Intelligent Supply Chain Services, 2025

Enabled by interoperability, resilience, and adaptability

Authors:

Ashish Chaturvedi, Executive Research Leader
Krupa KS, Senior Analyst

Excerpt for Genpact

"

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

Contents

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 <u>vendor evaluation research vehicle</u> 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.

Excerpt for Genpact

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:

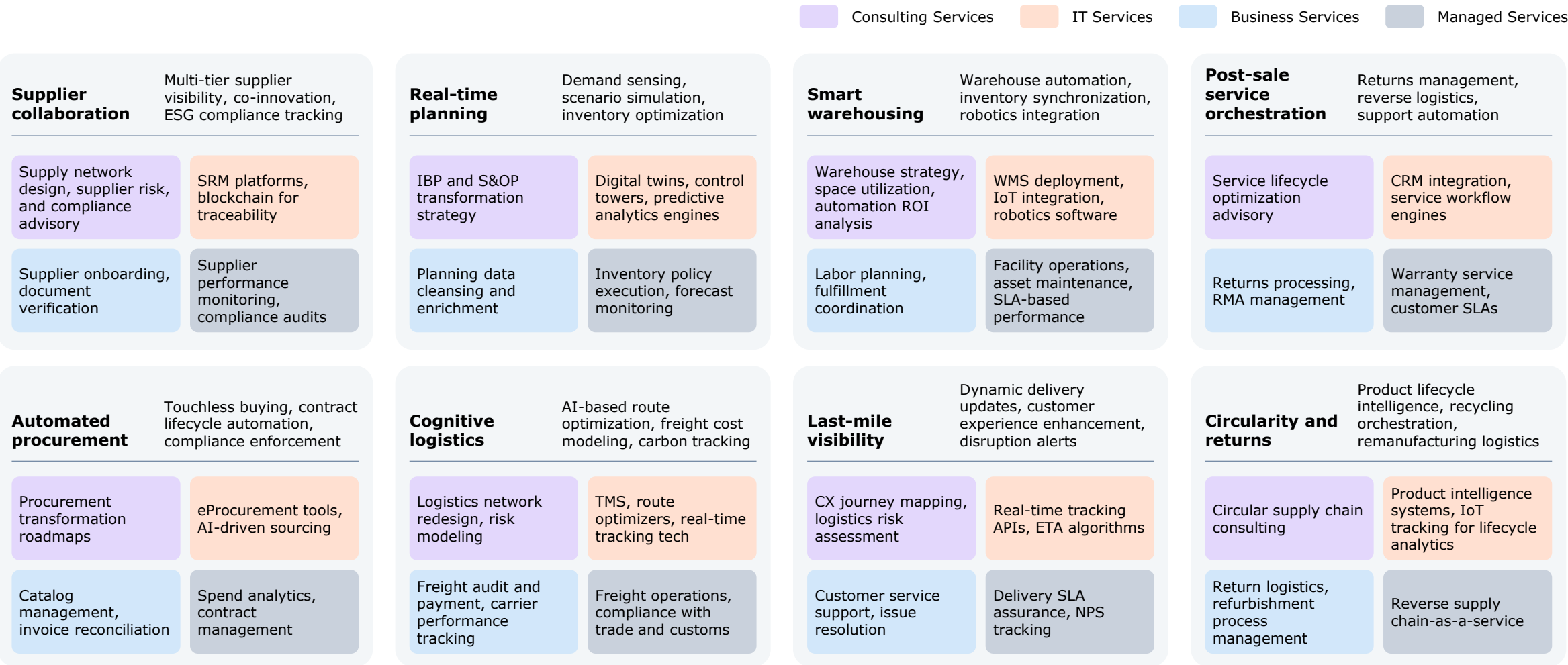|	**Revenue**
	Annual revenue of $250 million from supply chain services or a 10%+ contribution from supply chain services to their annual revenues

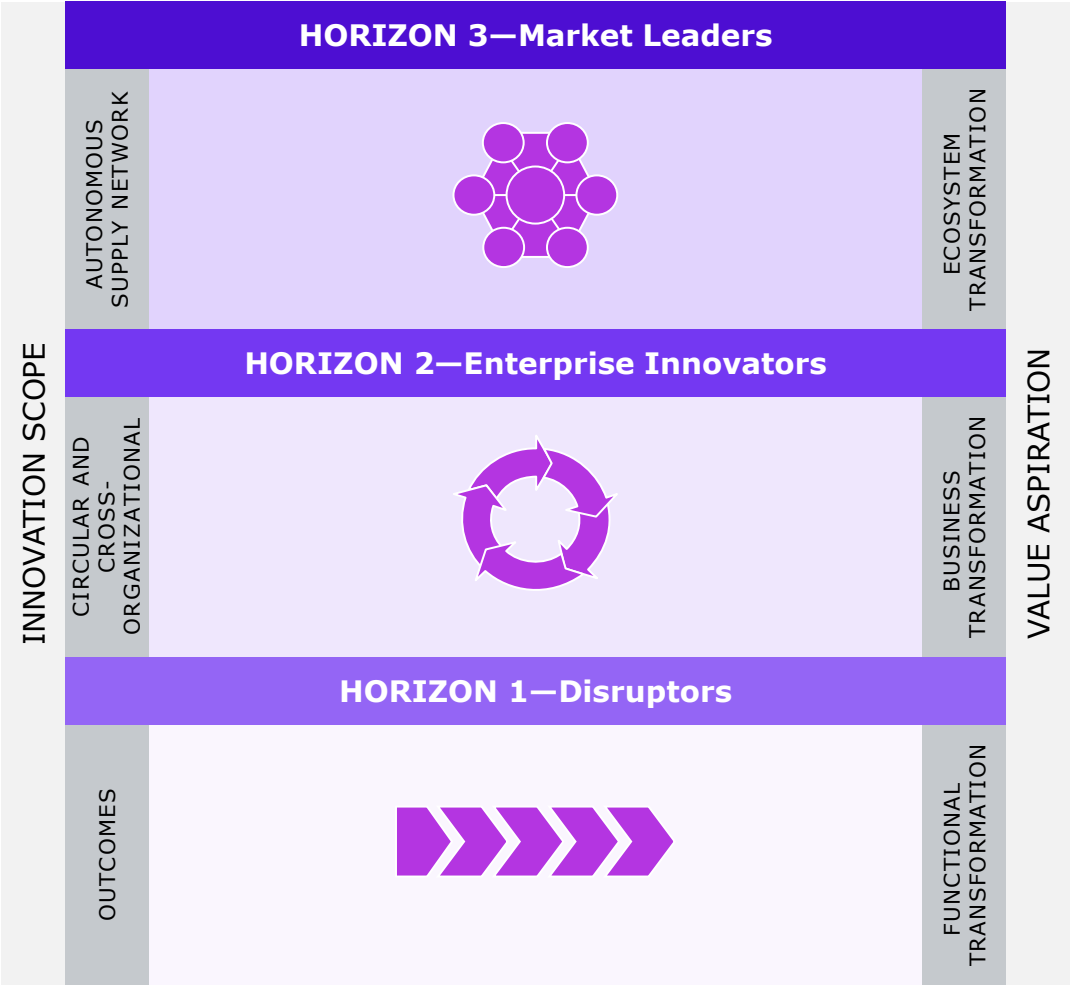|	**Services**
	An existing portfolio of industry-specific services that coincide (partially or completely), spanning HFS's supply chain value chain

Excerpt for Genpact

HFS Horizons

1 Introduction and the HFS supply chain services value chain

HFS Horizons

Excerpt for Genpact

Intelligent Supply Chain Services, 2025 | 6

HFS's value chain spanning supply chain services

| | Consulting Services | IT Services | Business Services | Managed Services |

Supplier collaboration
Multi-tier supplier visibility, co-innovation, ESG compliance tracking

Supply network design, supplier risk, and compliance advisory	SRM platforms, blockchain for traceability
Supplier onboarding, document verification	Supplier performance monitoring, compliance audits

Real-time planning
Demand sensing, scenario simulation, inventory optimization

IBP and S&OP transformation strategy	Digital twins, control towers, predictive analytics engines
Planning data cleansing and enrichment	Inventory policy execution, forecast monitoring

Smart warehousing
Warehouse automation, inventory synchronization, robotics integration

Warehouse strategy, space utilization, automation ROI analysis	WMS deployment, IoT integration, robotics software
Labor planning, fulfillment coordination	Facility operations, asset maintenance, SLA-based performance

Post-sale service orchestration
Returns management, reverse logistics, support automation

Service lifecycle optimization advisory	CRM integration, service workflow engines
Returns processing, RMA management	Warranty service management, customer SLAs

Automated procurement
Touchless buying, contract lifecycle automation, compliance enforcement

Procurement transformation roadmaps	eProcurement tools, AI-driven sourcing
Catalog management, invoice reconciliation	Spend analytics, contract management

Cognitive logistics
AI-based route optimization, freight cost modeling, carbon tracking

Logistics network redesign, risk modeling	TMS, route optimizers, real-time tracking tech
Freight audit and payment, carrier performance tracking	Freight operations, compliance with trade and customs

Last-mile visibility
Dynamic delivery updates, customer experience enhancement, disruption alerts

CX journey mapping, logistics risk assessment	Real-time tracking APIs, ETA algorithms
Customer service support, issue resolution	Delivery SLA assurance, NPS tracking

Circularity and returns
Product lifecycle intelligence, recycling orchestration, remanufacturing logistics

Circular supply chain consulting	Product intelligence systems, IoT tracking for lifecycle analytics
Return logistics, refurbishment process management	Reverse supply chain-as-a-service

Excerpt for Genpact

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

HORIZON 3—Market Leaders

AUTONOMOUS SUPPLY NETWORK

ECOSYSTEM TRANSFORMATION

HORIZON 2—Enterprise Innovators

CIRCULAR AND CROSS-ORGANIZATIONAL

BUSINESS TRANSFORMATION

HORIZON 1—Disruptors

OUTCOMES

FUNCTIONAL TRANSFORMATION

INNOVATION SCOPE

VALUE ASPIRATION

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

Excerpt for Genpact

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?

Excerpt for Genpact
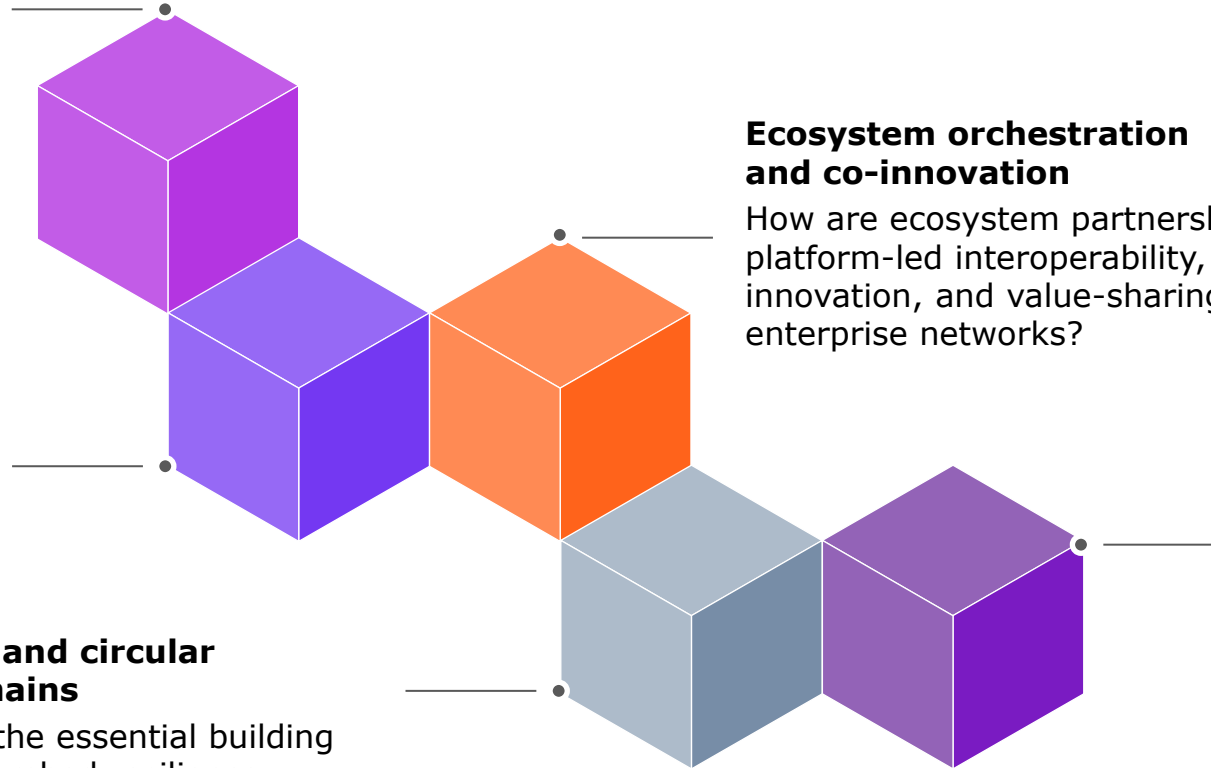
2

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.
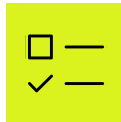
Reference checks

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
Value proposition: The Why? (25%)	• Strategy and vision for modern, connected supply chain services • Supply chain offerings that address real-time adaptability, ecosystem collaboration, and regulatory risk (e.g., tariffs, ESG compliance) • Competitive differentiators that enable platform integration and resilience	• Ability to drive functional digital transformation by delivering cost, speed, and basic responsiveness benefits • Incremental platform adoption to support digital visibility	Horizon 1 + • Driving interoperable, adaptive supply chains with sustainability, traceability, and customer-centricity in mind • Enhancing value prop via predictive analytics, stakeholder experience, and supply chain circularity	Horizon 2 + • Visionary strategy for future-ready, networked supply ecosystems • Orchestrating autonomous, self-learning, and resilient platforms amid global disruption and compliance complexity
Execution and innovation capabilities: The What? (25%)	• Breadth of tech, business, consulting, and managed services across the value chain • Differentiation through real-time scenario handling, circularity, risk sensing, and automation at scale • Depth of talent, delivery model, and industry adoption • Focus on resilient architectures, digital twins, and use of AI agents	• Focused execution in key supply chain areas • Technical capabilities rooted in labor efficiency • Early-stage control towers, IoT, or platform enablement • Emerging sustainability narrative	Horizon 1 + • E2E delivery of adaptive services (planning to returns) • Global talent base, clear innovation roadmap • Strong partnerships in data, cloud, and ESG • AI/ML used for continuous planning and disruption detection	Horizon 2 + • Autonomous decisioning, platform-native workflows • Ecosystem-led innovation at scale • Integrated offerings across consulting, IT, business, and managed services • Ability to recode operations amid crises like trade conflicts, pandemics, and climate shocks
Go-to-market strategy: The How? (25%)	• Nature of investments (platforms, R&D, AI) • Co-innovation with customers and hyperscalers • Commercial agility and risk-sharing models	• Established go-to-market (GTM) strategy rooted in effort-based engagement • Transactional programs with low orchestration complexity	Horizon 1 + • Supply chain-specific GTM with adaptive solutioning • Data-led stakeholder engagement • Outcomes tied to sustainability, risk, and agility KPIs	Horizon 2+ • Investments in resilience playbooks, platform partnerships, and agentic automation • Market-making and co-creation hubs with partners • GTM focused on value creation despite disruption, supported by dynamic pricing/commercial models
Market impact: The So What? (25%)	• Scale of services across sectors and geographies • Ability to drive real-world outcomes across cost, agility, carbon, and customer experience • Industry recognition and VoC evidence of adaptability during crises	• Referenceable success in operational transformation • Vendor status with limited voice in a strategic roadmap	Horizon 1 + • Strategic partner status with measurable outcomes in circularity, customer NPS, and delivery continuity • Execution leadership across diverse industries	Horizon 2 + • Clients viewing providers as transformation orchestrators • Leading NPS, carbon reduction, and innovation co-investments • Positioned as thought leaders amid systemic industry volatility

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.

Excerpt for Genpact

HFS Horizons

Executive summary (2/2)

3 **Clients' preferred technology vendors and service providers**

- **Software vendors:** 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.
- **Service providers:** 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.

4 **Partners' preferred supply chain providers**

- 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.
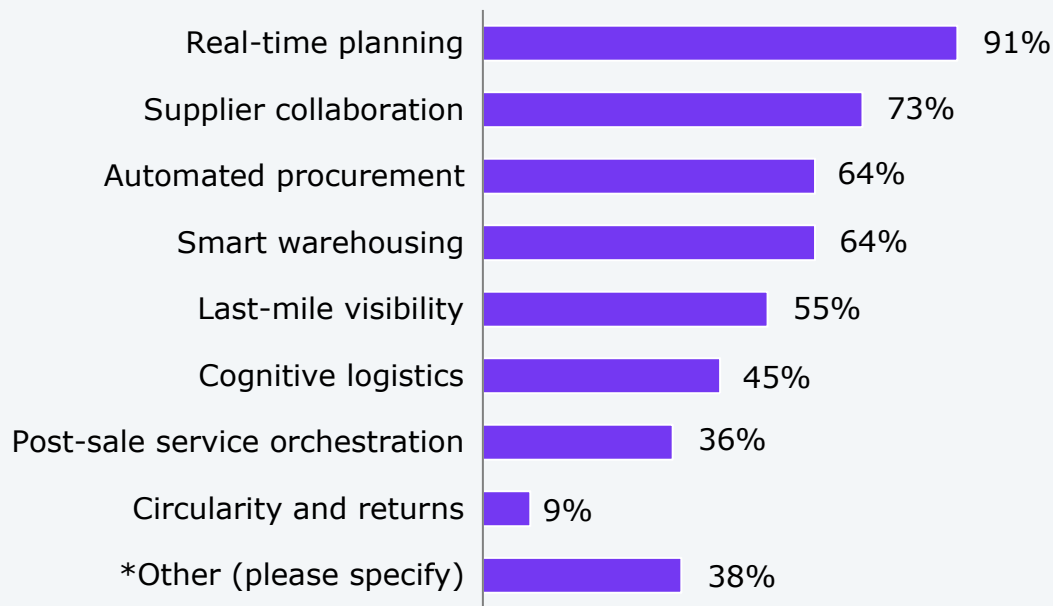
5 **Leading service providers across the intelligent supply chain ecosystem**

- 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.
- 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.
- 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.
- Horizon 1 firms (Fractal, GEP, PwC, Virtusa, and Wipro) focused primarily on strategic supply chain functions and bringing efficiencies through optimization.

Excerpt for Genpact

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

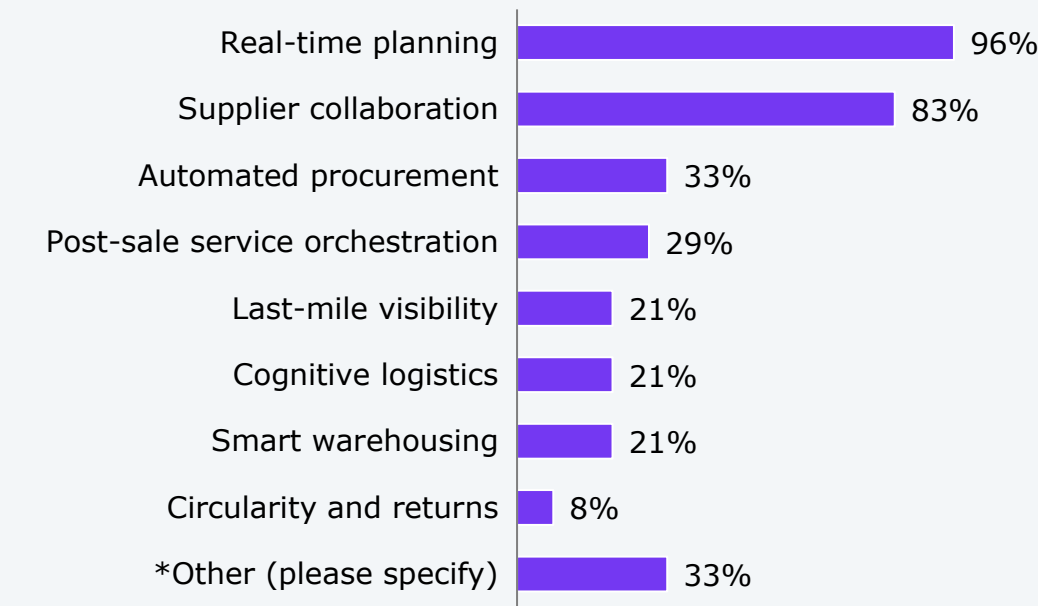## In which of the areas of the value chain are you engaging with the provider?

Enterprise clients

Area	%
Real-time planning	91%
Supplier collaboration	73%
Automated procurement	64%
Smart warehousing	64%
Last-mile visibility	55%
Cognitive logistics	45%
Post-sale service orchestration	36%
Circularity and returns	9%
*Other (please specify)	38%

*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

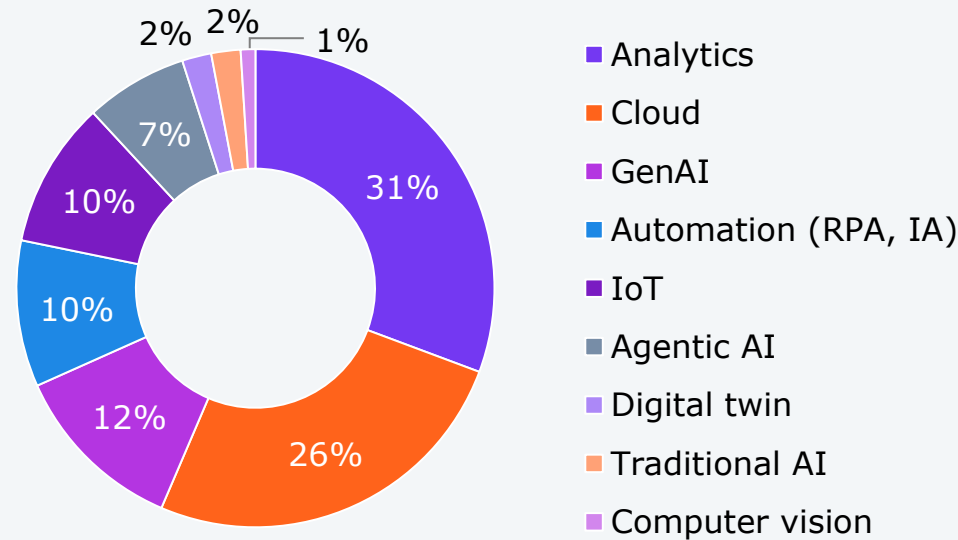| Area	%
Real-time planning	96%
Supplier collaboration	83%
Automated procurement	33%
Post-sale service orchestration	29%
Last-mile visibility	21%
Cognitive logistics	21%
Smart warehousing	21%
Circularity and returns	8%
*Other (please specify)	33%

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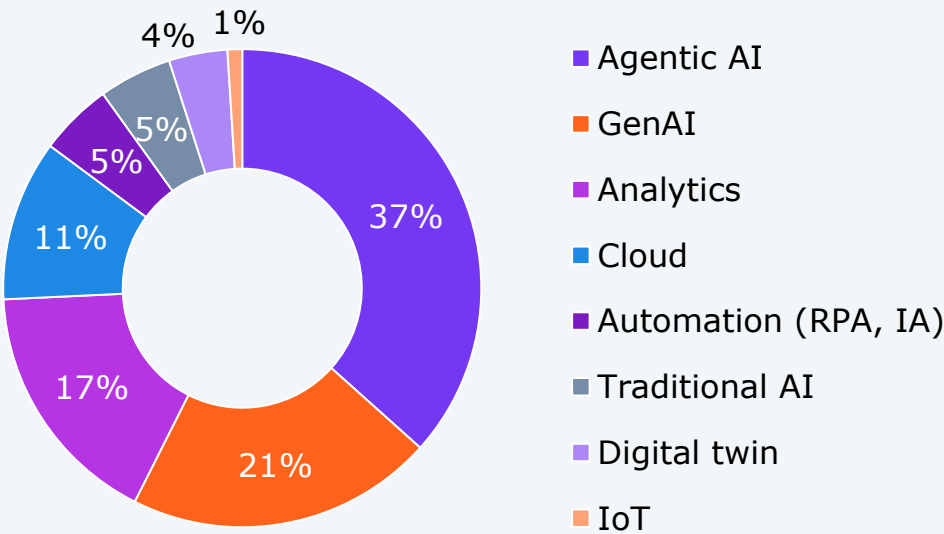Source: HFS Research, 2025

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?
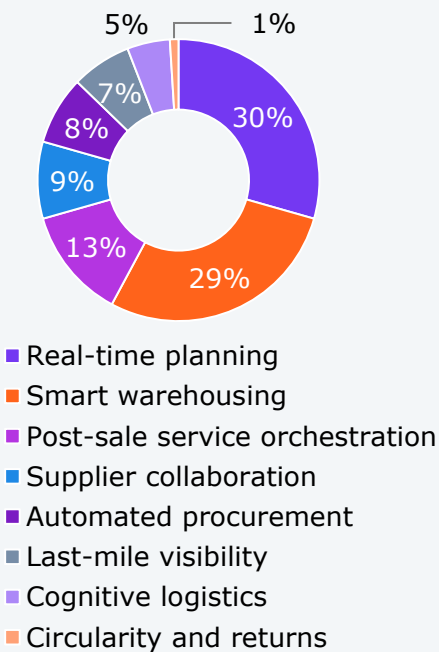
Client references

- Analytics — 31%
- Cloud — 26%
- GenAI — 12%
- Automation (RPA, IA) — 10%
- IoT — 10%
- Agentic AI — 7%
- Digital twin — 2%
- Traditional AI — 2%
- Computer vision — 1%

Technology partner references

- Agentic AI — 37%
- GenAI — 21%
- Analytics — 17%
- Cloud — 11%
- Automation (RPA, IA) — 5%
- Traditional AI — 5%
- Digital twin — 4%
- IoT — 1%

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%)
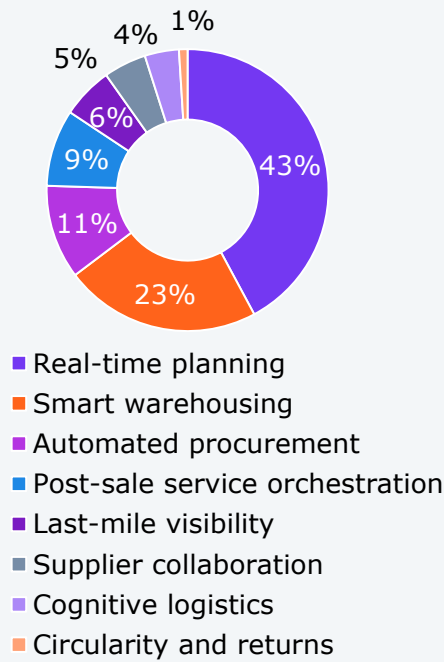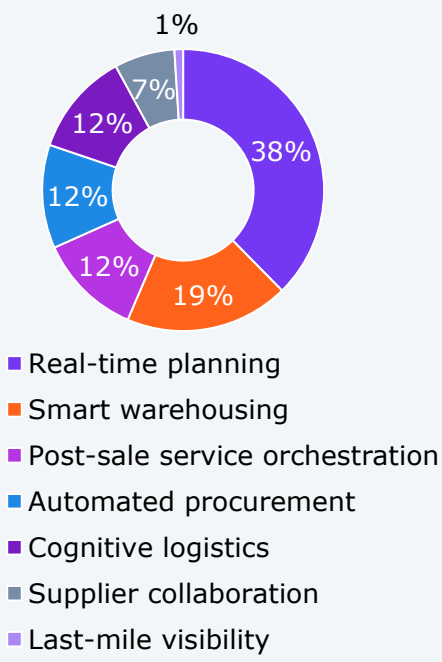
IT services

- 30% Real-time planning
- 29% Smart warehousing
- 13% Post-sale service orchestration
- 9% Supplier collaboration
- 8% Automated procurement
- 7% Last-mile visibility
- 5% Cognitive logistics
- 1% Circularity and returns

Business services

- 31% Real-time planning
- 22% Smart warehousing
- 12% Automated procurement
- 10% Last-mile visibility
- 9% Cognitive logistics
- 8% Supplier collaboration
- 7% Post-sale service orchestration
- 1% Circularity and returns

Consulting services

- 43% Real-time planning
- 23% Smart warehousing
- 11% Automated procurement
- 9% Post-sale service orchestration
- 6% Last-mile visibility
- 5% Supplier collaboration
- 4% Cognitive logistics
- 1% Circularity and returns

Managed services

- 38% Real-time planning
- 19% Smart warehousing
- 12% Post-sale service orchestration
- 12% Automated procurement
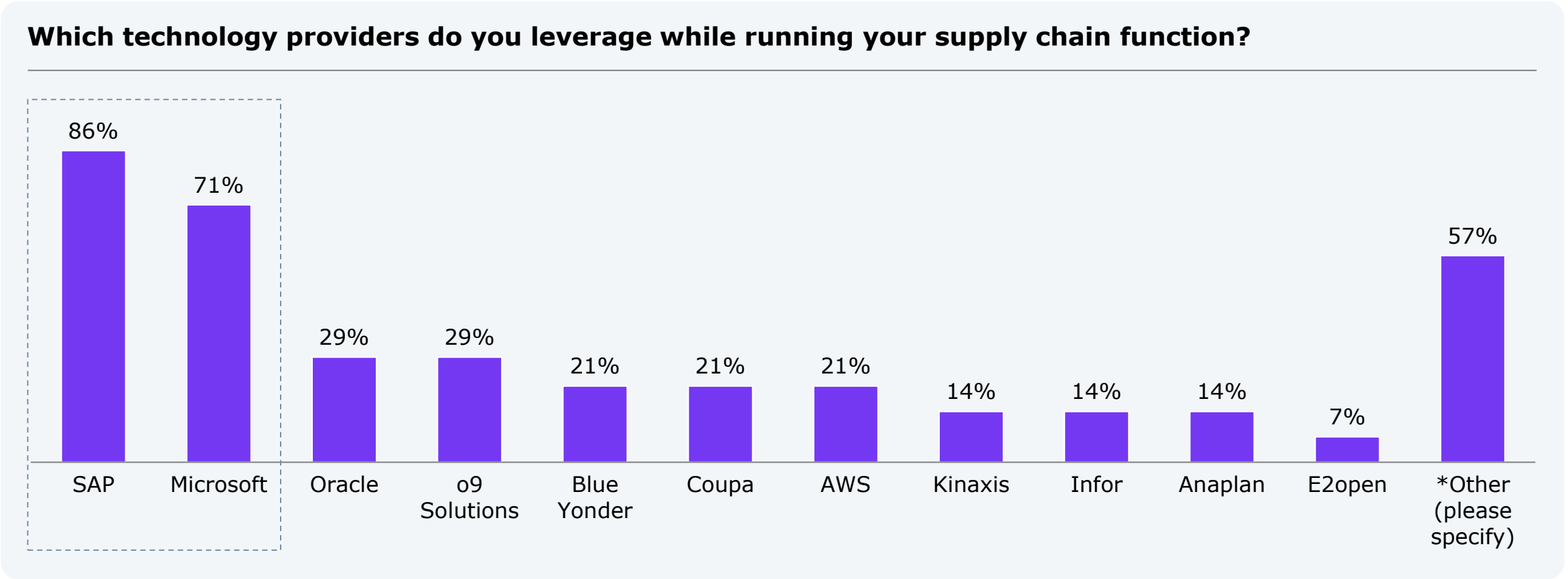- 12% Cognitive logistics
- 7% Supplier collaboration
- 1% Last-mile visibility

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?

Provider	%
SAP	86%
Microsoft	71%
Oracle	29%
o9 Solutions	29%
Blue Yonder	21%
Coupa	21%
AWS	21%
Kinaxis	14%
Infor	14%
Anaplan	14%
E2open	7%
*Other (please specify)	57%

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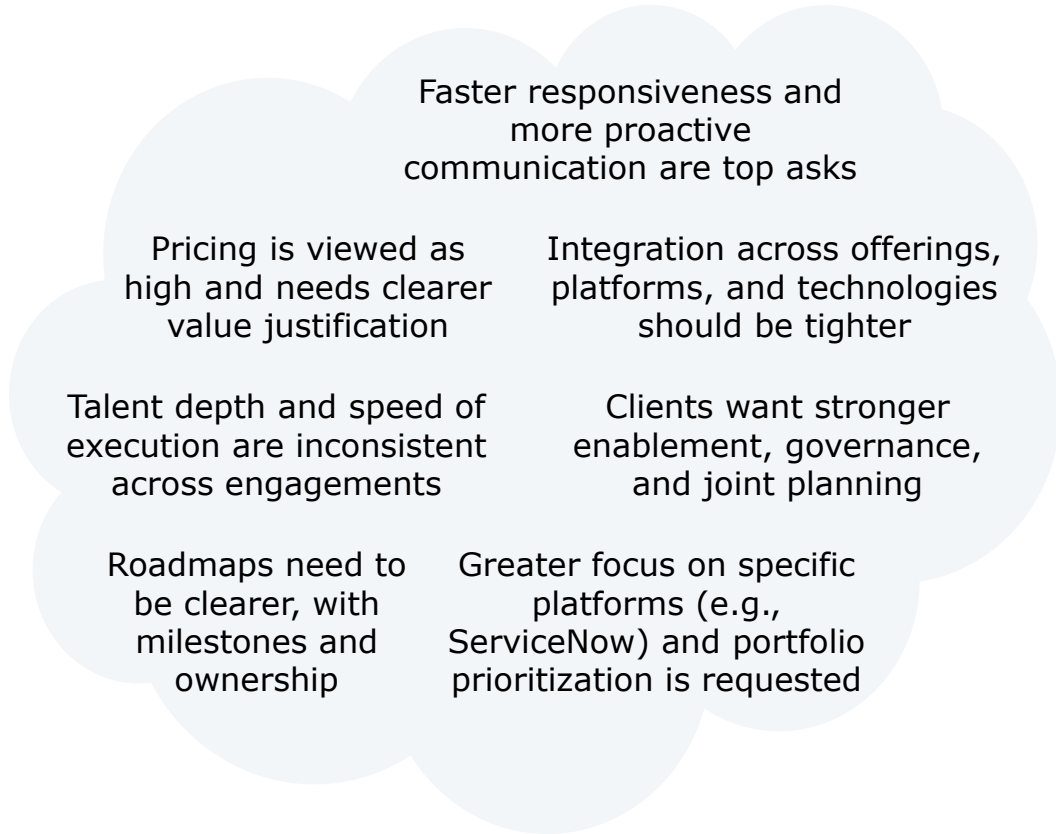(provider may/may not feature in the top three)

Provider	Percentage
Infosys	50%
Accenture	38%
Cognizant	19%
TCS	19%
Deloitte	13%
EY	13%
GenPact	13%
PWC	6%
Mindsprint	6%
NTT Data / MSCG	6%
Atos	6%
Bristlecone	6%

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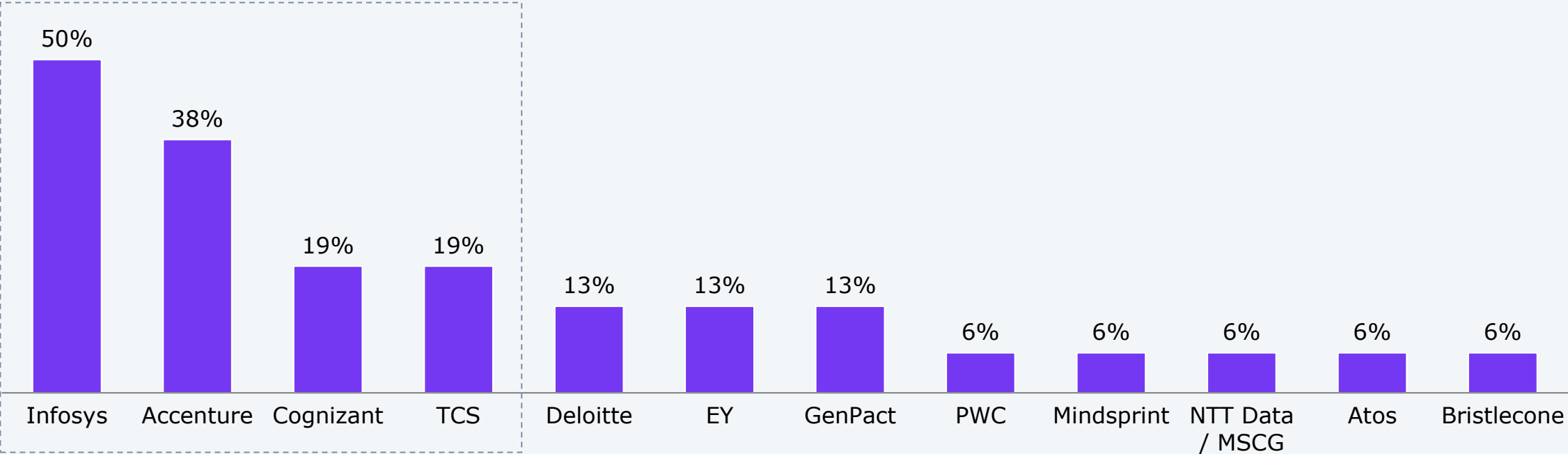
Clients praise supply chain providers for their skills and experience but demand better engagement roadmaps, value pricing, and responsiveness

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

Excerpt for Genpact

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)

Accenture	Deloitte	EY	Genpact	PWC	Infosys	KPMG	Cognizant	HCL Tech
57%	52%	29%	24%	24%	14%	14%	10%	5%
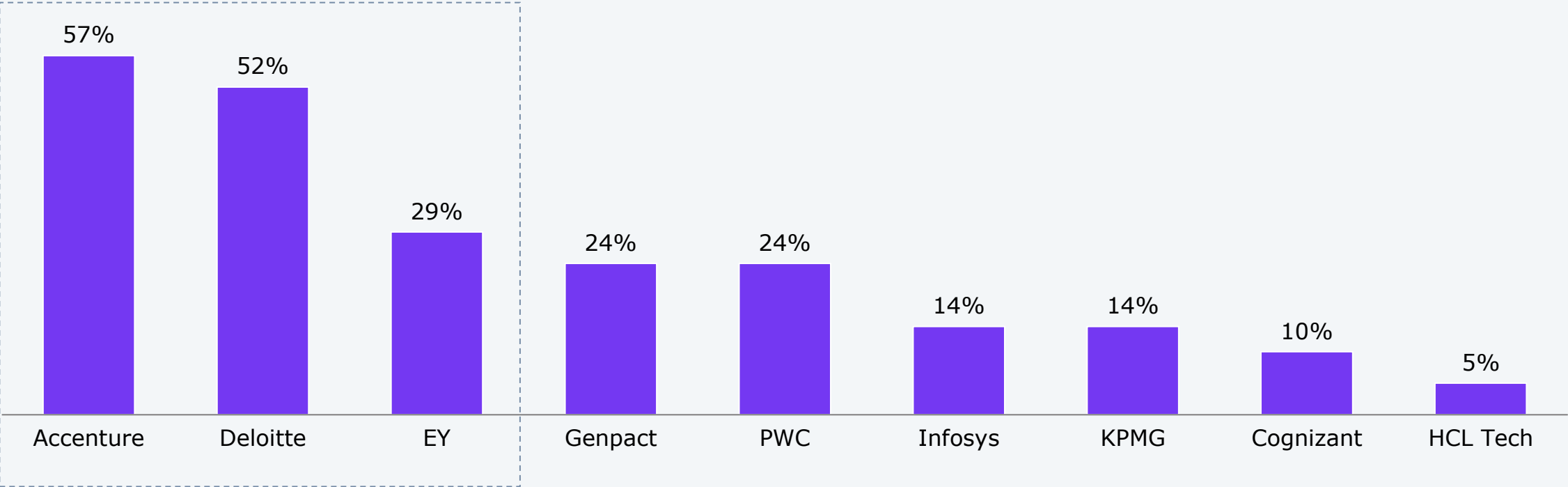
Sample size: 21 partner references
Source: HFS Research, 2025

Excerpt for Genpact

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

Excerpt for Genpact

4 Horizons results: Intelligent supply chain services, 2025

Excerpt for Genpact

Service providers covered in this report

accenture · BRISTLECONE · Capgemini · cognizant · Deloitte.

EY Shape the future with confidence · fractal · genpact · GEP INTELLIGENCE DRIVES INNOVATION · HCLTech

IBM · Infosys · ITC INFOTECH Business-friendly Solutions · KPMG · MINDSPRINT

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

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

Excerpt for Genpact

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

HORIZON 3—Market Leaders

INNOVATION SCOPE

AUTONOMOUS SUPPLY NETWORK

accenture
Capgemini
cognizant
EY Shape the future with confidence
genpact
Infosys
tcs TATA CONSULTANCY SERVICES

ECOSYSTEM TRANSFORMATION

HORIZON 2—Enterprise Innovators

CIRCULAR AND CROSS-ORGANIZATIONAL

BRISTLECONE
Deloitte.
HCLTech
IBM
KPMG
MINDSPRINT
TECH mahindra

BUSINESS TRANSFORMATION

HORIZON 1—Disruptors

OUTCOMES

fractal
GEP INTELLIGENCE DRIVES INNOVATION
ITC INFOTECH Business-friendly Solutions
pwc
virtusa
wipro

FUNCTIONAL TRANSFORMATION

VALUE ASPIRATION

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
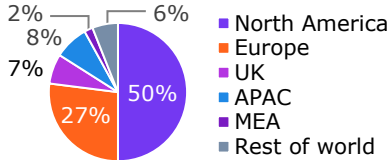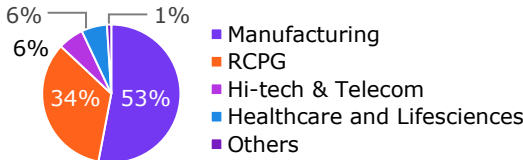
Service providers demonstrate

- 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

5

Genpact profile: Intelligent supply chain services, 2025

Excerpt for Genpact

Genpact: Dynamic, AI-optimized supply chain operations delivering measurable financial impact

HORIZON 3 – Market Leader
genpact

HORIZON 2 – Enterprise Innovator

HORIZON 1 – Disruptor

Strengths

- **Key differentiators:** Genpact has a well-established as-a-service operating model, technology capabilities, and offerings across planning, sourcing, order management, logistics, and aftermarket, along with a library of data-led use cases and managed services (e.g., control tower-as-a-service, order-as-a-service, planning-as-a-service). It has tech-trained talent across Kinaxis, Blue Yonder, ketteQ, ServiceNow, Microsoft, AWS, Databricks, and Celonis.
- **Technology innovation:** Genpact has developed packaged agents for demand and supply planning, sourcing, order orchestration, predictive logistics, and field support. It has made significant advancements in Genpact Order Assist 2.0 Agentic on Salesforce, inventory management, configuration agent, digital twins, and process mining overlays.
- **Key outcomes:** The firm built an integrated planning hub, saving €85 million for a global food and beverage major. It modernized E2E planning for a packaged and frozen foods major, unlocking over $50 million in savings. Other notable outcomes include a 10–20% CX improvement using Genpact Order Assist 2.0 Agentic for a life sciences client and a 25–35% cost-per-order reduction through improved truck utilization for an F&B company.
- **Client and partner kudos:** Clients acknowledge its outcome-based approach, while partners appreciate its technology expertise and operational experience.

Development opportunities

- **What we'd like to see more of:** Scale metrics for agents in production, including clearer penetration rates across order lines/planning exceptions and quantified agent-handled vs. human-handled volumes.
- **Opportunity in the next 12 months:** Boost the hyperscaler play such as Azure for frontline/field workflows, AWS for risk sensing and parts planning, and ServiceNow for supplier/value-chain workflows.
- **Clients and partner critique:** Clients expect a stronger presence in onsite locations and better hyperscaler alignment. Partners seek robust governance and effective account management.

Percentage of clients by major geography

- 2%, 8%, 7%, 6%, 27%, 50%
- North America — 50%
- Europe — 27%
- UK — 7%
- APAC — 8%
- MEA — 2%
- Rest of world — 6%

Revenue mix

- 6%, 6%, 1%, 34%, 53%
- Manufacturing — 53%
- RCPG — 34%
- Hi-tech & Telecom
- Healthcare and Lifesciences
- Others

Mergers and acquisitions (2023–2025)

- XponentL Data (2025): Accelerates AI-led innovation
- AI-Driven Smart Command Center in Japan

Partnerships

Kinaxis, ServiceNow, Salesforce, ketteQ, Microsoft, AWS, Prewave, Resilinc, Esker

Key clients

Number of supply chain clients: <Not disclosed>
Key clients:
- CDW
- Altera
- GE
- L'Oréal
- BD
- Coca-Cola
- Cardinal Health
- Rich's
- Vestas
- Danone
- Osmose
- Kraft Heinz
- Aldi
- AB InBev

Global operations and resources

Supply chain headcount: 19,500
Delivery and innovation centers:
- India (Bangalore, Chennai, Gurgaon, Hyderabad, Noida, Jaipur, Kolkata, Pune)
- US (Wilkes-Barre, Chicago, Richardson, Danville, New York, Atlanta)
- Europe (Munich, Bucharest, Katowice, London, Barcelona, Lisbon, Lublin, Wormer, Brno, Cluj, Budapest)
- LATAM (San Jose – Costa Rica; Guadalajara, Juarez, Monterrey – Mexico; Uberlandia – Brazil, Guatemala)
- APAC (Singapore, Kuala Lumpur, Bangkok, Manila, Dailan)

Flagship internal IP

- CSCRTM: Experience digital solution through Genpact Order Assist 2.0 Agentic for order management
- SCREIM: Supply chain resilience evaluation, integration, and monitoring platform to improve resilience across the supply chain
- Control Tower/Digital Twin: For enterprise-level visibility and alerts powered by AI
- Cora platform: AI-enabled sourcing and category management solution powered by internal technology and partners

6 HFS Research authors

Excerpt for Genpact

HFS Research authors

Ashish Chaturvedi
Executive Research Leader

ashish.chaturvedi@hfsresearch.com

Krupa KS
Senior Analyst

krupa.ks@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 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.

🌐 www.hfsresearch.com

in hfsresearch

💬 www.horsesforsources.com

🎙 www.horsesmouthpodcast.com