strategies to move toward higher levels of SCP maturity.

As shown in the table below, the evaluation criteria for product or service, market responsiveness/record, customer experience and operations have high weightings. They represent the primary drivers for vendor selection among the Ability to Execute criteria. Buyers are most interested in product functionality, a vendor's tendency to carry out the vision set out in its roadmap, the level of satisfaction expressed by a vendor's customers, and how the vendor is able to operate effectively and efficiently during and after implementation.

The criteria for overall viability, sales execution/pricing and marketing execution receive medium weightings. These criteria assess the overall health of vendors, their ability to deliver software that will return a fast ROI at an affordable price, and their recognition in the market.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (May 2023)

Completeness of Vision

Gartner evaluates a vendor's Completeness of Vision by applying criteria that assess its:

- Ability to understand current market trends.
- Vision for how emerging technologies can help further the goals of SCP.
- Responses to customer needs and competitive forces — as Gartner views them.

Vendors are evaluated on their ability to articulate, to Gartner and to the market, a “statement of direction” for the next two to three years that matches (or surpasses) Gartner’s vision for the evolution of the SCP solution market. They should demonstrate understanding of the major technological and architectural shifts that will be required by this market, and be able to communicate a believable roadmap to exploit these and to deliver appropriate solutions.

The criteria for marketing understanding, marketing strategy, offering (product) strategy and innovation receive high weightings. These criteria assess how vendors demonstrate their vision for supporting a company’s digital SCP aspirations and how they envision planning will converge with cross-enterprise functions beyond the supply chain and extend into a multienterprise ecosystem. These criteria reveal the main differentiators of vendors in this market.

The criteria for sales strategy, business model, vertical/industry strategy (see Note 1) and geographic strategy receive medium weightings. These criteria strongly indicate vendors’ investment and growth strategies, including their vision for supporting customers across industries and geographies.

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (May 2023)

Quadrant Descriptions

Leaders

Leaders demonstrate strong vision and execution capabilities for SCP solutions. They have broad, deep and differentiated functionality that addresses a broad range of user requirements. Their coverage of the main categories of planning capability – configure, optimize, respond and execution visibility (see Note 2) – is good enough, with a good balance across today's categories and/or those planned for the future.

Leaders have a reasonable range of features to support organizations' maturity journeys. Their visions for supporting a Level 5 maturity planning environment align well with Gartner's vision. Leaders anticipate where customer demands and markets are moving, and clearly identify how innovative technologies can be applied to planning applications. They have strategies to support emerging requirements to build future-proof SCP solutions that focus on enabling both high-quality decision making and achieving a high degree of user adoption. Because Leaders are typically well-established in leading-edge, complex user environments, they benefit from user communities that help them remain at the forefront of emerging needs and innovation.

Leaders exhibit strong financial performance and viability with their SCP solutions. Leaders generally have good market penetration, as well as broad functional penetration of their customers. Many customers have deployed a single instance of a Leader's SCP software that supports large planning models and a high degree of supply chain complexity.

Challengers

Challengers exhibit strong execution capabilities at present, but their product roadmaps are not closely aligned with Gartner's view of the future of SCP solutions. They typically have a consistent track record of successful implementations. They provide good support for enabling a Level 3 maturity SCP process, and their software tends to be used as a single global instance for planning. Their product features and technical capabilities are sufficient to support Level 3 maturity planning, but other aspects of their offering are still maturing. Their understanding of SCP market trends and how to apply innovative technologies to SCP is lagging, which may make it challenging for SCP processes to advance to higher levels of maturity. Customers are usually satisfied with Challengers and get reasonable to good value from these vendors' solutions across their supply chains.

Challengers are preferred by buyers that prioritize Ability to Execute over Completeness of Vision. One of these vendors may be favored if its SCP solution is part of an enterprise's incumbent product or if they have some other preexisting relationship. Challengers have demonstrated long-term viability, with sound financial results and stable products. The customer experience they provide is sufficient, with customers having resources available to manage and sustain their instance on their own with little support needed from the vendor.

Prospective buyers should evaluate Challengers based on these vendors' current capabilities and gaps, and determine the extent to which any shortcomings will impede short-term aspirations to higher levels of maturity.

Visionaries

Visionaries articulate a strong vision for their SCP solutions. Their product roadmaps demonstrate a good balance between their understanding of where users' SCP solution requirements are heading and the intended use of key technological developments to help support those requirements.

Visionaries are often thought leaders in one or more key characteristics of SCP technology environments (for example, digital supply chain twin, multienterprise planning and AI), and their management teams prioritize development of advanced SCP capabilities. They have compelling product strategies, but may have current functional gaps in their SCP solution, lack live customers, have less recognition in the market or be in relatively weaker financial positions. They may have developed depth in a specific functional area (such as detailed scheduling or inventory optimization), but not yet have enough depth in other capability areas. Alternatively, they may have developed a highly innovative product whose users are not yet mature enough to derive full value from it.

Niche Players

Although there might be an assumption that vendors in the other quadrants are better choices for new SCP solution buyers, in certain circumstances, a Niche Player can be as good a choice as, or even a better choice than, a Leader, Challenger or Visionary for prospective users. This is because a Niche Player might focus on a specific geography or industry relevant to the customer and therefore have capabilities and offerings tailored to support it.

Niche Players are often seen as specialists — they are frequently used as suppliers of point solutions to support one or two aspects of SCP, such as demand forecasting, inventory planning and S&OP — but may also be used more broadly. Organizations may use a Niche Player's solution in conjunction with SCP solutions from other vendors to fulfill end-to-end SCP needs.

Context

Several years ago, Gartner identified a shift in SCP buyers' behavior. This shift was from investing in best-of-breed solutions for functional SCP activities to evaluating vendors' abilities to support SCP processes holistically by providing integrated end-to-end planning capabilities.

Generally, companies aim to invest in a product that will help them advance to higher levels of SCP maturity and to scale as their planning needs evolve. Some companies still evaluate SCP solutions for specific functional needs, like demand planning or sales and operations planning, with the intention of using a planning tool's additional features over time. In the past, these functional needs may have been fulfilled within a heterogeneous SCP application landscape. However, companies found it challenging to support a process that gave them the required visibility across the enterprise and across planning time horizons. Consequently, SCP solutions evolved into a unified data model environment where a single model of the supply chain is used for planning. Hence, buyers have become more inclined to engage with a single vendor that provides an SCP suite that covers most, if not all, of their SCP technology needs.

The trend toward one unified platform continues. However, the focus is again starting to shift in the direction of more flexibility and choice for customers when it comes to planning, so that they are not locked into using only the capabilities of a single technology provider. This shift is prompting vendors to open up their platforms by allowing organizations to develop and embed specific algorithms in them — or to source algorithms from third parties — while also focusing on governance, flexibility and the user experience. It is still early days in this regard, but this is the direction in which the SCP technology market is moving.

Recommendations

Supply chain technology leaders and SCP leaders looking to invest wisely in SCP technology should:

- Get clarity on their business strategy. What are the key factors to consider for the supply chain?
- Link the business strategy to the supply chain and SCP strategy. What does the SCP capability need to deliver to generate the required business value?
- Identify the current (“as is”) maturity level for the relevant SCP processes (for example, S&OP, demand planning and supply planning).
- Define the desired (“to be”) maturity level for the relevant SCP processes to support the business strategy. It can be helpful to phase the journey to the to-be state to allow sufficient time to stabilize the planning environment between the phases of the journey.
- Construct an overall SCP technology vision and roadmap with a view to filling any gaps.
- Identify suitable technology options in support of current and future capability requirements. Use this Magic Quadrant and [Critical Capabilities for Supply Chain Planning Solutions](#) when considering your options to support the SCP maturity journey. Also ask Gartner analysts to guide you through the selection process.

Market Overview

The SCP market was worth \$6.4 billion in 2022 and is forecast by Gartner to exceed \$11.4 billion through 2027 — a compound annual growth rate (CAGR) of 12.8% (in constant-currency terms). This market includes a large array of planning solutions, ranging from products that provide foundational planning capabilities through to those that enable business differentiation and innovation.

SCP capabilities grew in importance to many companies in the early stages of the COVID-19 pandemic. Subsequently, the supply chain challenges that spanned the world in 2021 and 2022 underlined the need for comprehensive and restructured supply chain planning processes. This has led companies to prioritize investments in technology solutions that can enable and manage these processes.

The crowded SCP solution market includes everything from large, long-standing technology vendors to smaller, privately funded software vendors. Many of its more established vendors began as specialist providers focused on a few aspects of planning, such as inventory planning, production planning and scheduling, or S&OP. They have since extended their reach into multiple disciplines of SCP through in-house development or acquisitions. New entrants typically come from the worlds of big data and AI, which mainly focus on short-term planning to fill use-case-specific gaps in incumbent SCP solutions and achieve a fast ROI. This is prompting traditional SCP solution providers to embed more advanced capabilities in their solutions, such as AI/ML, cognitive computing and support for big data.

This Magic Quadrant is a multiregional analysis oriented toward Gartner's clients in North America and Western Europe. The SCP solution vendors featured in this Magic Quadrant are evaluated, among other things, on their ability to sell to multinational organizations based in North America, Western Europe and beyond.

Evidence

Information used to create the inclusion criteria, market definition and vendor evaluations in this Magic Quadrant came from many sources:

- Interactions between Gartner analysts and hundreds of end-user clients during 2021 and 2022 regarding their SCP solution initiatives.
- Interactions with SCP solution vendors during 2021 and 2022.
- Verified customer feedback shared on Gartner's Peer Insights platform in 2021 and 2022.
- Responses by vendors that met the inclusion criteria for this Magic Quadrant to a standard vendor survey with questions on topics such as geographical coverage, industry coverage, strategies and roadmaps.
- Responses by vendors that met the inclusion criteria for this Magic Quadrant to a standard SCP solution RFP, which included more than 500 detailed questions. Each RFP response was weighted based on Gartner's view of its importance to an SCP solution and was compared with a Gartner SCP solution RFP standard.
- Recorded presentations by vendors that met the inclusion criteria for this Magic Quadrant. These contained detailed information on 18 key, predetermined SCP solution areas.

- Recordings of live demonstrations of current offerings by vendors that met the inclusion criteria for this Magic Quadrant. Gartner analysts had, in advance, provided the vendors with four workflow scripts to demonstrate.
- A live question-and-answer session in which vendors that met the inclusion criteria for this Magic Quadrant answered questions about the data they submitted and performed live, on-demand demonstrations.
- Financial data from the S&P Capital IQ platform for the public companies evaluated. For the private companies, financial data was provided by the vendors. Financial data was scored using Gartner's financial model (see [Understanding the Methodology Behind Gartner's Financial Statement Scorecard for Public Companies](#)).

Note 1: Vertical/Industry Strategy Criterion

The vertical/industry strategy criterion examines a vendor's strategy to direct resources, skills and offerings to meet the needs of individual vertical markets. Key for SCP solutions is a focus on three industry groups:

- Process manufacturing:
 - Consumer goods
 - Food and beverage
 - Pharmaceuticals
 - Paper and pulp
 - Oil and gas
 - Metals
 - Chemicals

- Discrete manufacturing:
 - Automotive
 - Industrial manufacturing
 - High tech/electronics
 - Aerospace and defense
 - Mining and construction
 - Medical devices
 - Footwear/apparel
 - Consumer durables
- Distribution-intensive:
 - Telco/utilities
 - Aftermarket
 - Retail
 - Retail (excluding grocery)
 - Wholesale/distribution

Note 2: SCP Configure, Optimize, Respond and Execution Visibility (CORE) Model

Gartner recognizes three major categories of planning functionality in relation to about 60 discernible solution types:

1. Some solutions can help to *configure*, or design the supply chain (for example, in terms of an appropriate supply chain segmentation strategy or postponement strategy).
2. Some solutions can *optimize* the supply chain (for example, by helping to create an optimal plan using constrained resources).

3. Some solutions can find out how to *respond* when execution does not happen according to the optimal plan (for example, via customer order prioritization for Class A customers when a supply delivery is compromised). To respond effectively, an SCP solution must also be able to see what is happening in terms of near-real-time execution.

Gartner's CORE model takes its name from those three major categories and from the requirement for execution visibility:

- **C = Configure:** Decide the configuration or design of the supply chain to achieve the company's goals by enabling the supply chain strategy.
- **O = Optimize:** Create optimal demand and supply plans, taking account of any constrained resources.
- **R = Respond:** Create intelligent responses to execution events that keep the short-term plan as close as possible to what is needed to achieve the company's goals.
- **E = Execution Visibility:** Ensure that the planning capability has the right level of visibility into relevant demand- and supply-side execution events.

Traditional planning solutions tend to focus strongly on the "optimize" category. However, over time, a company will need to rebalance its planning capabilities more evenly across all the categories. Therefore, it is important — particularly when thinking about future SCP requirements — to consider this rebalancing in any technology-related roadmaps.

For further information on the CORE model, see [Getting Ready for the Digital Future: Strengthen Your Supply Chain Planning CORE](#).

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Document Revision History

[Magic Quadrant for Supply Chain Planning Solutions - 16 May 2022](#)

[Magic Quadrant for Supply Chain Planning Solutions - 22 February 2021](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[How Markets and Vendors Are Evaluated in Gartner Magic Quadrants](#)

[Critical Capabilities for Supply Chain Planning Solutions](#)

[10 Steps to Select Supply Chain Planning Technology Effectively](#)

[Implementation Best Practices for Supply Chain Planning Solutions, Part 1 — Initiation](#)

[Implementation Best Practices for Supply Chain Planning Solutions, Part 2 — Planning and Execution](#)

[Supply Chain Score for Planning](#)

[E2E Supply Chain Ecosystem Collaboration: Part 3 — 11 Elements for Level 5 Supply Chain Maturity](#)

[Prepare Your Supply Chain Planning for the Digitized Future With These 3 Proven Concepts](#)

[SCM Application Architecture Scenarios, 2025: 3 Ways to Win](#)

[Forecast: Enterprise Application Software, Worldwide, 2021-2027, 1Q23 Update](#)

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Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (May 2023)

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (May 2023)