

Supply Chain Services

How enterprises modernize, orchestrate and manage risks to build resilient supply chains

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Providers are combining modernization, orchestration and governance to build resilient supply chains

This ISG Provider Lens® study benchmarks providers in the supply chain services market as enterprises navigate accelerated transformation. The assessment focuses on how providers enable the modernization of core supply chain operating models, the adoption of intelligent orchestration and control tower capabilities and the integration of GRC. It evaluates how providers help enterprises treat supply chains as strategic business assets that influence CX, business continuity, profitability and competitive differentiation by combining AI-enabled operations, real-time ecosystem orchestration and proactive governance to deliver superior outcomes, resilience and long term value.

Market context

Supply chains continue to experience unprecedented levels of complexity and disruption. Geopolitical instability, regional conflicts, evolving trade policies, inflationary pressures, labor shortages and evolving customer expectations have exposed the weaknesses in traditional supply chain operating models. At the same time, enterprises face increasing pressure to improve service levels, optimize inventory positions, reduce costs, strengthen sustainability performance and increase responsiveness to market changes. These forces have collectively elevated supply chain transformation from an operational initiative to a strategic business imperative.

In response, supply chain transformation priorities now extend beyond process improvement to include planning, sourcing, procurement, manufacturing support, logistics, inventory management, supplier collaboration, risk management and sustainability governance.

The future of supply chain transformation is at the **intersection of modernization, orchestration and governance.**



Executive Summary

The emergence of AI, ML, advanced analytics, automation and agentic AI has further accelerated market evolution. These technologies are no longer viewed as standalone innovations but as foundational enablers of modern supply chain operations. Providers are increasingly implementing AI to improve forecasting accuracy, demand sensing, inventory optimization, supplier collaboration, logistics planning and risk prediction. As a result, technology adoption is becoming closely linked to measurable business outcomes rather than solely digital transformation objectives.

Market developments also reveal a growing convergence between operational excellence, ecosystem orchestration and governance. Enterprises are demanding visibility across multi-tier supplier networks, proactive risk monitoring and stronger compliance controls alongside efficiency improvements, rather than solely real-time visibility. Consequently, successful supply chain transformation initiatives are increasingly characterized by balanced investments in modernization,

orchestration and governance capabilities rather than isolated technology deployments.

Enterprise priorities

Enterprises continue to prioritize efficiency, resilience, visibility and agility. Providers are responding with integrated transformation programs that combine domain expertise, digital platforms, AI-enabled decision intelligence and managed services. This approach is driving a shift from function-specific optimization toward connected operating models that expedite decision-making, strengthen governance and improve collaboration within ecosystems.

Supply chain operations modernization

The strongest enterprise investment priorities remain focused on modernizing core supply chain operations. Organizations continue to face challenges stemming from fragmented processes, disconnected systems, inaccurate forecasting, inventory inefficiencies and limited agility. In response, they are modernizing planning, sourcing, logistics, inventory

management and fulfillment to improve scalability, responsiveness and business performance.

Enterprises increasingly seek integrated planning environments that enable scenario-based decision-making, demand sensing, inventory optimization and cross-functional collaboration. Modernization efforts now extend beyond process redesign to include cloud-enabled transformation, digital supply chain platforms, hyperautomation and embedded intelligence across workflows.

Buyers also expect measurable outcomes. Improvements in working capital, service levels, inventory performance and productivity have become key success metrics. As a result, providers are increasingly aligning engagements with outcome-driven value realization models rather than focusing solely on technology implementation milestones.

Intelligent orchestration and control tower services

A second major priority is establishing end-to-end visibility and orchestration capabilities.

Enterprises recognize that isolated functional optimization is insufficient in interconnected supply chain ecosystems. Instead, they seek real-time visibility across planning, procurement, manufacturing, logistics, suppliers and distribution networks to improve decision quality and responsiveness.

Control towers have emerged as a central mechanism for achieving these objectives and are evolving from visibility platforms into intelligent orchestration hubs that combine analytics, AI, automation, digital twins and predictive intelligence. This evolution reflects a broader shift toward decision intelligence. Organizations seek partners that can accelerate decision cycles, improve cross-functional coordination and enable ecosystem-wide collaboration. Consequently, intelligent orchestration has become a key differentiator for providers, with investments focused on visibility, decision automation, ecosystem connectivity and real-time performance management.



Supply chain GRC services

GRC considerations have become equally important to supply chain transformation. Enterprises operate amid geopolitical uncertainty, evolving regulations, sustainability reporting requirements, supplier concentration risks and heightened stakeholder scrutiny. As a result, they are prioritizing resilience and governance alongside operational performance. Organizations seek increased supplier visibility, enhanced risk management, proactive disruption monitoring and governance structures that support strategic decision-making. Providers are increasingly integrating risk sensing, compliance management, supplier governance and sustainability monitoring into broader transformation initiatives, recognizing that governance and resilience are foundational to modern supply chain operations. In parallel, sustainability and ESG considerations are increasingly embedded within supply chain strategies and governance programs globally.

Provider dynamics

Provider investments reveal strong convergence around several strategic themes. The first is the expansion of AI and GenAI capabilities across the supply chain value chain. Rather than positioning AI as a standalone innovation, providers increasingly embed intelligence into planning, procurement, logistics, supplier management, inventory optimization and compliance workflows. This approach reflects growing buyer interest in decision support capabilities that can improve operational effectiveness while reducing manual effort. The second major trend is the convergence of consulting, platform implementation and managed services as enterprises seek integrated transformation journeys. Providers are strengthening capabilities that combine advisory services, digital assets, operational delivery, analytics and continuous improvement within unified portfolios.

The third trend is the growing emphasis on orchestration platforms and control tower solutions. Providers increasingly position these capabilities as strategic operating layers that connect planning, execution, supplier ecosystems and risk management activities. Investments in real-time visibility, predictive analytics, ecosystem collaboration and autonomous decision support suggest that orchestration is rapidly becoming a core battleground for market differentiation. Finally, providers continue to expand capabilities related to governance, resilience and compliance. In addition to traditional risk management services, providers increasingly emphasize disruption management, supplier risk intelligence, sustainability programs, trade compliance and resilience engineering. This shift reflects a growing recognition among enterprises that operational performance and business continuity are interconnected objectives in modern supply chains. Across quadrants, what are providers doing to deliver on key enterprise requirements?

Supply chain modernization services:

Providers are increasingly supporting modernization initiatives through AI-enabled planning platforms, automation-led process transformations, cloud-based operating models and industry-specific accelerators that help improve forecasting accuracy, inventory performance and supply chain responsiveness.

Intelligent orchestration and control tower services: Providers are enhancing control tower offerings with scenario modeling, disruption monitoring, predictive alerts and exception management capabilities that enable enterprises to move from reactive responses to proactive intervention. Many providers are expanding traditional visibility solutions into intelligent orchestration platforms that combine real-time monitoring, predictive analytics, scenario modeling and automated decision support to improve cross-functional coordination and response management.

Supply chain risk, resilience and compliance services: Providers are increasingly embedding supplier risk intelligence, sustainability monitoring, compliance automation and



governance frameworks into broader transformation programs to help organizations strengthen resilience while addressing evolving regulatory and reporting requirements.

Key trends observed and other observations

Financial outcomes are becoming the primary measures of supply chain transformation

Across provider RFIs and client engagements, value realization is increasingly framed through financial metrics such as inventory reduction, working capital optimization, revenue protection and productivity improvements rather than technology deployment alone. Growing CFO involvement, economic uncertainty and increased board scrutiny are pushing organizations to prioritize initiatives that deliver measurable business outcomes. As a result, providers are aligning transformation programs more closely with quantifiable value creation and operational impact.

Operating model reinvention is becoming the starting point of modernization

Providers are increasingly leading transformation programs that prioritize

operating model redesign before technology implementation, focusing on planning structures, governance frameworks, decision rights, service models and process standardization. This shift reflects the reality that many organizations struggle less with technology limitations than with fragmented operating models shaped by acquisitions, regional variations and legacy practices. Consequently, the market is moving from system modernization toward broader supply chain operating model modernization.

Control towers are expanding from functional management to enterprise orchestration

The scope of control towers is expanding beyond individual functions such as logistics and transportation to include planning, procurement, manufacturing, inventory, fulfillment and supplier collaboration. Providers are creating orchestration layers that coordinate decisions across systems, functions and stakeholders rather than optimizing isolated processes. This evolution reflects the growing need for enterprise-wide decision

coordination in increasingly interconnected supply chain environments.

AI adoption is focusing on exception management over autonomous supply chains

Despite significant investments in AI, most enterprise adoption remains focused on augmenting human decision-making rather than enabling fully autonomous supply chains. The strongest use cases center on risk sensing, demand sensing, exception identification, root cause analysis, alert prioritization and recommendation generation. Organizations continue to rely on human oversight for critical decisions, indicating that the market is advancing toward AI-assisted supply chains rather than AI-operated supply chains.

Outlook

Over the next two years, the supply chain services market is expected to continue its evolution toward increasingly autonomous, intelligence-driven operating models. Supply chain modernization efforts will remain critical as enterprises seek to optimize performance

through AI-enabled planning, automation and digital platforms. However, modernization alone is unlikely to deliver sustained competitive advantage. Future success will depend on how effectively organizations combine operational improvements with orchestration and governance capabilities.

Control towers and orchestration platforms are expected to become strategic hubs for decision intelligence, enabling enterprises to manage complexity through predictive analytics, real-time visibility and ecosystem-wide coordination. At the same time, governance and risk management capabilities will continue to gain importance as regulatory and sustainability requirements expand and supply chain disruptions persist.

The providers best positioned for success will be those capable of modernizing operations, orchestrating ecosystem-wide activities and strengthening governance frameworks through a unified value proposition.



Executive Summary

As these priorities converge, the competitive landscape will increasingly favor providers capable of transforming supply chains into intelligent, resilient and continuously adaptive business networks that generate measurable and sustainable business value.

The market is increasingly rewarding providers that can integrate modernization, orchestration and governance into a unified transformation framework. Clients no longer view these capabilities as independent initiatives; they increasingly expect coordinated solutions that improve efficiency, visibility, resilience and compliance.





Provider Positioning

Page 1 of 3

	Supply Chain Operations Modernization Services	Intelligent Supply Chain Orchestration and Control Tower Services	Supply Chain Risk, Resilience and Compliance Services
Accenture	Leader	Leader	Leader
Andersen Consulting	Contender	Contender	Contender
Argano	Rising Star ★	Rising Star ★	Product Challenger
Atos	Not In	Product Challenger	Not In
Birlasoft	Product Challenger	Product Challenger	Contender
Bristlecone	Leader	Rising Star ★	Product Challenger
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Leader
Corbus	Contender	Not In	Not In
Cybage	Contender	Not In	Not In
Deloitte	Leader	Leader	Leader





Provider Positioning

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	Supply Chain Operations Modernization Services	Intelligent Supply Chain Orchestration and Control Tower Services	Supply Chain Risk, Resilience and Compliance Services
Exed Consulting	Contender	Contender	Contender
EXL	Product Challenger	Product Challenger	Product Challenger
EY	Product Challenger	Product Challenger	Leader
Genpact	Leader	Leader	Leader
GEP	Leader	Product Challenger	Not In
HCLTech	Leader	Leader	Not In
IBM	Product Challenger	Product Challenger	Product Challenger
Infosys	Leader	Leader	Leader
KPMG	Product Challenger	Market Challenger	Market Challenger
LTM	Not In	Leader	Not In
Maine Pointe	Market Challenger	Contender	Contender





Provider Positioning

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	Supply Chain Operations Modernization Services	Intelligent Supply Chain Orchestration and Control Tower Services	Supply Chain Risk, Resilience and Compliance Services
MHP	Rising Star ★	Not In	Not In
Neo Tangent	Contender	Not In	Not In
NTT DATA	Product Challenger	Product Challenger	Product Challenger
PwC	Product Challenger	Product Challenger	Product Challenger
TCS	Leader	Leader	Leader
Tech Mahindra	Product Challenger	Product Challenger	Product Challenger
Visionet Systems	Product Challenger	Contender	Not In
Wipro	Leader	Leader	Leader
Zensar Technologies	Product Challenger	Contender	Contender



Key focus areas of the end to end supply chain services 2026 study, covering **modernization, orchestration and risk led resilience.**

Simplified Illustration Source: ISG 2026

Supply Chain Operations Modernization Services

Intelligent Supply Chain Orchestration and Control Tower Services

Supply Chain Risk, Resilience and Compliance Services

Definition

Global supply chains are undergoing a fundamental change. Persistent volatility, geopolitical disruptions, regulatory pressures and rapid advances in AI are compelling enterprises to rethink the way supply chains are designed, coordinated and secured. Point solutions and siloed initiatives are no longer sufficient; enterprises are investing in services to bring about end to end transformation, real time orchestration and systemic resilience.

The Supply Chain Services 2026 study examines how enterprises are currently procuring supply chain services and how providers are responding to this demand. It reflects distinct but vertically aligned purchasing motions that are now defining the market:

Modernization

- Redesigning supply chain operating models
- Re architecting processes, data and decision frameworks
- Enabling AI driven, connected and resilient operations

Intelligent Orchestration

- Coordinating decisions across planning, logistics, inventory and suppliers
- Using control towers, AI and automation for real time execution
- Improving responsiveness, service levels and agility

Risk, Resilience and Compliance

- Anticipating and mitigating geopolitical, supplier, climate and regulatory risks
- Embedding compliance, governance and assurance into supply chain decisions
- Protecting continuity, reputation and regulatory standing

Together, they reflect how enterprises fund, select and scale supply chain services in 2026, moving from structural modernization to continuous orchestration and proactive security in an increasingly complex environment.



Scope of the report

This ISG Provider Lens® quadrant report covers the following three quadrants for services/solutions: Supply Chain Operations Modernization Services, Intelligent Supply Chain Orchestration and Control Tower Services, and Supply Chain Risk, Resilience and Compliance Services.

This ISG Provider Lens® study offers IT decision-makers:

- Transparency regarding the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the Global market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens® quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens® quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Who Should Read This Section

This report is valuable for service providers offering supply chain operations modernization services globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights the current market positioning of these providers based on the depth of their service offerings and market presence. The report also focuses on providers that help enterprises redesign supply chain operating models, modernize processes and data architectures, and establish scalable foundations for AI-enabled, resilient and sustainable supply chain operation.

Chief Supply Chain Officers

Should read this report to understand how providers support large-scale modernization initiatives across planning, sourcing, manufacturing, logistics and returns. The report highlights providers capable of redesigning operating models, improving decision frameworks and creating more agile, resilient and future-ready supply chains aligned with long-term business objectives.

Chief Technology Officers

Should read this report to evaluate providers' capabilities in transforming legacy supply chain environments through modern data architectures, AI, automation, digital twins and ecosystem integration. The report offers insights into how providers enable scalable technology foundations that support innovation, visibility and operational efficiency.

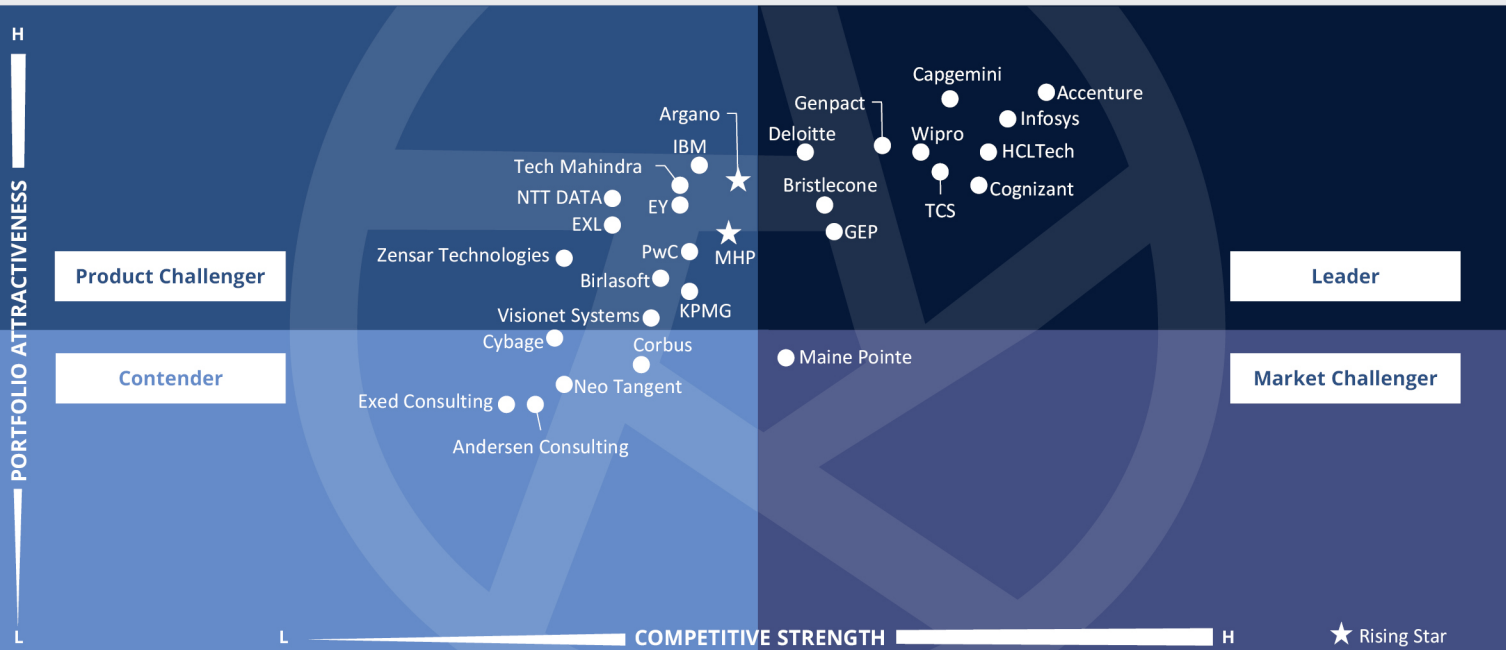
Digital Transformation Leaders

Should read this report to assess how providers deliver end-to-end supply chain transformation programs supported by consulting expertise, change management and value realization frameworks. The report highlights providers that align digital investments with enterprise goals while accelerating modernization outcomes across supply chain functions.

Transformation and Change Management Leaders

Should read this report to understand how providers drive organizational readiness, governance alignment, workforce adoption and sustainable change during multi-year supply chain transformation journeys. The report highlights providers that can successfully navigate complexity while delivering measurable business outcomes and operational improvements.





This quadrant assesses providers that help enterprises redesign supply chains through **operating model transformation, process modernization** and **AI-ready foundations** to improve efficiency, scalability, governance and long-term business performance.

Tarun Vaid

Supply Chain Operations Modernization Services

Definition

This quadrant evaluates providers that deliver structural modernization of supply chain operating models, helping enterprises redesign the way supply chains are planned, governed and enabled across planning, sourcing, manufacturing, logistics and aftersales.

They focus on foundational change, including process re architecture, data and decision frameworks, governance, and capability build out in alignment with long term business strategies.

Providers must demonstrate capabilities in supporting clients across both asset heavy and regulation heavy environments, where supply chains are shaped by physical production networks, capital intensiveness, lifecycle dependencies, or formal governance and compliance constraints. The focus is on designing and enabling a future-state supply chain, not on coordinating daily execution or responding to real time operational exceptions.

This quadrant represents the architectural layer of supply chain services, establishing the structures on which orchestration, execution and risk capabilities operate.

Eligibility Criteria

1. Capable of **end to end modernization** across multiple supply chain areas (plan, source, make, deliver and return)
2. Use reference **operating models**, maturity frameworks and transformation roadmaps
3. Have proven ability to modernize **processes, data architectures and decision logic** – not just tools
4. Show strong **consulting and advisory depth**, including value realization, governance and change management
5. Integrate **AI, automation, analytics, simulation or digital twins** into redesigned operations
6. Have **referenceable use cases** in the last 24 months
7. Have experience in aligning modernization with **resilient, sustainable and circular supply chain objectives**
8. Show a clearly defined **technology and ecosystem integration strategy** across ERP, execution and visibility platforms
9. Capable of modernizing supply chains in **both asset intensive and governance constrained environments**
10. Offer an established set of **tools, IPs and accelerators**
11. Demonstrate evidence of **complex, multi year transformation engagements**



Supply Chain Operations Modernization Services

Observations

Supply chain operations modernization primarily focuses on improving the underlying operating environment of the supply chain. The objective is to create more efficient, standardized and scalable processes by modernizing systems, workflows and operating models. Most engagements are centered around ERP transformation, planning platform implementations, warehouse modernization, procurement transformation, manufacturing digitization and cloud migrations.

At its core, operations modernization seeks to eliminate historical process inefficiencies. Organizations often struggle with fragmented systems, inconsistent processes, poor data quality, manual interventions and limited automation. Providers, therefore, focus on redesigning processes, implementing modern platforms, standardizing operating models and establishing governance structures that improve execution efficiency and operational performance.

The success of these programs is typically measured through improvements in productivity, throughput, inventory levels, cycle times, service levels, process compliance and cost efficiency. In essence, operations modernization helps organizations run supply chains more effectively.

The common provider approach is:

Standardize → Simplify → Digitize → Automate → Optimize

Providers increasingly begin by addressing operating models before implementing technology. They focus on creating repeatable global processes, governance structures, planning organizations and standardized KPIs. Technology modernization is then used to institutionalize the new operating model. The providers that perform best generally lead with business transformation rather than technology transformation.

From the 36 companies assessed for this study, 29 qualified for this quadrant, with 11 being Leaders and two Rising Stars.



Accenture combines supply chain strategy, operating model transformation and technology modernization to help enterprises build AI-enabled, resilient and scalable supply chains across global operations.

Bristlecone

Bristlecone delivers planning-led modernization through robust SAP-centric transformation capabilities, helping enterprises improve supply chain agility, process standardization and operational efficiency.



Capgemini combines consulting, digital engineering and supply chain transformation expertise to modernize end-to-end operations, enabling connected, data-driven and sustainable supply chains.



Cognizant leverages consulting-led transformation, platform modernization and AI-enabled operations to help enterprises simplify complex supply chain environments and accelerate business value realization.

Deloitte.

Deloitte combines deep advisory expertise with large-scale transformation capabilities to redesign operating models, modernize supply chain processes and strengthen enterprise resilience.



Genpact combines process transformation, AI-enabled operations and domain expertise to modernize supply chains, improve decision quality and deliver measurable operational and financial impact.



Supply Chain Operations Modernization Services



GEP integrates consulting, technology and operational expertise to modernize supply chain functions, helping clients drive process efficiency, visibility and scalable transformation outcomes.

HCLTech

HCLTech helps enterprises modernize supply chain operations through digital transformation, platform modernization and engineering-led innovation, enabling scalable and future-ready operations.



Infosys delivers business-led modernization through strong consulting, planning and digital transformation capabilities, helping enterprises build connected and intelligent supply chain ecosystems.



TCS combines deep domain expertise, large-scale transformation experience and ecosystem partnerships to modernize supply chain operations and enable long-term business agility.



Wipro leverages consulting, cloud, analytics and platform modernization capabilities to help enterprises transform supply chain operations and build more resilient operating models.



Argano (Rising Star) has strengthened its transformation-led modernization vision by combining supply chain expertise, broad platform capabilities and AI-ready foundations, positioning itself for continued market momentum.



MHP (Rising Star) demonstrates strong capabilities in supply chain and manufacturing transformation, helping enterprises modernize processes, improve operational performance and accelerate adoption of digital supply chains.



Accenture



“Accenture combines digital transformation expertise, governance discipline and operational execution capabilities to help enterprises modernize supply chain operations and establish resilient, data-driven processes.”

Tarun Vaid

Overview

Accenture is headquartered in Dublin, Ireland. It has more than 784,000 employees across 52 countries. In FY25, the company generated \$69.7 billion in revenue. The company supports enterprises in modernizing supply chain operations through digital core transformation, process redesign, AI-enabled advancements and managed services. Its approach combines industry expertise, data-driven governance and technology-led execution to enhance visibility, agility, operational resilience and decision-making across supply chain functions. The company brings together leading experts in the supply chain domain and technology specialists to support and deliver complex modernization requirements.

Strengths

Integrated digital core and data-led modernization:

Accenture’s integrated service structure combines process transformation, use of digital platforms and integration of data governance to modernize supply chain operations. It creates a unified data foundation to improve traceability, cross-functional collaboration and decision-making across planning, procurement, engineering and operational functions. Accenture has successfully executed large-scale transformation programs that consolidate fragmented data and processes into integrated management models.

Complex program execution capabilities:

Accenture combines advanced work packaging (AWP), digital engineering and governance-led delivery frameworks

to improve planning accuracy, manage cross-functional dependencies and increase predictability across large-scale transformation initiatives. This approach strengthens stakeholder alignment, execution discipline and risk mitigation across complex programs.

Established AI-enabled solutions:

Accenture embeds AI and automation into modernization initiatives to improve productivity, UX and process efficiency. Its work spans procurement transformation, intelligent decision support and digitally enabled operational management, combining change management and managed services capabilities to drive adoption and sustainable outcomes at scale across industries.

Caution

Accenture can further strengthen its positioning by articulating more measurable outcomes from its AI-led supply chain modernization initiatives and expanding visibility into repeatable industry-specific accelerators that highlight differentiated value creation across global client engagements.





Intelligent Supply Chain Orchestration and Control Tower Services

Intelligent Supply Chain Orchestration and Control Tower Services

Who Should Read This Section

This report is valuable for service providers offering intelligent supply chain orchestration and control tower services globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers that enable real-time visibility, decision intelligence and coordinated execution across supply chain ecosystems through control towers, AI-driven analytics, automation and integrated orchestration platforms.

Supply Chain Planning and Logistics Leaders

Should read this report to evaluate providers' ability to identify disruptions, prioritize exceptions and coordinate responses across complex supply networks. The report highlights capabilities in predictive analytics, control tower solutions, and enterprise-scale orchestration that improve operational performance and execution quality.

Chief Supply Chain Officers

Should read this report to understand how providers coordinate decision-making across planning, inventory, suppliers, logistics and fulfillment processes. The report highlights providers that improve responsiveness, customer service levels and supply chain agility through intelligent coordination and real-time operational visibility.

Technology and Business Unit Leaders

Should read this report to understand how providers integrate AI, decision intelligence, automation, ERP platforms and supply chain ecosystems to create connected orchestration environments. The report provides insights into providers' innovation roadmaps, technology partnerships and capabilities for scaling real-time decision-making across the enterprise.

Operations Transformation Leaders

Should read this report to assess how providers operationalize intelligent orchestration and drive adoption of control tower-led operating models. The report highlights providers that deliver measurable improvements in responsiveness, operational efficiency and decision-making consistency across supply chain functions.





Intelligent Supply Chain Orchestration and Control Tower Services

Definition

This quadrant assesses providers that deliver real time, cross functional coordination of supply chain operations through control towers, decision intelligence platforms and integrated visibility layers. They enable enterprises to identify, prioritize and orchestrate actions across demand, supply, inventory, logistics and partner ecosystems within existing supply chains.

Providers must demonstrate capabilities in supporting orchestration across both asset heavy and regulation heavy industries, including coordination across complex physical networks and environments with definitive controls, auditability and compliance guardrails. The focus is on continuous operational decision making and execution, leveraging AI, analytics and automation to improve responsiveness and service outcomes.

This quadrant evaluates providers' ability to operationalize orchestration layers that continuously coordinate live supply chain activities.

Eligibility Criteria

1. Deliver **multi function or end to end control tower solutions**
2. Can orchestrate decisions across **planning, logistics, inventory, suppliers and fulfillment**
3. Use AI, **predictive analytics and decision intelligence techniques** – not just dashboards
4. Enable integration across **multiple platforms, partners and data sources**
5. Offer real time **exception detection, prioritization and resolution frameworks**
6. Have proven capabilities in **deploying and orchestrating at enterprise scale**
7. Have strong partnerships with **planning, visibility, execution, and ERP platform ecosystems**
8. Can show client evidence on **measurable improvements in responsiveness, service levels or agility**
9. Experience in orchestration across supply chains with **complex physical networks and/or defined compliance and control requirements**
10. Have a practical innovation roadmap across technologies to continuously offer innovative solutions
11. Offer a strong and established set of **tools, IPs and accelerators**
12. Show **referenceable use cases** in the last 24 months



Intelligent Supply Chain Orchestration and Control Tower Services

Observations

Intelligent supply chain orchestration and control tower engagements focus on improving the quality, speed and effectiveness of supply chain decision-making, rather than the underlying process.

These programs are built around visibility, predictive analytics, scenario planning, exception management and AI-driven decision support. They aim to assist decision-makers in responding faster and more effectively to changing business conditions, rather than solely seeking ways to improve the process.

Modern supply chains operate in highly volatile environments where demand fluctuations, supplier disruptions, geopolitical events, transportation issues and inventory imbalances occur regularly. As a result, organizations need capabilities that help identify disruptions, evaluate alternatives, understand business trade-offs and orchestrate coordinated responses across multiple functions.

The success of orchestration programs is therefore measured through decision velocity, forecast accuracy, resilience, revenue protection, inventory optimization and responsiveness to disruptions. These initiatives help organizations make better supply chain decisions.

The common provider approach is:

Visibility → Predictability → Recommendation → Orchestration

Providers first establish visibility, then introduce predictive capabilities, followed by scenario analysis and recommendations. The most mature providers are beginning to introduce orchestration capabilities that support semi-automated execution of selected decisions, shifting the focus from visibility to a coordinated response.

From the 36 companies assessed for this study, 27 qualified for this quadrant, with 10 being Leaders and two Rising Stars.

accenture

Accenture helps enterprises move beyond visibility by combining control towers, AI, analytics and ecosystem orchestration to improve decision velocity, responsiveness and end-to-end supply chain coordination.

Capgemini

Capgemini delivers integrated control tower and orchestration capabilities that connect planning, logistics, inventory and execution functions, enabling real-time visibility and coordinated decision-making.

cognizant

Cognizant combines control towers, AI-enabled decision intelligence and multi-agent orchestration to help enterprises improve responsiveness, exception management and operational agility.

Deloitte.

Deloitte leverages strategy, analytics and digital supply chain expertise to build orchestration capabilities that improve cross-functional decision-making, operational visibility and business resilience.

genpact

Genpact leverages process expertise, AI and advanced analytics to enable decision-centric supply chain orchestration, helping organizations improve agility, service levels and operational performance.

HCLTech

HCLTech delivers intelligent control tower and orchestration solutions that integrate data, analytics and automation to improve real-time decision-making across complex supply chain environments.



Intelligent Supply Chain Orchestration and Control Tower Services



Infosys combines AI, digital platforms and supply chain expertise to help enterprises orchestrate planning and execution decisions, improving responsiveness, resilience and business outcomes.



LTM is an AI-led supply chain orchestration leader, combining scalable integration frameworks, agentic decision intelligence and deep ecosystem expertise to deliver real-time execution, measurable business outcomes and resilient, cross-functional supply chain performance.



TCS enables end-to-end supply chain orchestration through integrated planning, control tower solutions and AI-led insights that improve responsiveness, coordination and operational efficiency.



Wipro helps enterprises build intelligent orchestration capabilities by combining visibility, analytics, AI and automation to improve decision quality and supply chain adaptability.



Argano (Rising Star) demonstrates strong momentum in orchestration through its visibility-to-decision framework, which combines planning expertise, control towers, AI and scenario-based decision support to improve supply chain responsiveness.



Bristlecone (Rising Star) is strengthening its orchestration capabilities through planning-led control tower solutions, helping enterprises enhance visibility, exception management and coordinated decision-making across supply chain functions.





"Accenture leads in translating control tower concepts into enterprise-scale orchestration capabilities, combining AI, operating model redesign and execution excellence across some of the most complex supply chain environments."

Tarun Vaid

Accenture

Overview

Accenture is headquartered in Dublin, Ireland. It has more than 784,000 employees across 52 countries. In FY25, the company generated \$69.7 billion in revenue. The company delivers intelligent supply chain orchestration and control tower services through a combination of consulting, managed services, digital operations and AI-enabled platforms. Its approach delivers end-to-end visibility, decision intelligence and execution orchestration across planning, logistics, fulfillment and operations. Accenture continues to expand its AI-led supply chain capabilities through SynOps, agentic AI and large-scale transformation programs globally.

Strengths

AI-powered orchestration capabilities:

Accenture combines control towers, SynOps, analytics, automation and emerging agentic AI capabilities to orchestrate decisions across planning, inventory, logistics and fulfillment. Its approach emphasizes exception management, decision intelligence and coordinated execution rather than standalone visibility solutions.

Connected tower and end-to-end transformation framework:

Accenture has evolved from providing control tower visibility to enabling connected and orchestrated supply chain operations. The company's approach integrates data, processes, governance and operating model redesign, supported by industry-specific frameworks,

digital twins, scenario planning and control tower operating models. Its ability to connect supply chain functions, ecosystem partners and operational data supports faster responses to disruptions and changing demand conditions.

Scalable orchestration outcomes:

Accenture demonstrates extensive experience delivering large-scale orchestration programs across manufacturing, energy and utilities, consumer goods and logistics environments. Its reference engagements highlight integrated logistics towers, AI-enabled planning, digital nerve centers and operational governance frameworks that deliver measurable improvements in responsiveness, productivity and decision quality.

Caution

Enterprises should evaluate how Accenture's broad portfolio of orchestration, control tower, engineering and transformation capabilities aligns with their desired operating model and adoption timeline, particularly when scaling AI-driven orchestration across diverse business functions and geographies.





Supply Chain Risk, Resilience and Compliance Services

Who Should Read This Section

This report is valuable for service providers offering supply chain risk, resilience and compliance services globally to understand their market position and for enterprises looking to evaluate these providers. In this quadrant, ISG highlights providers that help organizations identify, assess and mitigate risks while ensuring compliance across complex global supply networks through advanced analytics, risk intelligence, resilience frameworks and governance services.

Chief Risk Officers

Should read this report to understand how providers help enterprises assess and mitigate geopolitical, supplier, climate, operational and regulatory risks. The report highlights providers capable of building resilience strategies, conducting scenario analysis and supporting long-term business continuity objectives across global supply chains.

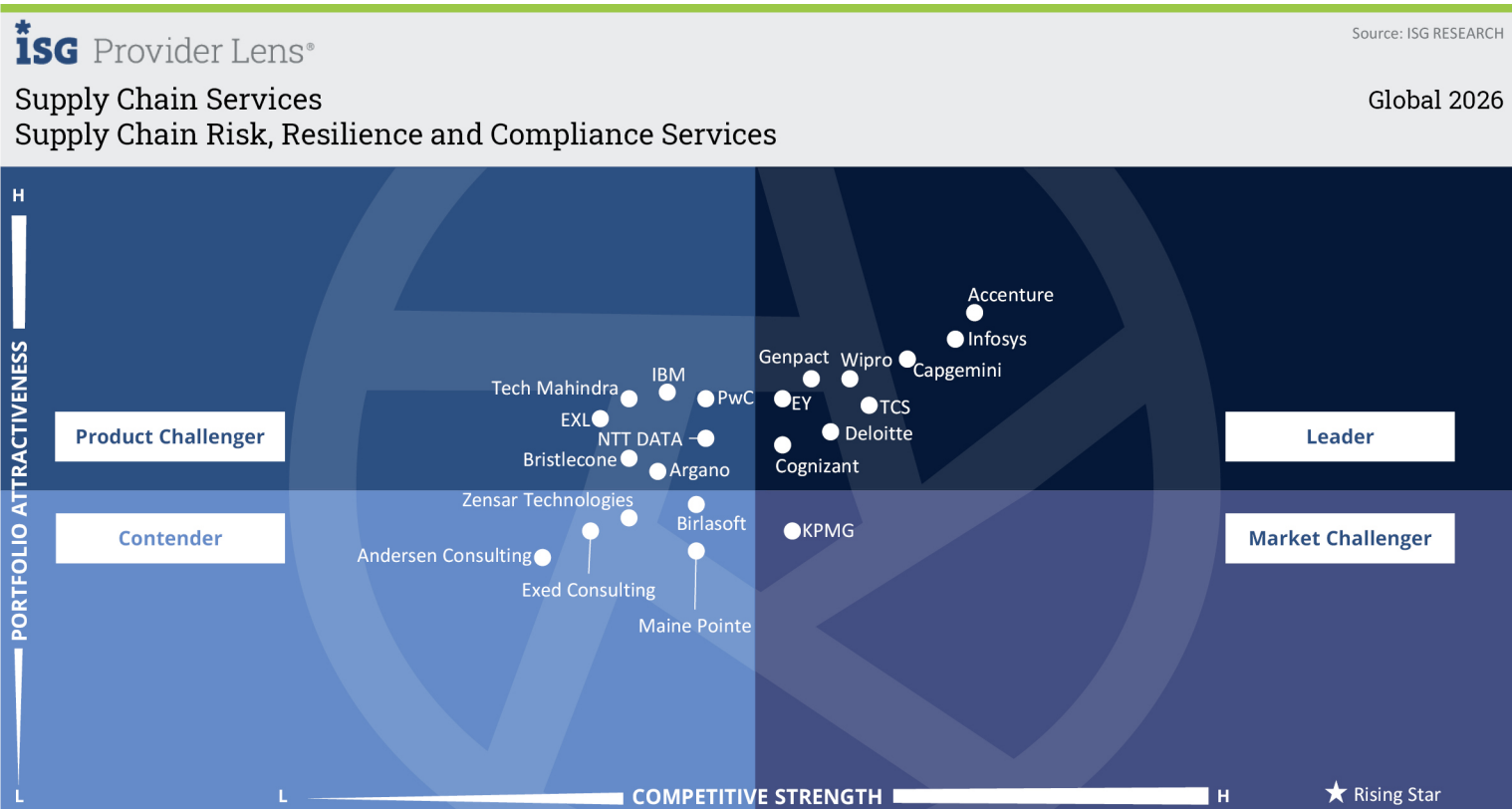
ESG, Sustainability and Compliance Leaders

Should read this report to understand how providers support compliance with evolving trade, ESG, sustainability and industry-specific regulations. The report highlights approaches for improving transparency, audit readiness, governance effectiveness and regulatory assurance across multi-tier supply chain ecosystems.

Digital Risk and Transformation Leaders

Should read this report to assess how providers leverage AI, analytics, external intelligence sources and digital platforms to strengthen resilience and improve risk visibility. The report highlights providers that integrate proactive monitoring and compliance assurance into enterprise-wide supply chain transformation strategies.





This quadrant assesses providers that help enterprises build **risk-aware, resilient and compliant supply chains** through risk intelligence, resilience planning, governance and continuous monitoring across extended supply networks.

Tarun Vaid



Supply Chain Risk, Resilience and Compliance Services

Definition

This quadrant evaluates providers that help enterprises identify, assess and manage supply chain risks, while ensuring compliance with regulatory, trade, ESG, sustainability and geopolitical requirements. Providers deliver services focused on risk intelligence, scenario modeling, resilience design and compliance assurance across extended, multi tier supply networks.

Providers must demonstrate capabilities in supporting clients across both asset heavy and regulation heavy industry environments, including managing risks arising from physical asset dependency, supplier concentration, geopolitical exposure and statutory governance obligations. They factor in risk and compliance into supply chain planning, policy and decision frameworks rather than focus on coordinating day to day execution or redesigning core operating models.

This quadrant represents the protective and assurance layer of the supply chain services ecosystem, focused on continuity, reliability and long term resilience.

Eligibility Criteria

1. Ability to identify and assess **geopolitical, supplier, climate, regulatory and operational risks**
2. Deliver **scenario planning, stress testing and resilience roadmaps**
3. Have expertise in **trade laws, ESG and sustainability regulations, and industry specific mandates**
4. Use analytics, **AI and external data sources** for monitoring and identifying risks
5. Can integrate **risk intelligence into planning and operational decision-making**
6. Ability to support **global, multi tier supplier and partner ecosystems**
7. Offer advisory and managed services for **governance, controls, audit readiness and compliance assurance**
8. Have a strong and established set of **tools, IPs and accelerators**
9. **Referenceable use cases of work** in the last 24 months



Supply Chain Risk, Resilience and Compliance Services

Observations

Supply chain risk, resilience and compliance services focus on helping enterprises build resilient, compliant and risk-aware supply chains. The objective is to embed governance, risk management and compliance controls into supply chain operations to improve resilience, reduce disruptions and meet evolving regulatory and ESG requirements.

This quadrant assesses providers that help identify and mitigate risks stemming from supplier failures, geopolitical uncertainty, trade restrictions, cyber threats, sustainability mandates and regulatory changes. Providers focus on strengthening governance frameworks, improving supplier visibility and establishing risk and compliance processes that support business continuity.

Modern GRC programs extend beyond traditional audits and compliance checks. Providers increasingly integrate continuous risk monitoring, multi-tier supplier visibility, disruption sensing, supplier risk intelligence and scenario planning into operational management.

The goal is to identify risks, improve preparedness and enable faster response when disruptions occur.

Success is typically measured through improvements in risk visibility, supplier resilience, compliance, ESG performance and business continuity. In essence, GRC services help organizations better protect their supply chains.

The common provider approach is:

Identify → Assess → Govern → Mitigate → Sustain

Providers typically begin by establishing governance structures, risk frameworks, supplier risk models and compliance policies. Technology is then used to enable continuous monitoring, predictive risk management and resilience planning. Leading providers increasingly position governance and risk as strategic business capabilities rather than as standalone compliance functions.

From the 36 companies assessed for this study, 22 qualified for this quadrant, with nine being Leaders.

accenture

Accenture helps enterprises strengthen resilience through integrated risk management, compliance governance, sustainability programs and scenario-based planning across complex global supply networks.



Capgemini combines risk intelligence, regulatory compliance, sustainability expertise and resilience planning to help organizations improve supply chain continuity and governance.



Cognizant integrates supplier risk management, ESG monitoring, compliance controls and resilience capabilities to help organizations proactively manage supply chain disruptions and regulatory obligations.

Deloitte.

Deloitte leverages deep advisory and industry expertise to help enterprises embed governance, risk management, compliance and resilience into their supply chain strategies and operating models.



EY combines risk, sustainability, regulatory and transformation capabilities to help organizations strengthen governance frameworks, improve resilience and manage evolving compliance requirements.



Genpact leverages analytics, process expertise and AI-enabled risk monitoring to help enterprises improve supply chain resilience, governance effectiveness and regulatory compliance.



Supply Chain Risk, Resilience and Compliance Services



Infosys helps organizations integrate risk intelligence, sustainability, compliance and resilience into supply chain operations, improving preparedness and business continuity.



TCS combines risk management, governance, sustainability and digital capabilities to help enterprises improve supply chain resilience, transparency and regulatory readiness.



Wipro enables organizations to strengthen supply chain governance, mitigate operational and regulatory risks and improve resilience through data-driven monitoring and compliance frameworks.





“Accenture is a leader for its ability to embed risk, resilience and compliance into governance, planning and execution, supported by digital engineering, resilience stress testing and strong traceability capabilities across complex supply ecosystems.”

Tarun Vaid

Accenture

Overview

Accenture is headquartered in Dublin, Ireland. It has more than 784,000 employees across 52 countries. In FY25, the company generated \$69.7 billion in revenue. Accenture's supply chain risk, resilience and compliance services combine risk intelligence, integrated governance, digital engineering, scenario-based planning and compliance-led transformation. The company's capabilities span operational readiness, project and portfolio governance, supplier and ESG risk management, resilience modeling and data-driven decision-making across complex, asset-intensive supply chain ecosystems.

Strengths

Integrated risk governance and predictability: Accenture combines governance, planning, cost, procurement, engineering and execution controls into a unified management framework. Its expansive base of capital-project and operational-readiness engagements demonstrates a strong ability to improve predictability, mitigate execution risks, strengthen auditability and support decision-making across complex supply chain networks.

Advanced resilience engineering: Accenture differentiates itself through resilience-focused methodologies, including stress testing, advanced work packaging (AWP), building information modeling (BIM), scenario modeling and construction-driven planning.

These capabilities help clients identify vulnerabilities, assess financial risks, simulate the impact of disruptions and establish mitigation strategies before risks affect supply chain operations.

Compliance, ESG and traceability focus: Accenture demonstrates strong capabilities in regulatory compliance, ESG governance, responsible sourcing and information traceability. Its services enable clients to improve environmental compliance, supplier transparency, quality in governance, audit readiness and data integrity, while ensuring resilience against evolving regulatory and sustainability mandates.

Caution

Accenture's sophisticated governance, digital engineering and transformation-led approach may require significant client commitment and cross-functional alignment. Enterprises should define decision rights, accountability and change management early on in an engagement to maximize value realization.





Appendix

Methodology & Team

The ISG Provider Lens® 2026 – Supply Chain Services study analyzes the relevant software vendors/service providers in the Global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens® program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. The data collected for this report represent information that ISG believes to be current as of August 2026 for providers that actively participated and for providers that did not. ISG recognizes that many mergers and acquisitions may have occurred since then, but this report does not reflect these changes.

All revenue references are in U.S. dollars (\$US) unless noted otherwise.

The study was conducted in the following steps:

1. Definition of Supply Chain Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG's internal databases and advisor knowledge & experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts & figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - * Strategy and vision
 - * Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * Technology advancements



Author and Editor Biographies



Lead Analyst and Author

Tarun Vaid
Manager and Principal Analyst

Tarun Vaid brings over 12 years of experience in technology research and advisory. At ISG, Tarun is a Senior Lead Analyst for Digital Business Enablement and ESG, SAP Ecosystem, Supply Chain, and Procurement Services studies for U.S. geography. Tarun brings nearly a decade of experience in technology research and consulting. Tarun is majorly focused on the latest technology trends and is responsible for providing actionable insights through research and analysis about the market and provider's profile.

Tarun also keeps a keen interest in the software market, the impact of AI, automation and analytics, and brings in a strong background in this segment.



Study Sponsor

Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens® program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens® program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.





IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens®

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens®, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



Provider Lens®

The ISG Provider Lens® Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners. ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens® research, please visit this [webpage](#).

Research™

ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

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ISG (Information Services Group) (Nasdaq: III) is a leading global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth.

The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.

For more information, visit isg-one.com.





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