HFS horizons

HFS Horizons Report

Supply Chain Services, 2023

Covering the leading service providers in enterprise supply chain innovation

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Excerpt for Tech Mahindra

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The term “supply chain” is a misnomer for meeting the realities of today’s world. It connotes linear and constrained thinking. We need to break free. It’s time to unchain your supply chain.

Saurabh Gupta, President, Research and Advisory

“

The pandemic coerced enterprises to prioritize resilience in their supply chain management and modernization programs. They are achieving this by increasing supply chain visibility, limiting human intervention, and creating multiple fallback options at a process level, such as source-to-pay (S2P). This newfound focus transcends the traditional linear, albeit constrained, approach of supply chain management. Gradually, the industry is inching toward a connected, autonomous, sustainable, and collaborative supply chain paradigm.

Ashish Chaturvedi, Practice Leader

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1 Introduction and the HFS view of supply chain

Introduction

The health of most enterprise businesses depends on the strength of their supply chains. Today's enterprises are grappling with unprecedented challenges, including disrupted supply from hubs like China, heightened sustainability expectations, lack of resources, and increasing raw material and fulfillment costs. Service providers are helping enterprises to improve their inventory allocation through artificial intelligence (AI) and machine learning (ML) algorithms, optimize supplier management through dynamic supplier management systems, improve visibility by building advanced control tower solutions, and reduce people dependency by introducing automation across processes. The objective is that enterprises should be able to detect and react to "change" quickly, transforming from linear to circular to eventually autonomous supply chain networks.

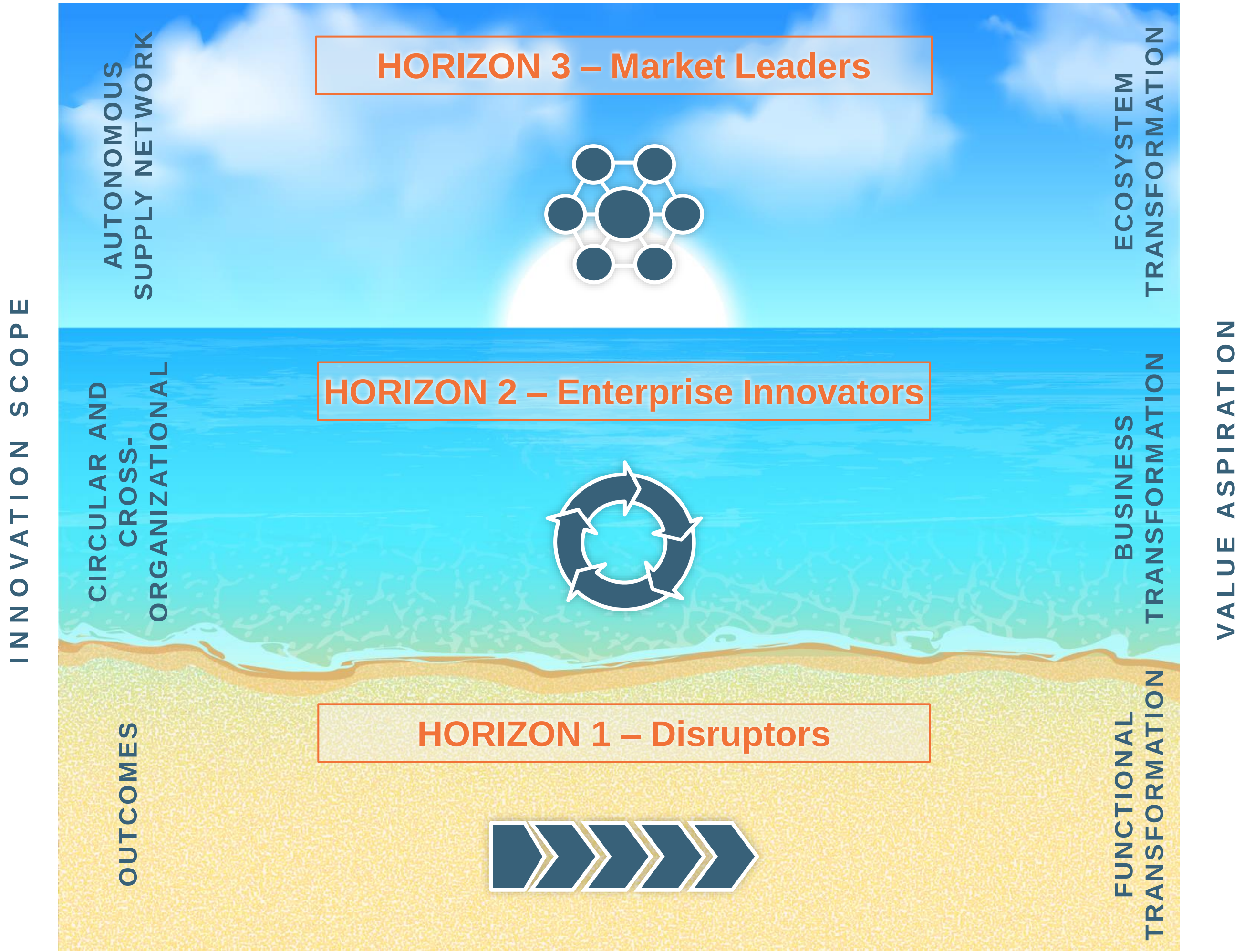
HFS Horizons Report: Supply Chain Services, 2023 assesses how well service providers are helping their **supply chain clients embrace innovation** and **realize value**.

- **Horizon 1:** **Linear supply chains** drive functional optimization outcomes within the supply chain through cost reduction, speed, and efficiency.
- **Horizon 2:** **Circular supply chains** have Horizon 1 attributes plus drive circular supply chains with a strong sustainability narrative and the ability to transform end-to-end supply chains, creating unmatched stakeholder experience with a "OneOffice" mindset.
- **Horizon 3:** **Autonomous supply networks** have Horizon 2 attributes plus a networked and autonomous vision of supply chain, driving completely new sources of value with a "OneEcosystem" approach.

This study evaluates the capabilities of **18** providers across the HFS definition of supply chain, based on a range of dimensions to understand the ***Why, What, How, and So What*** of their service offerings.

This highlights the **value-based positioning** for each participant across the three distinct horizons. It also includes **detailed profiles** of each service provider, outlining their **provider facts, strengths, and development opportunities.**

HFS Horizons, supply chain services, 2023
Aligning enterprise objectives with service provider value



Horizon 3 is the autonomous supply network

Service providers demonstrate Horizon 2 capabilities, plus

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

Horizon 2 is circular and cross-organizational

Service providers demonstrate Horizon 1 capabilities, plus

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

Horizon 1 is optimization and outcomes

Service providers demonstrate

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

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

Planning and design

- Strategic planning (demand, capacity, sales, and operations)
- Scenario simulation
- Network design
- MDM

Order management

- Order entry
- Order maintenance
- Order reporting
- Forecasting
- Demand planning and promotion management

Transportation management

- Shipping and freight requests
- Transportation strategy
- Carrier management
- Operating a 4PL
- Transportation planning

Inventory management

- Inventory strategy and forecasting
- Inventory reporting
- Replenishment ordering
- Spare parts planning
- CFPR across clients

Supply chain services

Enabling technologies

RPA, process mining, artificial intelligence, smart analytics, blockchain, IOT, cloud, mobility, 3D printing, mobility, 5G

Operating models

Shared services, outsourcing and offshoring, global business services, BPaas/SaaS/IaaS, CoE

Methodologies

Application development and maintenance, intelligence and decision-making, infrastructure management, security management, ERP, PLM

Supply chain sustainability

- Carbon footprint management
- Traceability and transparency
- Ethical sourcing vs modern slavery
- Reporting, legal, and compliance

Aftermarket services

- RMA management
- Approving returns
- Customer service
- Warranty management
- Control tower services

Procurement and sourcing

- Strategic sourcing
- Category management
- Contract management
- Supplier management
- Transactional procurement

2 Executive summary and market dynamics

Executive summary (page 1 of 2)

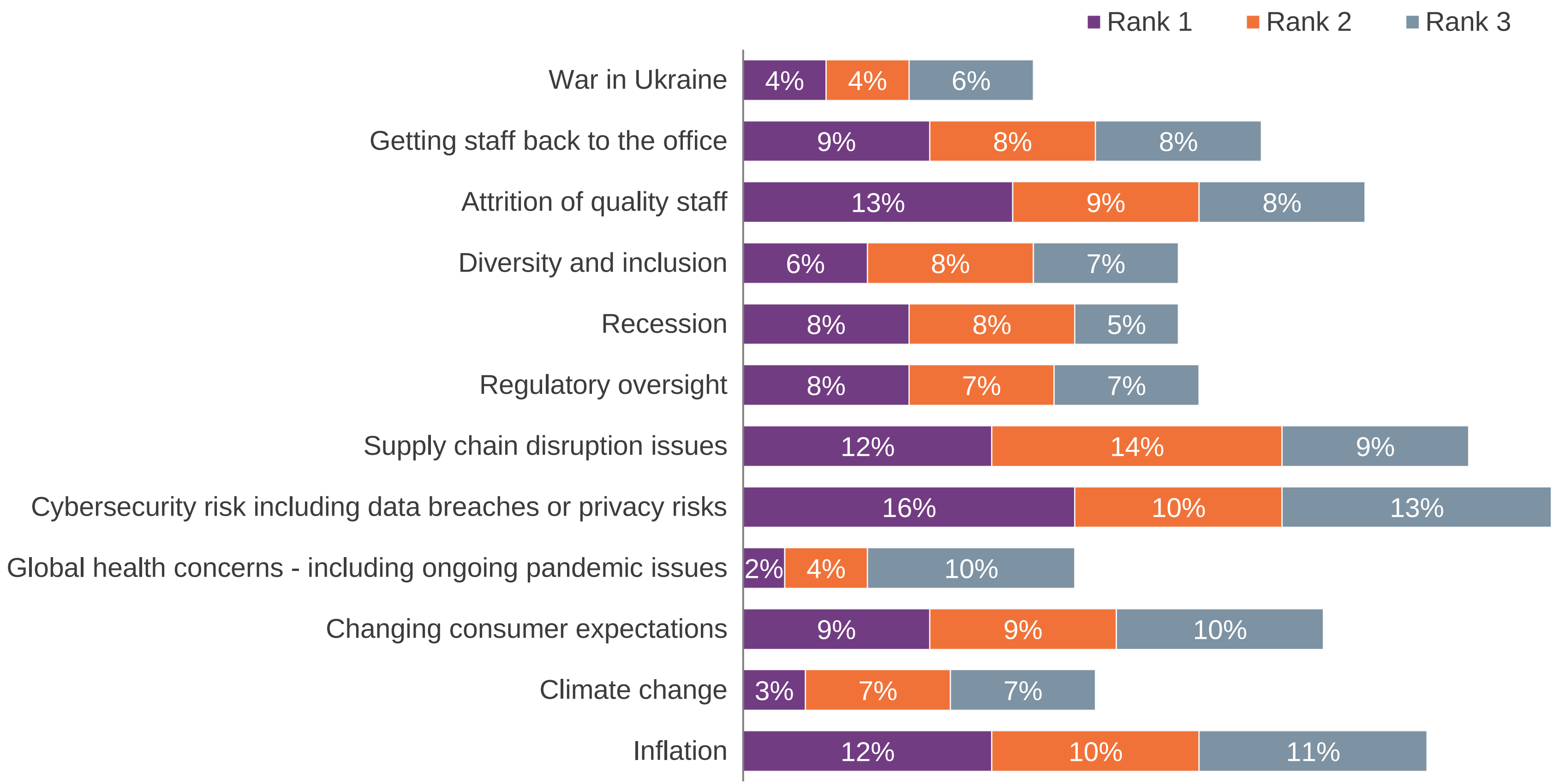
1	**What's happening?**	• Supply chain is no longer an operational conversation topic. It has become a boardroom discussion as supply chain disruptions form one of the top-three macro-environmental factors impacting enterprises. Building resilient supply chains, sourcing challenges, cybersecurity concerns, heightened sustainability demands, and talent drought are some of the biggest challenges enterprises grapple with. Nearly 80% of enterprises expect their supply chains to become more circular (Horizon 2) and networked (Horizon 3) in the next two years. While relatively few engagements include sustainability in the current scope, we expect strong growth in these services over the next two years. Third-party providers are primarily leveraged for supply chain planning and order and inventory management activities. A robust ecosystem of partners to deliver various supply chain services is emerging.
2	**Key observations**	• **The linear-circular-networked supply chain market vision is still nascent.** Although service providers attested to the hypothesis that linear supply chains would evolve to become circular and eventually autonomous networked chains, the current supply chain discourse pivots around visibility, resilience, and modernization. So, the hypothesis implicitly applies but is not an explicitly defined goal. • **Sustainability offerings have evolved but not baked into engagements.** More than two-thirds of the providers that participated in the study have formulated offerings around sustainable sourcing, circular economy, green logistics, and decarbonization metrics. Interestingly, most of the cases discussed were standalone sustainability engagements with a supply chain angle rather than the other way around. It came to light that enterprises are also putting a half-hearted effort into baking sustainability across the supply chain. • **Data is becoming central to supply chain transformation engagements.** Enterprises are spending on data generation and data capture at various supply chain process nodes. Industrial transformation with advanced robotics, IoT devices to track goods, additive manufacturing, and autonomous technology systems are coming into the fray. We are witnessing the advent of data-driven ecosystems with intra-industry data exchange programs like TransCelerate in the pharmaceutical industry. There's further uptake of blockchain technology to create decentralized, secure networks that are more transparent, thereby helping in activities like tracking the movement of goods or making transactions faster and smoother. • **Supply chain resilience has become the central theme of contemporary supply chain engagements.** Service providers are helping enterprises move from just-in-time to inventory overstock and single-supplier–single-country sourcing to multi-supplier–multi-country sourcing. Enterprise are also demanding more dynamic control tower solutions and a higher degree of automation in demand planning, warehousing, and fulfillment. The objective is to have more control and visibility of the supply chain to navigate unforeseen disruptions.
3	**Supply chain services providers—the winners revealed**	• **HFS assessed 18 leading supply chain service providers.** Of these 18 providers, six are positioned in Horizon 3 as leaders, nine in Horizon 2 as innovators, and three in Horizon 1 as disruptors. The services firms that lead the market and ecosystem-level change in Horizon 3 are Accenture, Capgemini, EY, IBM, TCS, Tech Mahindra. The services firms innovating across organizations and supply chains in Horizon 2 are Cognizant, Deloitte, Genpact, GEP, HCLTech, Infosys, KPMG, PwC, Wipro. The services firms disrupting and transforming business processes and functions in Horizon 1 are Atos, Hitachi Vantara, and Zensar.

Executive summary (page 2 of 2)

4	**Horizon 3 provider attributes**	• These providers demonstrated one or more of the following characteristics: – Working toward data-powered ecosystems. For example, Accenture is working with TransCelerate, to revolutionize digital data flow in the pharma industry. – Demonstrating co-innovation use cases. Almost all providers placed under Horizon 3 showcased partner or client co-innovation projects. – Horizon 3 prebuilt offerings. Working toward an autonomous networked supply chain, providers have built IoT-led, AI/ML-powered “always on” solutions.
5	**Horizon 2 provider attributes**	• These providers demonstrated one or more of the following characteristics: – Has an E2E supply chain offerings suite. – Has an integrated sustainability portfolio with real-world client examples. – Has a rich library of accelerators and proprietary tooling to expedite the client’s supply chain journey.
6	**Horizon 1 provider attributes**	• These providers demonstrated one or more of the following characteristics: – Effective point solutions catering to different aspects of supply chain like planning, sourcing, and fulfillment. – Outcomes with quantified benefits delivered to clients. – Partnerships with all leading specialist software vendors and cloud providers.
7	**Voice of the customer (VOC)**	• The 18 profiled providers received an average CSAT of 8.1 out of 10. The future goals of most clients include building a more cognitive and resilient supply chain and moving to more circular and networked operating models. They want service providers to bring in the best-of-breeds tools, consulting, and domain knowledge to make this happen.
8	**Voice of the partner (VOP)**	• Partners were delighted with their service providers, with a CSAT of 8.7 out of 10. Interestingly, less than a fourth felt that their service provider partner could drive an eco-system-driven play for unlocking new sources of value, concluding that “ecosystem creation” is yet to become a mainstream objective.

Supply chain is no longer an operational conversation; it is a boardroom discussion

What are the most concerning macro-environmental factors currently adversely impacting your organization's goals?



- Supply chain disruption ranked among the top three factors adversely impacting organizational goals.
- HFS conversations with IT and BPS providers also revealed that most of the businesses that ceased operations during the pandemic faced supply chain disruption.

Sample: 1,800 enterprise clients
Source: HFS Pulse, 2023

Top trends shaping the supply chain market

Raw material turmoil

Lockdowns in China, the Russia–Ukraine war, and a global economic slowdown have led to raw material shortages and price increases.

Cybersecurity needs ramping up

Increased remote work and increasing supply-chain digitization has made supply chains more prone to cyber attacks. About half of global firms are viewing cybersecurity as a prime operational challenge in the foreseeable future.

Heightened sustainability demands

Customer expectations and new regulations are compelling enterprises to use ethical labor practices, consciously source raw materials, apply green practices like eco-friendly fulfillment, and reduce carbon emissions across the supply chain.

Talent drought

There is a lack of skilled talent to build autonomous supply chains. There is limited Pi-shaped (experience in two related supply chain areas), comb-shaped (multi-domain multi-industry expertise), and T-shaped talent (broad knowledge of supply chain with expertise in one industry).

Focus on visibility and inbuilt agility

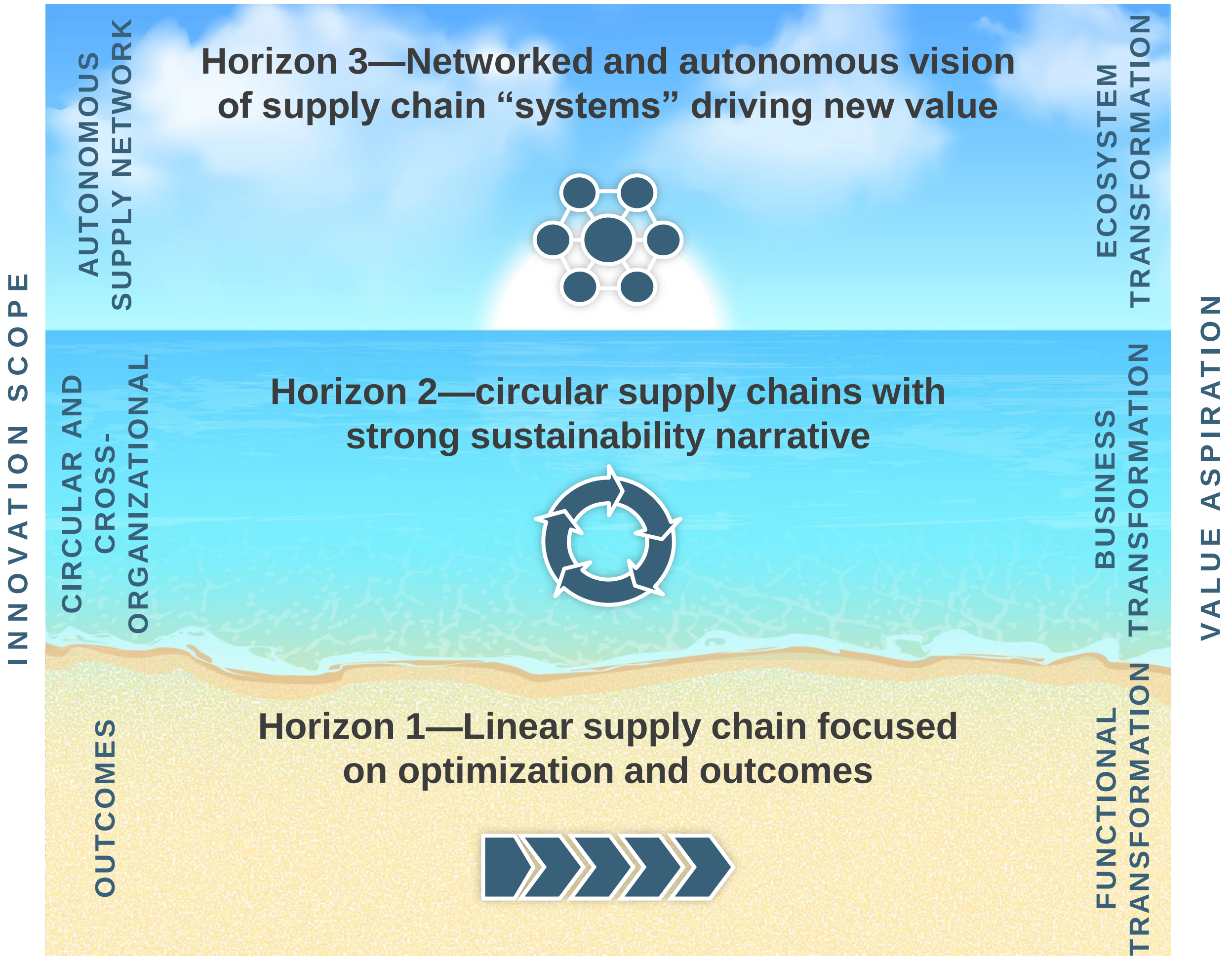
Enterprises are investing in tools and technologies for enhanced visibility, such as advanced control tower solutions and building decision-making agility, by infusing more automation into their demand planning solutions.

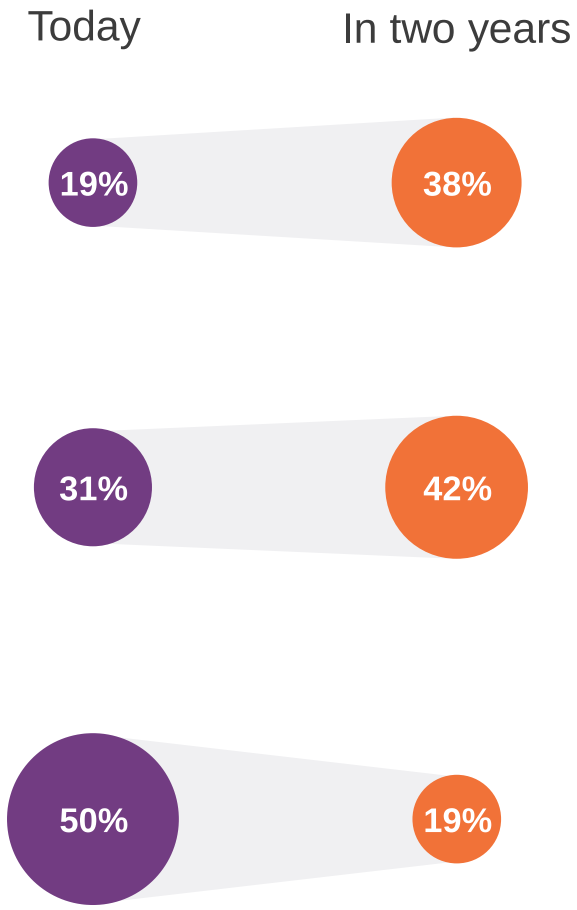
Building resilient supply chain

Most enterprises HFS interviewed are embracing cognitive tooling and emerging data analysis techniques to build supply chains that are least affected by blue swan events like the COVID-19 pandemic.

Nearly 80% of enterprises expect their supply chains to become more circular (Horizon 2) and networked (Horizon 3) in the next two years

Which of the following statements best represents the primary value delivered by your service provider today and in two years?





Source: 30 supply chain leaders surveyed and interviewed by HFS Research as reference clients of the 18 services firms in this study

Enterprises are leveraging third-party providers primarily for supply chain planning and order and inventory management

54%

Planning and design

- Strategic planning (demand, capacity, sales, and operations)
- Scenario simulation
- Network design
- MDM

54%

Order management

- Order entry
- Order maintenance
- Order reporting
- Forecasting
- Demand planning and promotion management

27%

Transportation management

- Shipping and freight requests
- Transportation strategy
- Carrier management
- Operating a 4PL
- Transportation planning

50%

Inventory management

- Inventory strategy and forecasting
- Inventory reporting
- Replenishment ordering
- Spare parts planning
- CFPR across clients

Supply chain services

Enabling technologies
RPA, process mining, artificial intelligence, smart analytics, blockchain, IOT, cloud, mobility, 3D printing, mobility, 5G

Operating models
Shared services, outsourcing and offshoring, global business services, BPaas/SaaS/IaaS, CoE

Methodologies
Application development and maintenance, intelligence and decision-making, infrastructure management, security management, ERP, PLM

Supply chain sustainability

- Carbon footprint management
- Traceability and transparency
- Ethical sourcing vs modern slavery
- Reporting, legal, and compliance

15%

Aftermarket services

- RMA management
- Approving returns
- Customer service
- Warranty management
- Control tower services

12%

Procurement and sourcing

- Strategic sourcing
- Category management
- Contract management
- Supplier management
- Transactional procurement

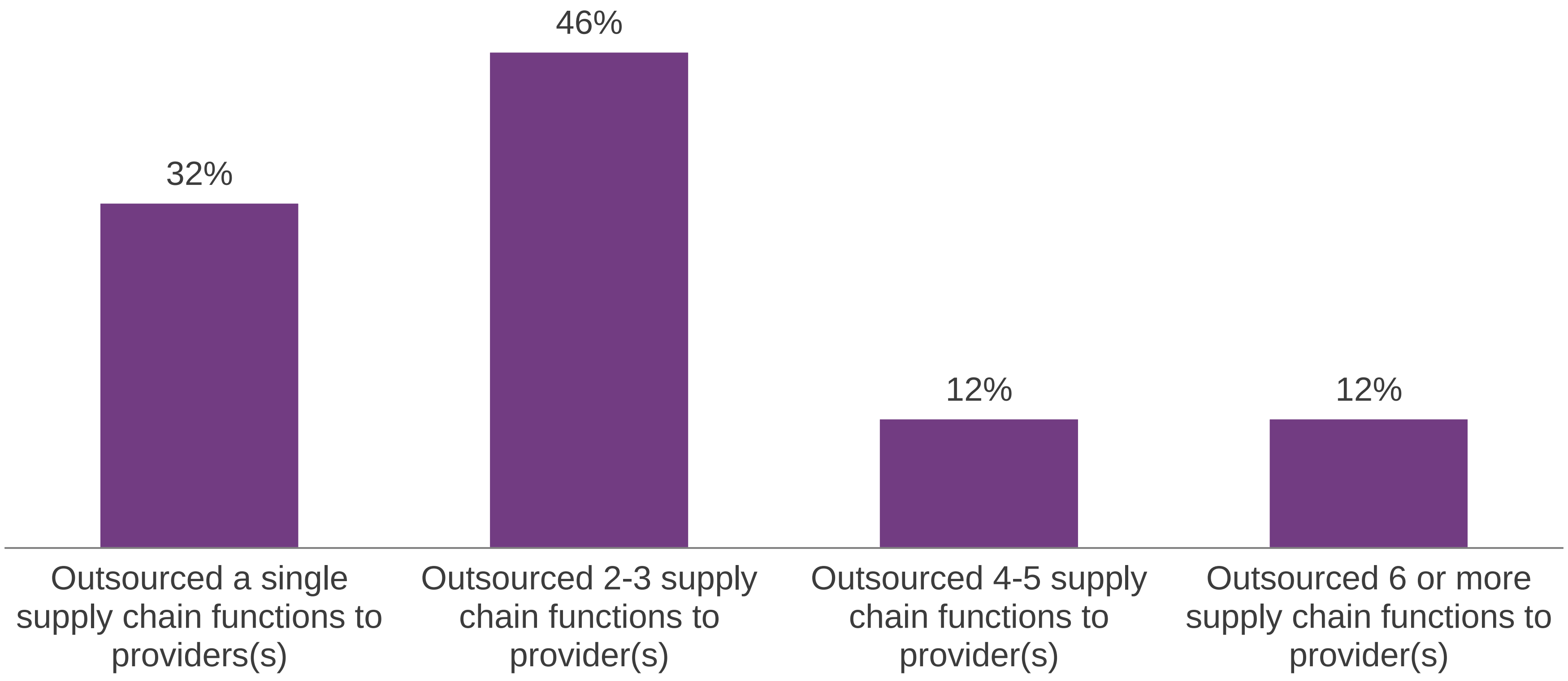
35%

While relatively few engagements include sustainability in the current scope, we expect strong growth in these services over the next two years.

Enterprises are leveraging third-party service providers on a piecemeal basis, and end-to-end supply chain engagements are "rare"

Most enterprises retain functions such as aftermarket services, quality management, and operations streamlining. Most providers don't seem to have mature offerings in these areas.

Percentage of enterprises

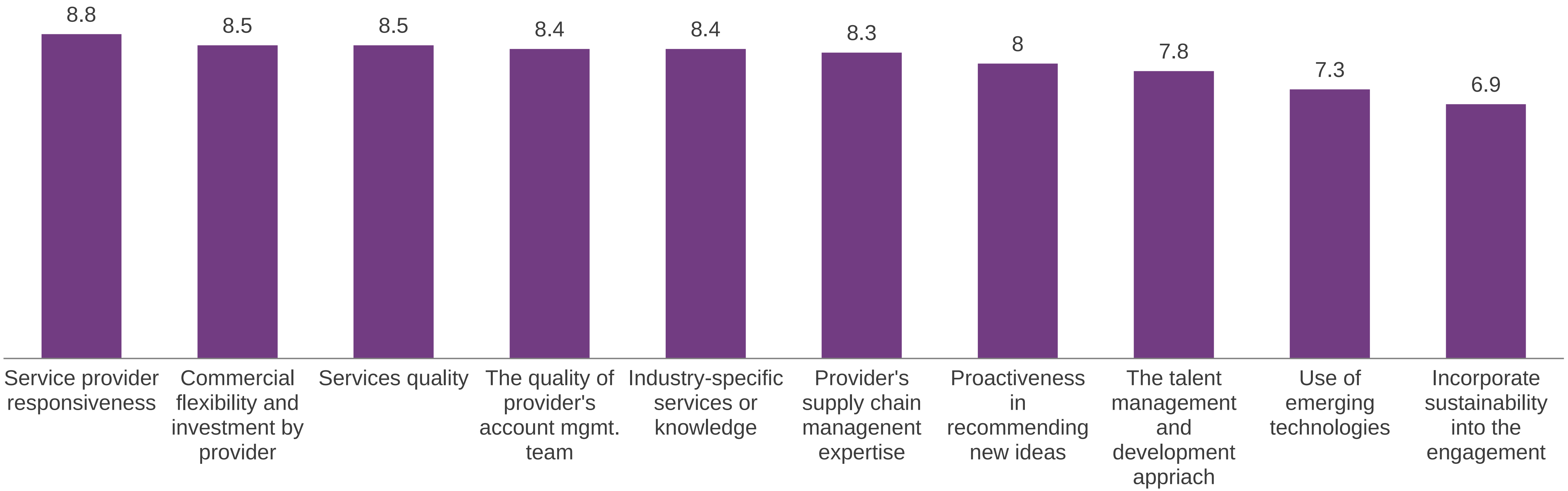


Source: 26 supply chain leaders surveyed and interviewed by HFS Research as reference clients of the 18 services firms in this study

Enterprises are overall satisfied with service providers; incorporating sustainability and using emerging tech were major improvement areas

Although most service providers have built sustainability portfolios across the supply chain, the penetration remains low. Enterprises are equally to be blamed.

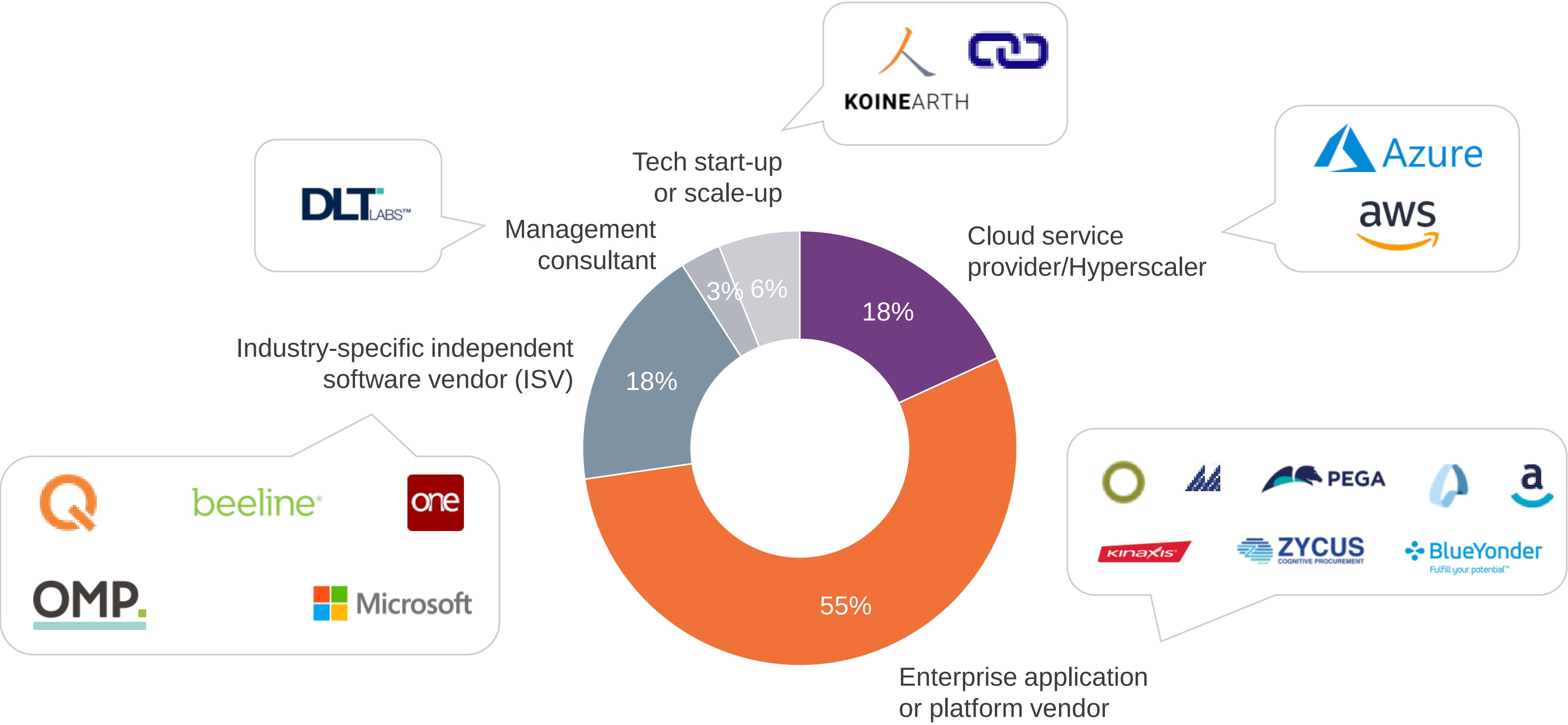
CX Scores



Source: 30 supply chain leaders surveyed and interviewed by HFS Research as reference clients of the 18 services firms in this study

A robust partner ecosystem delivering supply chain services is emerging

Which of the following statements best describes your firm?



Please note: Partner firms selected the category in play
Source: 33 partners surveyed and interviewed by HFS Research as references for the 18 services firms in this study

3 Research methodology

Service providers covered in this report

Note: All service providers are listed alphabetically

Sources of data

This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on supply chain services providers in our study. Sources are as follows:

Briefings and supporting information

HFS conducted detailed **briefings** with supply chain leadership from each provider.

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

Reference checks

We conducted detailed reference surveys and interviews with **30 active clients and 34 ecosystem partners** of the study participants.

HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh data from the field via the HFS Pulse Study in Q1 2023 featuring **approximately 1,200 service provider ratings from various enterprises.**

Other data sources

Public information such as press releases and websites.

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

Horizons assessment methodology—supply chain services

The **HFS Horizons Report: Supply Chain Services, 2023** report 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 is based on inputs from clients and partners, augmented with analyst perspectives. The following illustrates how we assessed provider capabilities:

Distinguishing supplier characteristics

Assessment dimension	Description	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The Why? **(25%)**	Strategy and vision for supply chain and supply chain services Supply chain offerings aligned to top problem statements for the sector Competitive differentiators	• Ability to drive **functional digital** transformation by driving cost reduction, speed, and efficiency	• Horizon 1 + • Driving **circular supply chains** with a strong sustainability narrative and the ability to transform end-to-end supply chain creating unmatched stakeholder experience with a "OneOffice" mindset	• Horizon 2 + • **Networked and autonomous vision of supply chain** driving completely new sources of value with a "OneEcosystem" approach
Execution and innovation capabilities: The What? **(25%)**	Breadth and depth of services across the end-to-end supply chain New and differentiated offerings Sustainability strategy, narrative, ambition, and percentage of engagements involving sustainability goals and outcomes Strength of supply chain services ecosystem (depth and breadth of supply chain-oriented partnerships) Strength of talent pool (delivery centers, experience, certifications, training program) Supply chain technology innovation (use cases and level adoption of emerging technology) Intellectual property and proprietary frameworks	• Strong areas of excellence within the supply chain • Primarily focused on either technology services or business services • Emerging sustainability narrative • Offshore-focused with strong technical skills and supply chain • Emerging ecosystem of partners • Adequate coverage across the supply chain	• Horizon 1 + • Ability to support clients on their end-to-end supply chain transformation journey • Well-defined sustainability offering • Global delivery presence • Well-rounded capabilities across all value creation levers: talent, domain, technology, data, sustainability, and change management • Supply chain-specific partnerships	• Horizon 2+ • Supply chain strategy and execution capabilities at scale • IT and business services capabilities with strong consulting skills • Ability to influence systemic change across the global sustainability context • Robust ecosystem of partners integrated into the offerings • Differentiated IP, frameworks, and technology assets
Go-to-market strategy: The How? **(25%)**	Nature of investments (M&A, R&D, others) Co-creation with customers and co-development with partners Innovative commercial structures	• Established supply chain practice • Clearly defined go-to-market strategy • Mainly effort-driven client relationships	• Horizon 1 + • Ability to bring together all capabilities of the organization in an easy to understand and simple to consume way • Supply chain-specific investments • Outcome-driven client relationships	• Horizon 2+ • Market leading internal and external investments • Driving co-creation with clients and partner ecosystem • Purpose-led relationships driving growth and innovation for clients
Market impact: The So What? **(25%)**	Scale and growth of supply chain services (customers, revenue) Demonstrable client case studies (multi-industry, magnitude, nature of outcomes) Voice of the customer	• Referenceable and satisfied clients • Strong execution credentials • Primarily a vendor-client relationship	• Horizon 1+ • Referenceable and satisfied clients for ability to innovate and execute • Strategic partner	• Horizon 2 + • Referenceable and satisfied clients driving new business models • Perceived as a thought leader

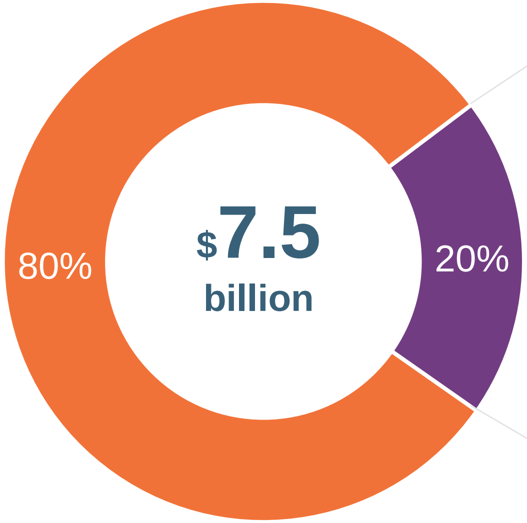
4 Horizons results: Supply Chain Services, 2023

The supply chain services market is growing at 17% annually, with an estimated annual business of $7.5 billion

Supply chain consulting, technology, and services market (HFS estimate)

$6 billion

HFS Research estimate of the remaining supply chain consulting, technology, and business services market: considering pure consultancies, cloud, platform and technology firms, and engineering and other business services firms.



$1.5 billion

The supply chain consulting, technology, and business services revenue of the leading 18 firms in this market analysis

The analysis of the 18 services firms in this study

$1.50 billion

Average dedicated supply chain services revenue

17%

YOY growth in 2022 of the 18 leading providers' supply chain services revenues

15,200

Average dedicated supply chain services headcount

14%

YOY growth in 2022 of the 18 leading providers' supply chain services headcounts

1,260

Average number of dedicated supply chain services clients

13%

YOY growth in 2022 of the 18 leading providers' supply chain services number of clients

Note: Market size is estimated based on the financial numbers shared by participating service providers. Note: Market size is estimated based on the financial numbers shared by participating service providers.

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

Providers (alphabetical order)	**HFS point of view**
Accenture	Delivers to the entire value chain with an eco-system-driven focus
Atos	Digital supply chain solutions focused on efficiency gains along the process
Capgemini	"Ecosystem coordinator" approach plus a full supply chain portfolio from advisory to physical engineering
Cognizant	Reengineering business processes and digitizing platforms
Deloitte	Comprehensive approach combining industry expertise and modern technologies
EY	A consulting-driven delivery approach with proven co-innovation outcomes
Genpact	Sustainability, consulting, and technology coupled with historic business process services scale and experience
GEP	A specialist supply chain firm with consulting, managed services, and software offerings
HCLTech	Digital solutions with consistent positive feedback on commercial models and co-innovation

Providers (alphabetical order)	**HFS point of view**
Hitachi Vantara	Delivers end-to-end visibility through advanced analytics, AI, and IoT technologies
IBM	Excels in consulting, data analytics, automation, and cloud expertise in supply chain
Infosys	Consulting-led holistic coverage of the supply chain
KPMG	Offers an array of sustainable, secured digital supply chain solutions
PwC	Focus on high-value outcomes with a global, industry-focused team and technology investment
TCS	A consulting-driven delivery approach with proven co-innovation outcomes
Tech Mahindra	Technology strength coupled with several new domain-specific acquisitions
Wipro	End-to-end supply chain solutions leveraging advanced technologies, industry expertise, and global partnerships
Zensar	Excels in delivering quantifiable gains through a project-based delivery approach

HFS Horizons—Supply chain service providers, 2023

Horizon 3 is the connected supply system

Service providers demonstrate Horizon 2 capabilities, plus

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

Horizon 2 is circular and cross-organizational

Service providers demonstrate Horizon 1 capabilities, plus

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

Horizon 1 is optimization and outcomes

Service providers demonstrate

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

5

Tech Mahindra profile: Supply Chain Services, 2023

Tech Mahindra: Technology strength coupled with several new domain-specific acquisitions

Strengths

- **Value proposition:** Tech Mahindra's SCM NXT.NOW philosophy aims to move supply chains from being a cost and efficiency function to a value and innovation function.
- **Growth proof points:** Proof points include Tech Mahindra's recent acquisitions focus on various facets of the supply chain, $300 million in acquisitions, and internal training efforts.
- **Key differentiators:** Demonstrated collaboration throughout supply chain engagements. Engineering, technology, and platform form the backbone of the company philosophy.
- **Outcomes:** Re-designed supply chain for a pharma company with sustainability benefits, eliminated paper consumption, saving 60,000 trees per year. Executed E2E supply chain business process re-engineering for a telecom major, leading to a 30% increase in operational excellence.
- **Customer kudos:** Applauded for flexible contracting, breadth of offerings, and depth of client environment understanding.

Development opportunities

- **What we'd like to see more of:** Enter or work with industry alliances on data-related collaboration. For example, TransCelerate in the pharma industry.
- **Customer critiques:** Should proactively develop the emerging-tech stack across supply chain processes.
- **Partner critiques:** Focus on replicating success throughout client engagements.

Key offerings

- Plan and execute: ML-based demand planning, S&OP and order management on COTS, scenario planning and network design, B2X Marketplace
- Source: Spend optimization, supplier risk mitigation and diversification, process mining and automation, BPaaS sourcing and procurement
- Contract: Blockchain-based smart contracting solution, AI-based contract lifecycle management solution, third-party risk management
- Delivery: Smart warehouse management, track and trace, cross-border customs brokerage using blockchain, digital fleet management
- Service: D2C strategy, omnichannel customer engagement, FieldOps on AR/VR, warranty, recall and returns management
- Control tower: Digital thread and twin, control towers for field services, operations, logistics and sustainability

Mergers and acquisitions (2019–2023)

- Plan and execute: BORN Group and Comviva
- Delivery: Perigord, Comviva
- Service: Zen3, MadPow, B!O Agency, and Tech Mahindra Altavec
- Control tower: Tech Mahindra Altavec

Partnerships

- SAP, Salesforce, Oracle, Microsoft
- Blue Yonder, Kinaxis, Coupa, MIRAKL
- GEP, DLT Labs, ResilInc
- TADA NOW, One Network, Optessa, IFS

Key clients

Number of clients 700+ in North America (48%), EMEA (26%), ANZ (3%), ROW (23%)

Key clients

- Among the top leading international airports; Canadian airlines; global telcos, manufacturers, pharmas; European tire firm; ANZ telco

Global operations and resources

Headcount 14,521 across

- 290 offices
- 108 countries
- 84 development centers
- 20 labs

Flagship internal IP

- iSCAN: Supplier onboarding simplification
- GLAMS AMS Suite: Workflow and documents
- Idecisions: Analytics and AI/ML across SC
- i.sustain: Maintaining ESG data for vendors
- SC traceability on blockchain
- IP with airline client: "Uptime as a service"

6 HFS Research authors

HFS Research authors (page 1 of 2)

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Ashish Chaturvedi is a Practice Leader at HFS covering supply chain, retail & CPG, and disruptive technologies. Ashish is an accomplished IT industry analyst and a member of the IDG Influencer Network. With over 13 years of technology research experience, Ashish has authored more than 70 research reports spanning retail technologies, enterprise modernization, low-code/no-code development, digital benchmarking, and IT sourcing.

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

Saurabh Gupta

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

As an analyst, Saurabh leads our coverage for horizon 3 change agents such as blockchain, business services (such as finance and accounting and supply chain), and industry services including healthcare and life sciences. Saurabh also analyses overarching and cross-cutting themes under the OneOffice concept like digital change management.

HFS Research authors (page 2 of 2)

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Josh Matthews is a Chief Sustainability Officer and Practice Leader at HFS, based in Cambridge, UK. Josh leads HFS's coverage of sustainability and the energy and utilities industries, built on academic and industry expertise across chemical engineering, management, and sustainability. Josh also focuses on supply chain, the TMT (telecom, media, and technology) industry, and the HFS Triple-A Trifecta of automation, analytics, and AI segments. Other subjects of interest and coverage include quantum computing and diversity and inclusion (D&I). Previously, he has covered the internet of things (IoT) and manufacturing.

About HFS

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