

HORIZONS REPORT

# Intelligent Supply Chain Services, 2025

**Enabled by interoperability, resilience, and adaptability**

**Authors:**

Ashish Chaturvedi, Executive Research Leader  
Krupa KS, Senior Analyst

Excerpt for EY

“

Today's supply chains can't afford to work in the old, distorted, siloed, and linear manner. They're facing the brunt of fluctuating tariffs, trade volatility, and quickly changing macro-economic policies. The only way out for enterprises is to build interoperable, resilient, and endlessly adaptive supply networks that can sense, respond, and evolve in real-time.

”



**Ashish Chaturvedi**

Executive Research Leader, HFS Research

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# Introduction to HFS Horizons: Intelligent supply chain services, 2025

Welcome to our "**HFS Horizons: Intelligent supply chain services, 2025**" study. Horizons are HFS Research's [vendor evaluation research vehicle](#) designed to assess the **innovation and value potential** of provider capabilities across three distinct horizons:

## Horizon 1

Ability to digitally optimize functional supply chain operations by driving cost reduction, process automation, and responsiveness to disruption

Leveraging advanced technologies such as generative AI (GenAI), digital twins, and control towers to enable task-level automation and early-stage platform integration

For e.g., AI-driven supply planning or automated warehouse slotting based on real-time data

## Horizon 2

Horizon 1 + the ability to enable adaptive, cross-functional, and end-to-end supply chains that respond to volatility and stakeholder needs with agility

Embraces the "OneOffice" mindset while integrating predictive analytics, sustainability data, and real-time orchestration across sourcing, logistics, and fulfillment

For e.g., dynamic fulfillment models and adaptive supplier engagement based on scenario simulations

## Horizon 3

Horizon 2 + the ability to reimagine supply chains as intelligent, interoperable, and collaborative ecosystems with built-in resilience and sustainability

Enabled through the "OneEcosystem" approach, with AI-powered platforms that foster co-creation, data federation, and autonomous execution across partners and functions

For e.g., self-healing supply networks using AI agents, shared demand signals, and circularity intelligence

This research evaluates how service providers help enterprise clients embrace innovation and realize value. It examines their capabilities across the [supply chain value chain](#) based on a range of dimensions to understand the **why, what, how, and so what** of their service offerings.

## Inclusion criteria

We invited diversified consulting, IT, business, and managed service providers with an established supply chain services-focused business line to participate in this study.

Participation guidelines include:



### Revenue

Annual revenue of \$250 million from supply chain services or a 10%+ contribution from supply chain services to their annual revenues



### Services

An existing portfolio of industry-specific services that coincide (partially or completely), spanning HFS's [supply chain value chain](#)

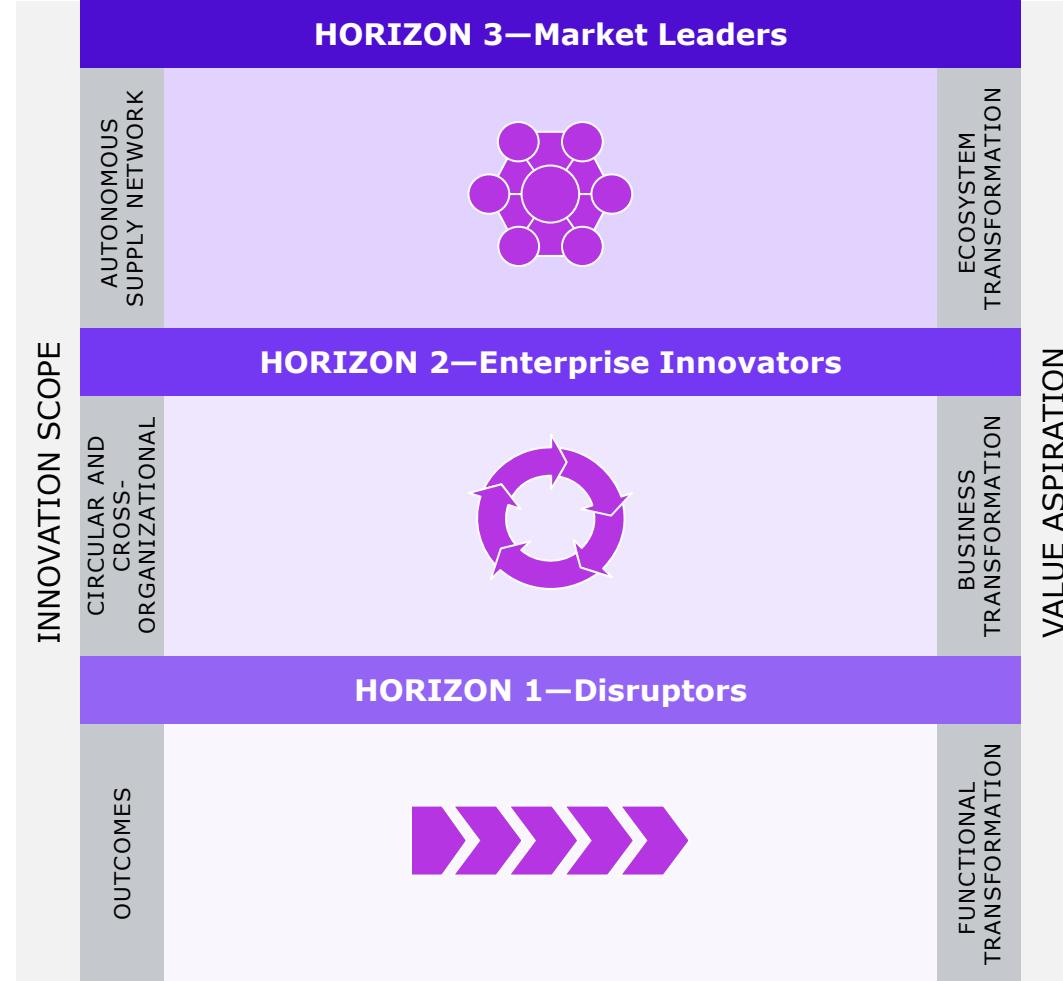
# 1

# Introduction and the HFS supply chain services value chain

# HFS's value chain spanning supply chain services

|   |  |   |   |  |   |   |  | Consulting Services   | IT Services                                | Business Services                                       | Managed Services  |  |  |  |  |
|---|--|---|---|--|---|---|--|---|--|---|---|--|--|--|--|
| Supplier collaboration  |  | Real-time planning  |   | Smart warehousing  |   | Post-sale service orchestration                           |  | Automated procurement   |  | Cognitive logistics                                     |   | Last-mile visibility   |  | Circularity and returns                            |  |
| Multi-tier supplier visibility, co-innovation, ESG compliance tracking  |  | Demand sensing, scenario simulation, inventory optimization         |   | Warehouse automation, inventory synchronization, robotics integration        |   | Returns management, reverse logistics, support automation |  | Supply network design, supplier risk, and compliance advisory | SRM platforms, blockchain for traceability | IBP and S&OP transformation strategy                    | Digital twins, control towers, predictive analytics engines | Warehouse strategy, space utilization, automation ROI analysis | WMS deployment, IoT integration, robotics software | Service lifecycle optimization advisory            | CRM integration, service workflow engines                          |
| Supplier onboarding, document verification                              | Supplier performance monitoring, compliance audits | Planning data cleansing and enrichment                              | Inventory policy execution, forecast monitoring | Labor planning, fulfillment coordination                                     | Facility operations, asset maintenance, SLA-based performance | Returns processing, RMA management                        | Warranty service management, customer SLAs | Procurement transformation roadmaps                           | eProcurement tools, AI-driven sourcing     | Logistics network redesign, risk modeling               | TMS, route optimizers, real-time tracking tech              | CX journey mapping, logistics risk assessment                  | Real-time tracking APIs, ETA algorithms            | Circular supply chain consulting                   | Product intelligence systems, IoT tracking for lifecycle analytics |
| Touchless buying, contract lifecycle automation, compliance enforcement |  | AI-based route optimization, freight cost modeling, carbon tracking |   | Dynamic delivery updates, customer experience enhancement, disruption alerts |   | Customer service support, issue resolution                | Delivery SLA assurance, NPS tracking       | Catalog management, invoice reconciliation                    | Spend analytics, contract management       | Freight audit and payment, carrier performance tracking | Freight operations, compliance with trade and customs       |  |  | Return logistics, refurbishment process management | Reverse supply chain-as-a-service                                  |

# HFS Horizons: Intelligent supply chain services, 2025 – aligning enterprise objectives with service provider value



## Horizon 3 – Interoperable, intelligent, and purpose-led supply networks

**Service providers demonstrate Horizon 2 capabilities plus:**

- The ability to realize the vision of intelligent, interoperable, and connected supply networks
- Lead the systemic transformation of supply chains through technologies such as AI, data platforms, and digital twins
- Market-shaping investments in interoperable architectures, proprietary IP, and sustainable innovation frameworks
- Engage in purpose-led transformation projects influencing policy, industry benchmarks, and social impact
- Recognized as thought leaders creating value through connected ecosystems and adaptive operations

## Horizon 2 – Adaptive, sustainable, and intra-enterprise supply chains

**Service providers demonstrate Horizon 1 capabilities plus:**

- Proficiency in orchestrating cross-functional (across planning, procurement, logistics, and returns) and intra-enterprise integration (marketing, supply chain, finance)
- Strong client references for collaborative innovation and business value delivery
- Output/value-based partnerships with clients and ecosystem partners, moving beyond transactional models
- Embedded focus on stakeholder experience and responsiveness to disruption

## Horizon 1 – Digitally optimized and operationally resilient supply chains

**Service providers demonstrate:**

- The ability to optimize discrete supply chain functions for cost efficiency, speed, and accuracy
- Functional transformation enabled by emerging analytics, control towers, and responsive workflows
- A clear go-to-market strategy focused on operational resilience and value realization
- Emerging narratives around sustainability and risk mitigation
- Predominantly effort-based, SLA-driven client relationships with limited business model innovation

# Major themes – Intelligent supply chain services, 2025

## Interoperability in supply chains

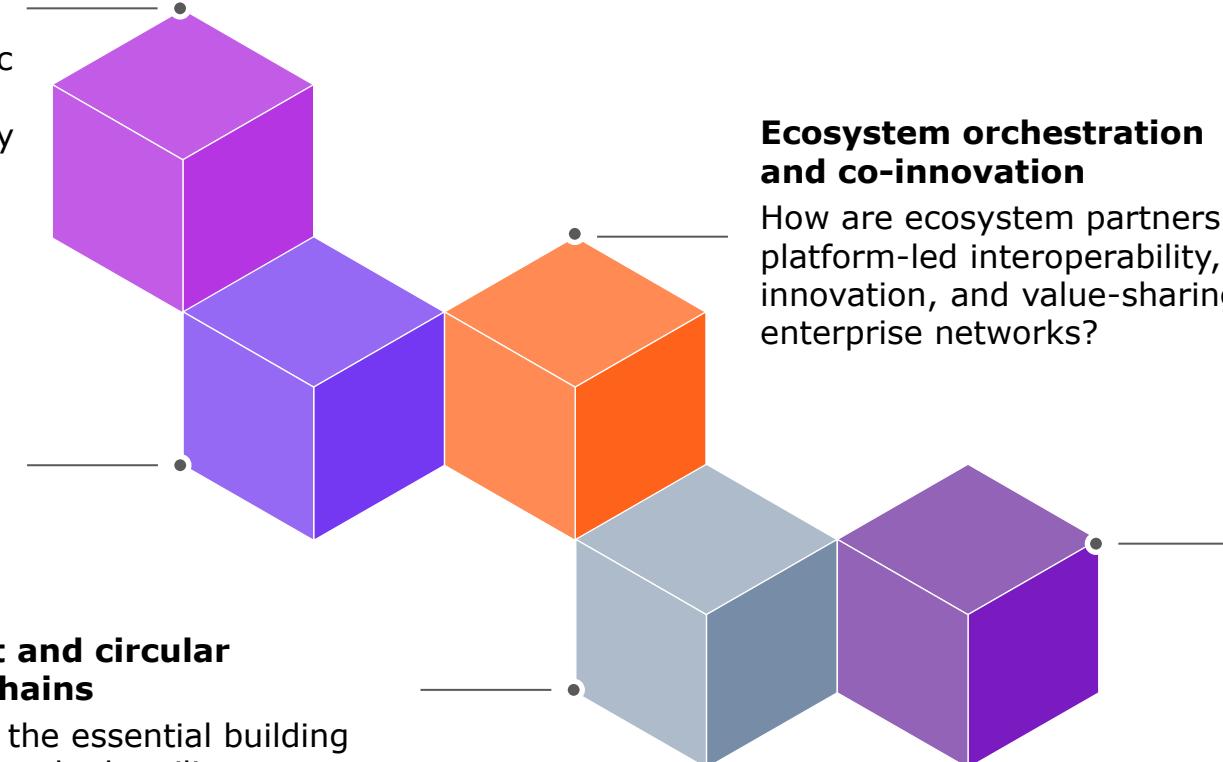
How are traditional AI/ML, agentic AI, GenAI, and cloud-native platforms enabling interoperability and end-to-end visibility across dynamic supply networks?

## Adaptive operating models

How are services and delivery models evolving to support agile, cross-functional, and domain-integrated supply chain execution?

## Resilient and circular supply chains

What are the essential building blocks to embed resilience engineering and circularity in design while navigating disruption and meeting sustainability goals?



## Ecosystem orchestration and co-innovation

How are ecosystem partnerships enabling platform-led interoperability, collaborative innovation, and value-sharing across multi-enterprise networks?

## Outcome-driven, purpose-led transformations

How are providers driving measurable business outcomes, from cost to carbon, by integrating technology, talent, and trust into every node of the supply chain?

# 2

## Research methodology

# Sources of data

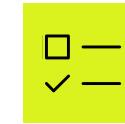
This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on the service capabilities of the participating organizations covered in our study. Sources are as follows:



## Briefings and information gathering

HFS conducted detailed **briefings** with customers of each supply chain provider.

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



## Reference checks

We conducted reference checks with **21 active clients and 24 active partners** of the study participants via survey-based and telephone interviews.



## HFS Pulse

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions.

For this study, we leveraged our fresh-from-the-field HFS Pulse study data featuring **305 enterprise leaders**



## Other data sources

**Public information** such as news releases and websites.

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

# Horizons assessment methodology – Intelligent supply chain services, 2025

The “**HFS Horizons – Intelligent Supply Chain Services, 2025**” research evaluates the capabilities of service providers across a range of dimensions to understand the ***why, what, how, and so what*** of their service offerings supporting supply chains. Our assessment will be based on inputs from clients and partners, augmented by analyst perspectives. The following illustrates how we assess their capabilities:

| Distinguishing service provider characteristics                  |  |  |   |  |
|--|--|--|---|--|
| Assessment dimension (weightage)                                 | Description  | Horizon 1 service providers  | Horizon 2 service providers   | Horizon 3 service providers  |
| <b>Value proposition: The Why?</b><br>(25%)                      | <ul style="list-style-type: none"> <li>Strategy and vision for modern, connected supply chain services</li> <li>Supply chain offerings that address real-time adaptability, ecosystem collaboration, and regulatory risk (e.g., tariffs, ESG compliance)</li> <li>Competitive differentiators that enable platform integration and resilience</li> </ul>   | <ul style="list-style-type: none"> <li>Ability to drive functional digital transformation by delivering cost, speed, and basic responsiveness benefits</li> <li>Incremental platform adoption to support digital visibility</li> </ul>                               | Horizon 1 + <ul style="list-style-type: none"> <li>Driving interoperable, adaptive supply chains with sustainability, traceability, and customer-centricity in mind</li> <li>Enhancing value prop via predictive analytics, stakeholder experience, and supply chain circularity</li> </ul>           | Horizon 2 + <ul style="list-style-type: none"> <li>Visionary strategy for future-ready, networked supply ecosystems</li> <li>Orchestrating autonomous, self-learning, and resilient platforms amid global disruption and compliance complexity</li> </ul>  |
| <b>Execution and innovation capabilities: The What?</b><br>(25%) | <ul style="list-style-type: none"> <li>Breadth of tech, business, consulting, and managed services across the value chain</li> <li>Differentiation through real-time scenario handling, circularity, risk sensing, and automation at scale</li> <li>Depth of talent, delivery model, and industry adoption</li> <li>Focus on resilient architectures, digital twins, and use of AI agents</li> </ul> | <ul style="list-style-type: none"> <li>Focused execution in key supply chain areas</li> <li>Technical capabilities rooted in labor efficiency</li> <li>Early-stage control towers, IoT, or platform enablement</li> <li>Emerging sustainability narrative</li> </ul> | Horizon 1 + <ul style="list-style-type: none"> <li>E2E delivery of adaptive services (planning to returns)</li> <li>Global talent base, clear innovation roadmap</li> <li>Strong partnerships in data, cloud, and ESG</li> <li>AI/ML used for continuous planning and disruption detection</li> </ul> | Horizon 2 + <ul style="list-style-type: none"> <li>Autonomous decisioning, platform-native workflows</li> <li>Ecosystem-led innovation at scale</li> <li>Integrated offerings across consulting, IT, business, and managed services</li> <li>Ability to recode operations amid crises like trade conflicts, pandemics, and climate shocks</li> </ul> |
| <b>Go-to-market strategy: The How?</b><br>(25%)                  | <ul style="list-style-type: none"> <li>Nature of investments (platforms, R&amp;D, AI)</li> <li>Co-innovation with customers and hyperscalers</li> <li>Commercial agility and risk-sharing models</li> </ul>  | <ul style="list-style-type: none"> <li>Established go-to-market (GTM) strategy rooted in effort-based engagement</li> <li>Transactional programs with low orchestration complexity</li> </ul>  | Horizon 1 + <ul style="list-style-type: none"> <li>Supply chain-specific GTM with adaptive solutioning</li> <li>Data-led stakeholder engagement</li> <li>Outcomes tied to sustainability, risk, and agility KPIs</li> </ul>   | Horizon 2+ <ul style="list-style-type: none"> <li>Investments in resilience playbooks, platform partnerships, and agentic automation</li> <li>Market-making and co-creation hubs with partners</li> <li>GTM focused on value creation despite disruption, supported by dynamic pricing/commercial models</li> </ul>                                  |
| <b>Market impact: The So What?</b><br>(25%)                      | <ul style="list-style-type: none"> <li>Scale of services across sectors and geographies</li> <li>Ability to drive real-world outcomes across cost, agility, carbon, and customer experience</li> <li>Industry recognition and VoC evidence of adaptability during crises</li> </ul>  | <ul style="list-style-type: none"> <li>Referenceable success in operational transformation</li> <li>Vendor status with limited voice in a strategic roadmap</li> </ul>   | Horizon 1 + <ul style="list-style-type: none"> <li>Strategic partner status with measurable outcomes in circularity, customer NPS, and delivery continuity</li> <li>Execution leadership across diverse industries</li> </ul>   | Horizon 2 + <ul style="list-style-type: none"> <li>Clients viewing providers as transformation orchestrators</li> <li>Leading NPS, carbon reduction, and innovation co-investments</li> <li>Positioned as thought leaders amid systemic industry volatility</li> </ul>   |

# 3

## Executive summary and market dynamics

# Executive summary (1/2)

1

## What's happening?

- The prevailing theme of supply chains in 2025 revolves around structural changes to fully harness the potential of technologies such as AI. Significant consolidation is occurring on both the enterprise and vendor sides. Enterprises are integrating various functions and owners under supply chain management, encompassing replenishment, inventory, planning, warehousing, production, and all falling under a unified accountability and leadership framework. The primary objectives are twofold: (i) free up and consolidate budgets for larger-scale end-to-end (E2E) transformation projects and (ii) streamline data, processes, and technologies to accelerate scaling of AI pilots until production. Renowned vendors such as SAP and Blue Yonder are consolidating their respective modules and committing to upfront savings. The goal is to establish a unified cloud intelligence layer, fostering greater interoperability throughout the supply network.
- This market shift will eventually lead to larger deal sizes (\$ value) in supply chains for service providers. Instead of focusing on setting up a control tower or implementing a warehousing solution, they will engage in discussions centered on modernizing E2E supply chains.

2

## Key observations

- Over 90% of clients are engaging with technology vendors and supply chain providers for real-time planning. Supplier collaboration and automated procurement are their next two most important engagement areas.
- The lion's share of tech budgets remains concentrated in traditional strongholds such as analytics (31%) and cloud (26%), collectively accounting for nearly 57% of all enterprise tech spending. However, the biggest surprise is the growing demand for cutting-edge AI technologies, particularly GenAI (12%) and agentic AI (7%), which surpass traditional AI adoption (2%). This shift in enterprise AI adoption narratives signals a significant pivot in the industry. While robotic process automation (RPA) and intelligent automation remain relevant (10%), emerging tools such as the Internet of Things (IoT) are gaining traction and commanding a substantial 10% spend.
  - Clients are spending mostly on the same supply chain activities across consulting, IT, BPO, and managed services.
  - Consulting services: Planning, warehousing, and procurement are the top three areas, accounting for 77% of all supply chain consulting expenditure.
  - IT services: Planning, warehousing, and post-sale service orchestration represent nearly 72% of all supply chain IT expenditure.
  - BPO services: Planning, warehousing, and procurement dominate, making up 65% of all supply chain BPO expenditure.
  - Managed services: Planning, warehousing, and post-sale service orchestration account for 69% of all supply chain managed services expenditure.

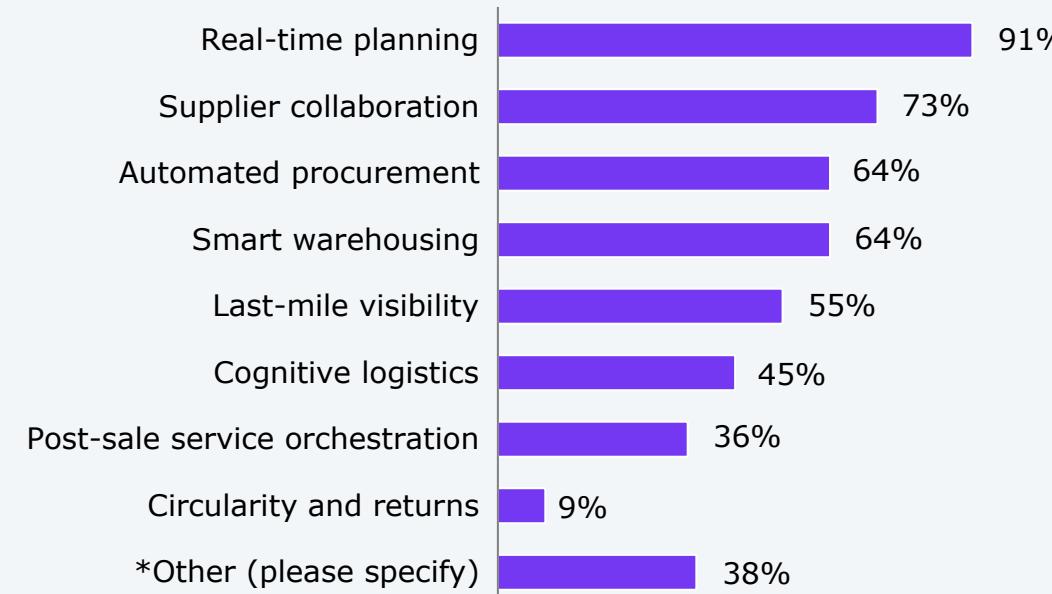
# Executive summary (2/2)

- |   |  |   |
|---|--|---|
| 3 | <b>Clients' preferred technology vendors and service providers</b>             | <ul style="list-style-type: none"><li>• <b>Software vendors:</b> SAP and Microsoft emerged as the top two vendors of choice, getting 86% and 71% of the votes. Oracle was a distant third with 29% of votes.</li><li>• <b>Service providers:</b> Infosys, Accenture, Cognizant, and TCS were identified as the top four strategic providers. Clients praised them for their skills and experience but called for better engagement roadmaps, value pricing, and responsiveness.</li></ul>   |
| 4 | <b>Partners' preferred supply chain providers</b>                              | <ul style="list-style-type: none"><li>Accenture, Deloitte and EY were deemed the top three providers. Accenture and Deloitte were voted among the top three by more than 50% of technology firms, whereas EY was a distant third with 29% of partners endorsing it. Technology partners acknowledged their global scale and expertise but cited inconsistent experience, unclear roadmaps, and slow turnaround as key challenges.</li></ul>   |
| 5 | <b>Leading service providers across the intelligent supply chain ecosystem</b> | <ul style="list-style-type: none"><li>The report reviews 20 supply chain service providers, of which 19 are distinctly analyzed. Seven providers are classified as leaders in Horizon 3, eight as innovators in Horizon 2, and five as disruptors in Horizon 1.</li><li>Horizon 3 firms (Accenture, Capgemini, Cognizant, EY, Genpact, Infosys, and TCS) are ranked as leaders for their ability to build interoperable and adaptive supply networks.</li><li>Horizon 2 firms (Bristlecone, Deloitte, HCLTech, IBM, ITC Infotech, KPMG, Mindsprint, and Tech Mahindra) excelled in their ability to support clients across E2E supply chain operations.</li><li>Horizon 1 firms (Fractal, GEP, PwC, Virtusa, and Wipro) focused primarily on strategic supply chain functions and bringing efficiencies through optimization.</li></ul> |

# Real-time planning and supplier synergy determine the winners in today's supply chain race

In which of the areas of the value chain are you engaging with the provider?

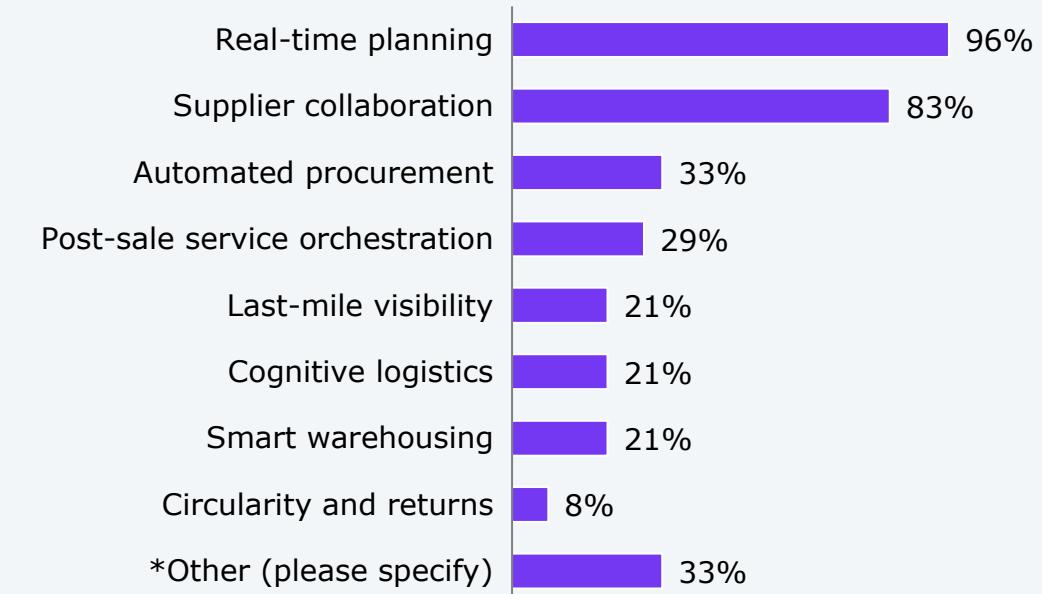
## Enterprise clients



\*Other(please specify): Smart manufacturing, monitoring & analyzing operational KPIs, order management  
Sample size: 11 customer references  
Source: HFS Research, 2025

Please pick the top three areas where you are engaging with supply chain clients.

## Technology partner companies

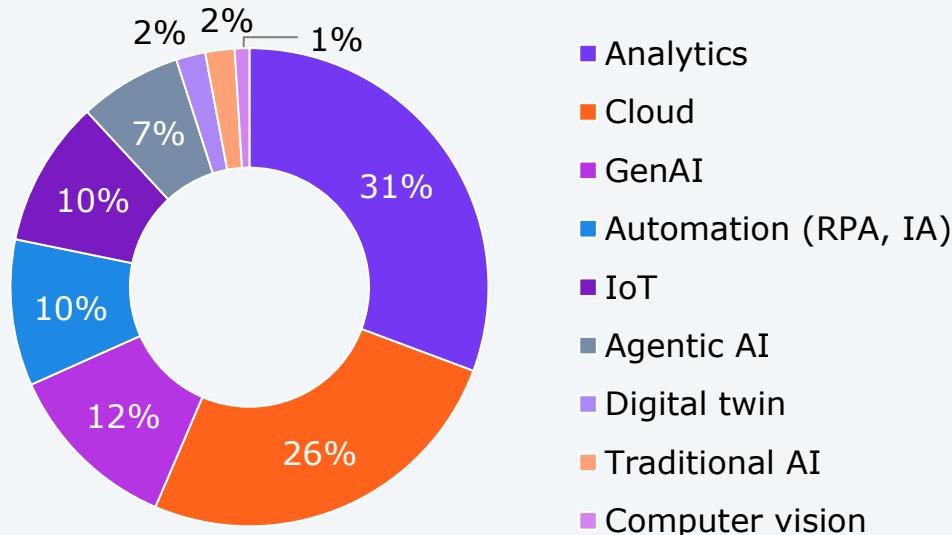


\*Other(please specify): Contract lifecycle management, contract performance, order fulfillment, digital factory transformation  
Sample size: 24 partner references  
Source: HFS Research, 2025

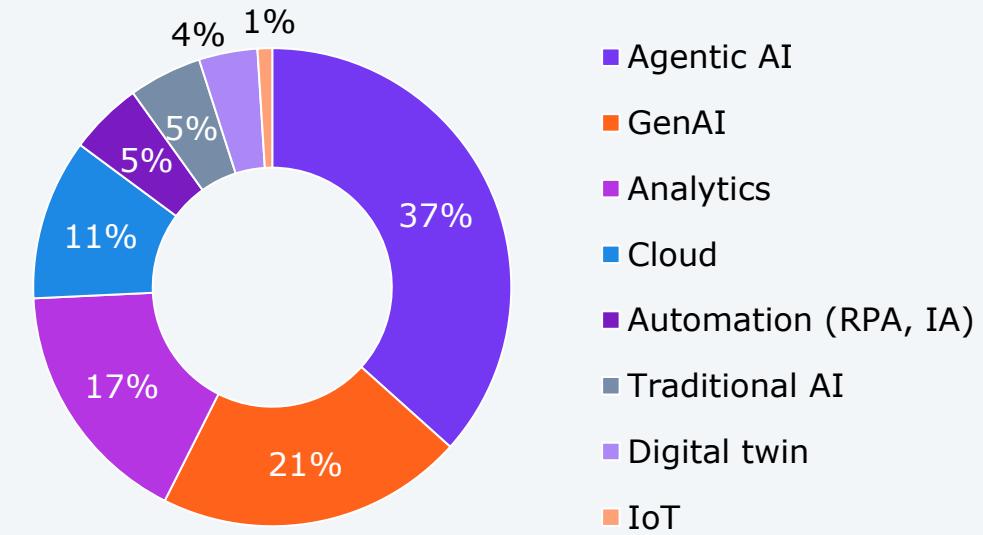
**Clients continue spending on ubiquitous tech such as analytics and cloud, whereas technology companies are prioritizing AI investments with a forward-looking mindset**

**How is your current technology expenditure being allocated across the following technologies?**

**Client references**



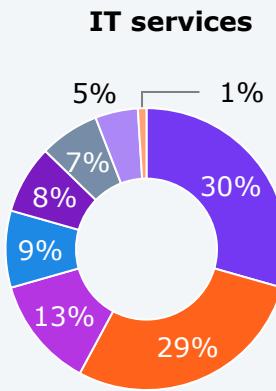
**Technology partner references**



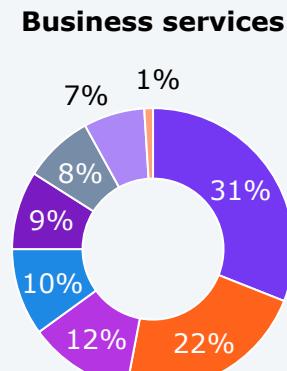
Sample size: 13 customer references, 19 partner references  
Source: HFS Horizons: Intelligent supply chain services, 2025

# The majority of enterprise spending on supply chain services is concentrated in real-time planning and smart warehousing

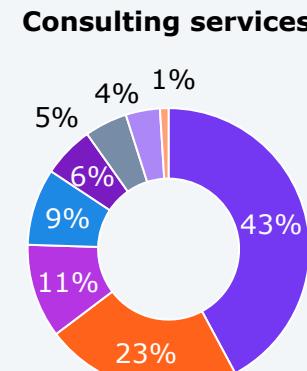
Please provide your estimated spending on service providers for each of the following value chain levers  
(total must add up to 100%)



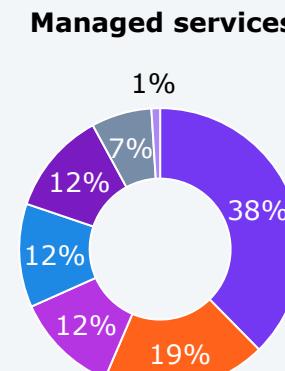
- Real-time planning
- Smart warehousing
- Post-sale service orchestration
- Supplier collaboration
- Automated procurement
- Last-mile visibility
- Cognitive logistics
- Circularity and returns



- Real-time planning
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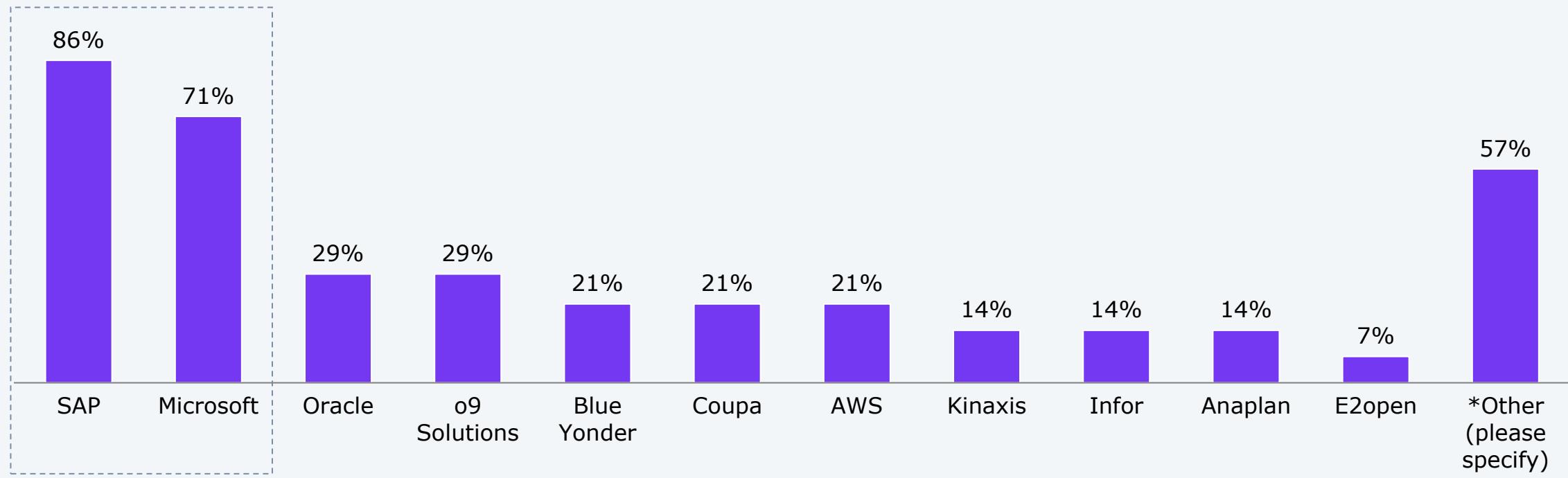


- Real-time planning
- Smart warehousing
- Post-sale service orchestration
- Automated procurement
- Cognitive logistics
- Supplier collaboration
- Last-mile visibility

Sample size: 10 customer references  
Source: HFS Research, 2025

# SAP and Microsoft emerged as the top-choice tech providers for supply chain enterprise clients

**Which technology providers do you leverage while running your supply chain function?**



\*Other: OMP, Rockwell, Siemens, ketteQ, Ariba, Osapiens, Plex, Nulogy, and other tools

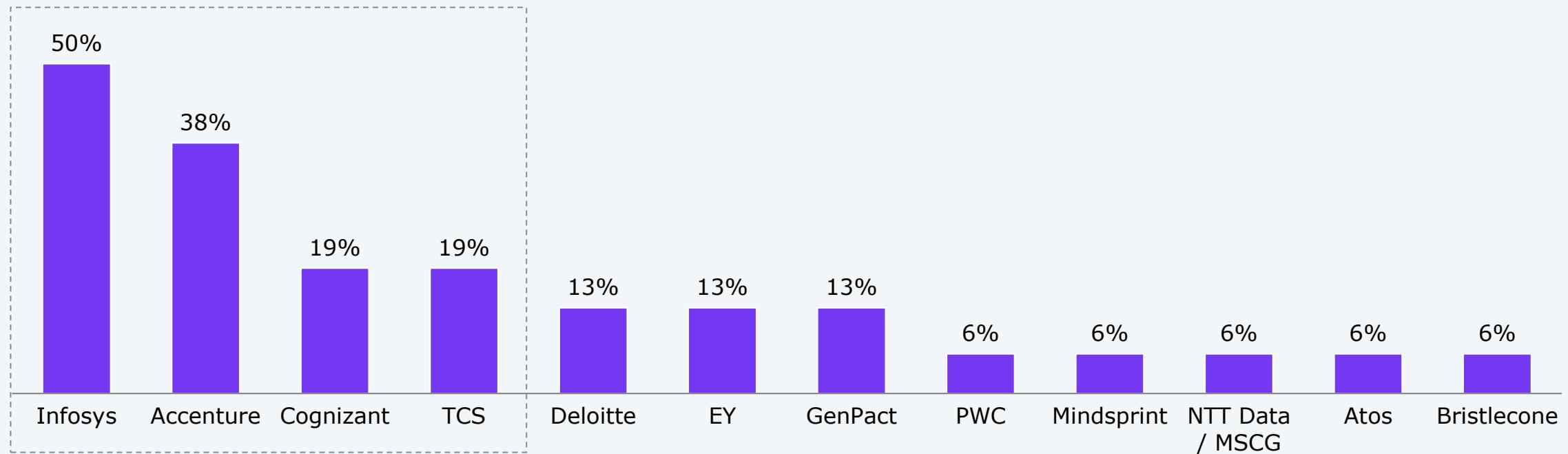
Sample size: 14 customer references

Source: HFS Research, 2025

# Infosys, Accenture, Cognizant, and TCS emerged as clients' top-choice providers for supply chain services

## Please name your top three strategic IT/business service providers

(provider may/may not feature in the top three)



Sample size: 28 customer references  
Source: HFS Research, 2025

# Clients praise supply chain providers for their skills and experience but demand better engagement roadmaps, value pricing, and responsiveness

## What enterprise clients praise

Thought leadership consistently stands out

Talent depth and reliable business continuity

Supply chain domain capabilities

Execution excellence

Collaboration with client teams and clear value realization

Domain expertise and analytics-driven problem solving

Technical design and execution capabilities

## Where clients demand improvement

Pricing transparency and competitiveness

Responsiveness and turnaround speed

Proactive and clear communication and stakeholder updates

Roadmap clarity, including milestones and ownership

Tighter integration across platforms and solutions

Talent depth and continuity in critical roles

Governance and risk management

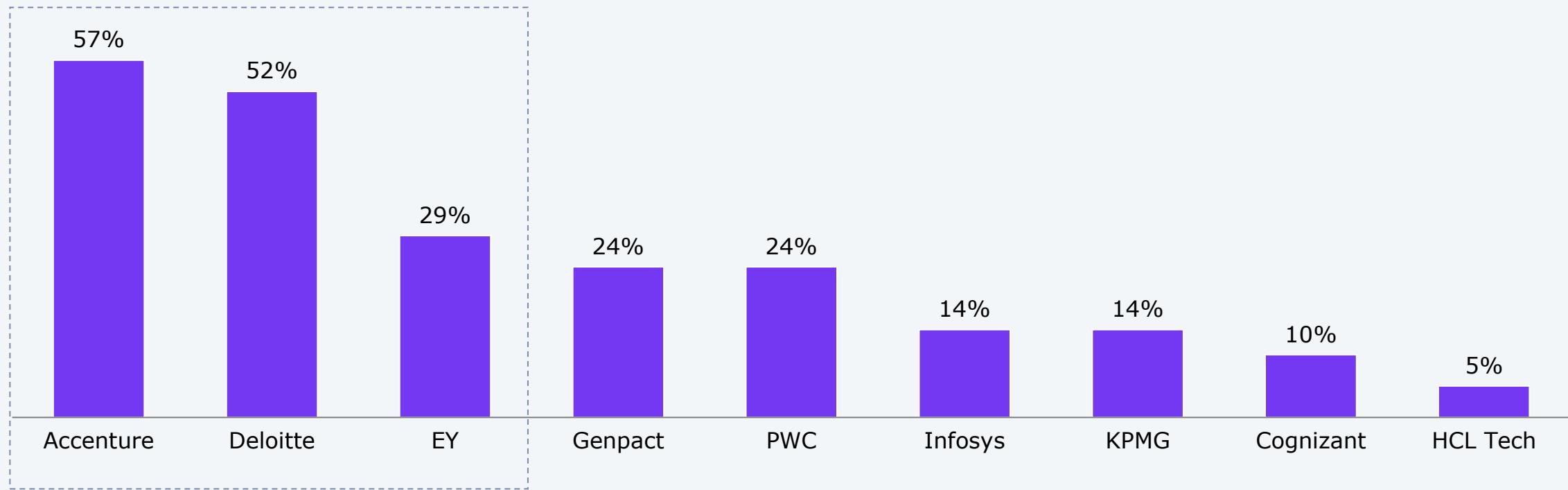
Innovation should be tied more directly to business outcomes, not technology for its own sake

Sample size: 11 customer references  
Source: HFS Research, 2025

# Accenture, Deloitte, and EY emerged as technology partner firms' top choice for providing supply chain services

**Please name your top three strategic IT/business service providers**

(provider may/may not feature in the top three)



Sample size: 21 partner references  
Source: HFS Research, 2025

# Technology partners recognize service providers' global scale and expertise but complain about inconsistent experience, unclear roadmaps, and slow turnaround

## What partners praise

Breadth and depth across the value chain

Deep expertise and strong domain knowledge

Responsive and collaborative

Global scale and go-to-market execution delivering consistent outcomes

Consulting skills translating into measurable value for clients

Overall delivery quality and ability to drive transformation are seen as strengths

## What partners want to be improved

Faster responsiveness and more proactive communication are top asks

Pricing is viewed as high and needs clearer value justification

Integration across offerings, platforms, and technologies should be tighter

Talent depth and speed of execution are inconsistent across engagements

Clients want stronger enablement, governance, and joint planning

Roadmaps need to be clearer, with milestones and ownership

Greater focus on specific platforms (e.g., ServiceNow) and portfolio prioritization is requested

Sample size: 24 Partner references  
Source: HFS Research, 2025

# 4

# Horizons results: Intelligent supply chain services, 2025

# Service providers covered in this report



BRISTLEcone



Deloitte.



fractaloo



HCLTech



Infosys®



MINDSPRINT



TECH  
mahindra

virtusa

wipro

Note: All service providers are listed alphabetically.

# HFS Horizons: A summary of intelligent supply chain service providers assessed in this report

| Providers<br>(alphabetical order) | HFS point of view  |
|-----------------------------------|--|
| <b>Accenture</b>                  | Recent AI-native warehousing and Oracle-led logistics transformations fueling an already dominant supply chain proposition |
| <b>Bristlecone</b>                | Pure-play, consulting-led SCM practice leading with AI-first SAP/Kinaxis supply chain engagements                          |
| <b>Capgemini</b>                  | Connected business operations and zero-touch supply chains aided by AI advancements  |
| <b>Cognizant</b>                  | AI and sustainability-led supply chain modernization with deep retail and manufacturing wins                               |
| <b>Deloitte</b>                   | Kinetic supply networks and resiliency orchestration with sustainability at the core                                       |
| <b>EY</b>                         | Driving boardroom-level supply chain reinvention with advanced decision intelligence                                       |
| <b>Fractal</b>                    | AI-driven planning and execution for measurable supply chain savings   |
| <b>Genpact</b>                    | Dynamic, AI-optimized supply chain operations delivering measurable financial impact                                       |
| <b>GEP</b>                        | AI-first procurement and supply chain orchestration with software + consulting synergy                                     |
| <b>HCL Tech</b>                   | AI-first supply chain modernization with digital twins and agentic automation at scale                                     |

| Providers<br>(alphabetical order) | HFS point of view  |
|-----------------------------------|--|
| <b>IBM</b>                        | Intelligent orchestration from procurement to resilient operations                               |
| <b>Infosys</b>                    | Intelligent, AI-first supply chain services powered by Live enterprise design                    |
| <b>ITC Infotech</b>               | Data-driven supply chain visibility and optimization with pragmatic AI and control towers        |
| <b>KPMG</b>                       | Powered supply chain orchestration anchored in advisory + platform synergy                       |
| <b>Mindsprint</b>                 | Building AI-powered, modular supply chains for faster decision-making                            |
| <b>PwC</b>                        | Connected and resilient supply chains enabled by tax, risk & digital orchestration               |
| <b>TCS</b>                        | Full-stack supply chain transformation from data to autonomy with pragmatic AI and digital twins |
| <b>Tech Mahindra</b>              | Cognitive, AI-accelerated supply chains with deep industry context                               |
| <b>Virtusa</b>                    | Design-led modernization to simplify and scale complex supply chains                             |
| <b>Wipro</b>                      | Enterprise-scale supply chain run and transformation with measurable outcomes                    |

# HFS Horizons: Intelligent supply chain services, 2025 – aligning enterprise objectives with service provider value



## Horizon 3 – Interoperable, intelligent, and purpose-led networks

### Service providers demonstrate Horizon 2 capabilities plus:

- Realize the vision of intelligent, interoperable, and connected supply networks
- Lead the systemic transformation of supply chains through AI, data platforms, and digital twins
- Market-shaping investments in interoperable architectures, proprietary IP, and sustainable innovation frameworks
- Engage in purpose-led transformation, influencing policy, industry benchmarks, and social impact
- Recognized as thought leaders creating value through connected ecosystems, resilience engineering, and adaptive operations

## Horizon 2 – Adaptive, sustainable, and cross-enterprise

### Service providers demonstrate Horizon 1 capabilities plus

- Proficiency in orchestrating cross-functional and cross-enterprise integration (e.g., planning, procurement, logistics, and returns)
- Strong client references for collaborative innovation and business value delivery
- Outcome-based partnerships with clients and ecosystem partners, moving beyond transactional models
- Embedded focus on stakeholder experience, adaptability to disruption, and continuous improvement

## Horizon 1 – Digitally optimized and operationally resilient

### Service providers demonstrate

- The ability to digitally optimize discrete supply chain functions for cost efficiency, speed, and accuracy
- Functional transformation enabled by emerging analytics, control tower pilots, and responsive workflows
- A clear GTM strategy focused on operational resilience and value realization
- Emerging narratives around sustainability and risk mitigation
- Predominantly effort-based, SLA-driven client relationships with limited business model innovation



# EY profile: Intelligent supply chain services, 2025

# EY: Driving boardroom-level supply chain reinvention with advanced decision intelligence

| HORIZON 3 – Market Leader   | Strengths   | Development opportunities   |
|---|---|---|
|  | <ul style="list-style-type: none"> <li><b>Key differentiators:</b> EY has boardroom-level trust with CFOs and CEOs, going beyond the traditional CSCO buyer to influence enterprise-level transformation. Tax, trade, incentive, and supply chain strategies are deeply integrated. The firm is building a strong ecosystem with Microsoft, ServiceNow, NVIDIA, and Databricks.</li> <li><b>Technology innovation:</b> EY has built a supply chain operations platform, comprising accelerators and data fabric to unlock insights from fragmented supply chain data lakes and support simulation-driven planning. Other notable developments are ServiceNow-powered intelligent workflows and alliance-driven hardware-enabled AI with NVIDIA and Dell.</li> <li><b>Key outcomes:</b> EY helped a \$3 billion health and CPG firm reconfigure its supply network, relocate manufacturing, and unlock incentives 5x the project costs while optimizing its labor and tax footprint. It led an enterprise digital supply chain transformation for a global leader in premium drinks, generating \$1.5 billion in productivity gains and a major sustainability impact.</li> <li><b>Clients and partner kudos:</b> Partners appreciate its strong capabilities in supply chain planning and operations, flexibility, and domain expertise. Clients commend its value generation and innovation capabilities.</li> </ul> | <ul style="list-style-type: none"> <li><b>What we'd like to see more of:</b> More visible differentiation in execution-led offerings beyond advisory. Also, a clearer narrative around the positioning of managed services to avoid confusion with traditional IT outsourcing.</li> <li><b>Opportunity in the next 12 months:</b> Expand CFO-focused value engineering playbooks to secure new transformation budgets amid economic uncertainty.</li> <li><b>Clients and partner critique:</b> Partners want EY to expand its industry and domain expertise. Clients expect cost competitiveness and thought leadership.</li> </ul> |
| HORIZON 2 – Enterprise Innovator  |   |   |
| HORIZON 1 – Disruptor   |   |   |



| Partnerships   | Key clients   | Global operations and resources  | Flagship internal IP   |
|--|---|--|--|
| P&G, Microsoft, SAP, Blue Yonder, OMP, IBM, Kinaxis, ServiceNow, o9 Solutions, Nottingham Spirk, GE Digital, Aera, Hexagon | <p><b>Number of supply chain clients:</b> 7,500</p> <p><b>Key clients:</b></p> <ul style="list-style-type: none"> <li>96% of the top 50 supply chain companies</li> <li>75% of the Fortune 100</li> </ul> | <p><b>Supply chain headcount:</b> 6,800+</p> <p><b>Delivery and innovation centers:</b></p> <ul style="list-style-type: none"> <li>Operates in 150+ countries</li> <li>&gt;1,700 GDS (Global Delivery Services) off-shore supply chain and operations resources</li> <li>EY Digital Operations Hub @ MxD (Manufacturing X Digital) for advanced manufacturing and supply chain technologies</li> <li>EY wavespace™ Innovation Centers in London, New York, Frankfurt, Sydney, Mumbai, and Stuttgart</li> </ul> | <ul style="list-style-type: none"> <li>EY Supply Chain Operations Platform: GenAI powered end-to-end data curation across client enterprise systems and custom applications</li> <li>Aera Demand Sensing: Automates the top 100 key decisions on supply chain</li> <li>Global Trade Analytics: Cloud-based trade intelligence using Microsoft Azure SQL to enhance visibility, manage risks, and identify opportunities in global trade</li> </ul> |

# 6

# HFS Research authors

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**Ashish Chaturvedi**

Executive Research Leader

[ashish.chaturvedi@hfsresearch.com](mailto:ashish.chaturvedi@hfsresearch.com)

Ashish Chaturvedi is an Executive Research Leader for HFS Research. He covers supply chain operations, the retail and CPG industry, and data platforms. He is an accomplished IT industry analyst, regarded as a top retail expert globally, and is featured regularly in various IT media publications. Additionally, he is a member of multiple industry associations, including RetailWire BrainTrust and RETHINK Retail. With more than 16 years of technology research experience, Ashish has authored over 100 research reports covering retail technologies, enterprise modernization, the platform economy, future supply networks, data platforms, and digital-driven growth.

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



**Krupa KS**

Senior Analyst

[krupa.ks@hfsresearch.com](mailto:krupa.ks@hfsresearch.com)

Krupa KS is a senior analyst for HFS Research. She supports the firm's research initiatives across several key categories: customer experience, retail and CPG, supply chain, and travel and hospitality. Her responsibilities include IT and business process outsourcing contracts data collection, and analysis of various service lines.

Before joining HFS, Krupa had several years of experience in business research and analysis with Excellence4U Research Services. As a member of the market research team, Krupa's responsibilities involved secondary research for company profiling, industry analysis, and competitive analysis. At Excellence4U, she also worked with the technology mapping team that learned about clients' businesses and how products were used by the target audiences, which helped her clients better understand the needs of their customers.

## About HFS

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

HFS Research is a leading global research and advisory firm helping Fortune 500 companies through IT and business transformation with bold insights and actionable strategies.

With an unmatched platform to reach, advise, and influence Global 2000 executives, we empower organizations to make decisive technology and service choices. Backed by fearless research and an impartial outside perspective, our insights give you the edge to stay ahead.



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