

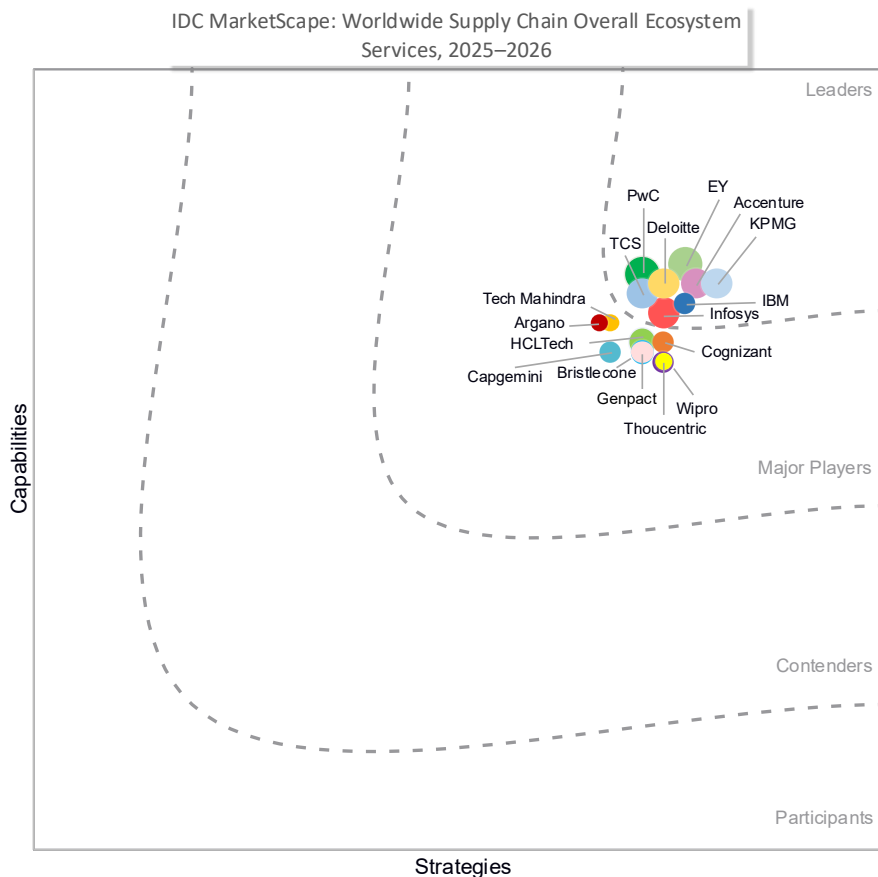
IDC MarketScape: Worldwide Supply Chain Overall Ecosystem Services 2025–2026 Vendor Assessment

Eric Thompson

THIS EXCERPT FEATURES EY AS A LEADER
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Supply Chain Overall Ecosystem Services 2025–2026 Vendor Assessment



Source: IDC, 2025

Please see the Appendix for the detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Supply Chain Overall Ecosystem Services 2025–2026 Vendor Assessment (Doc # US53932825).

IDC OPINION

While supply chains in manufacturing and across all industries have long been advancing their digital transformation journeys, the past five years have dramatically accelerated investment in supply chain capabilities.

In the face of supply disruption, demand volatility, and macroeconomic pressures, supply chains have become highly focused on resiliency. The integration of all operations, risk assessments, responsiveness, visibility, and agility has been a hallmark of recent supply chain investments.

Advancements in AI have further heightened focus on the space, and enterprises are looking for partners to help them achieve digital maturity gains to balance efficiency and resiliency.

With that as the backdrop, there is high value in selecting outstanding partners to aid in digital transformation and to support technological and organizational shifts aimed at increasing supply chain resiliency and efficiency.

Across manufacturing and retail supply chains, there is a significant number of vendors providing supply chain management (SCM) applications to address these needs. Many strategic integration firms have developed targeted practices for these product companies. Businesses have realized that their supply chain capabilities were neither robust nor resilient, and IDC is seeing a renewed focus from many of them. This means an increase in the assessment and implementation of supply chain management tools and the heightened adoption of new technologies, such as cloud and AI, in support of a digital journey. Strategic integration firms that have notable supply chain practices are a key component of success for this journey, whether providing advisory services, business process outsourcing, application development and integration, or ongoing support and continuous improvement.

This 2025–2026 IDC MarketScape for worldwide supply chain overall ecosystem services looks at IT services firms that support the assessment, selection, and

implementation of all suites of supply chain management tools. Many of these firms support a broader range of IT tools, but for the purpose of this document, we are only assessing the supply chain. This research is both a quantitative and qualitative assessment of the characteristics and capabilities that affect a vendor's success in delivering supply chain transformation for manufacturers and retailers. Throughout the assessment, four common opportunities/challenges emerge that IT services firms must address:

- Although the cloud has not yet significantly surpassed on-premises solutions by the measure of the overall installed market, the growth rates of cloud adoption in recent years, and moving forward, will be much higher, and the future of supply chain applications seems quite clear. The ability of supply chain services firms to support cloud products is critical.
- Building a road map for supply chain transformation is complex and often challenging, thus leading to a series of pilots or extended implementation cycles. IT firms that perform particularly effectively here do so by integrating assessment tools with implementation/integration.
- Many manufacturers and retailers still run supply chain management tools from multiple vendors and may find cloud offerings that lack specific industry functionality. The ability of IT services firms to help integrate disparate tools and offer task apps that bridge functionality gaps was an important part of this assessment.
- IDC also focused on emerging technologies, such as GenAI, agentic AI, decision support/intelligence, end-to-end orchestration, and other capabilities.

Although IDC would not hesitate to recommend any of the vendors included in this assessment, to mitigate the aforementioned challenges, manufacturers and retailers should look for the following from their chosen SCM IT consulting firms:

- A proven track record of business model transformation in the supply chain
- A culture of innovation and expertise with relevant innovative technologies
- The ability to create a road map for supply chain transformation on a global scale
- Experience/expertise in specific subsegments of manufacturing or retail, high tech, or consumer products
- Experience with similarly sized manufacturers or retailers
- Clarity of vision/strategy to guide the manufacturer or retailer, and not be led

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This study assesses the capability and business strategy of many notable IT consulting vendors in the supply chain overall ecosystem services market. While all vendors included in this IDC MarketScape deliver a broad range of capabilities and offerings within the end-to-end supply chain market, they offer a variety of approaches and hold expertise in a breadth of subvertical industries and company sizes within manufacturing and retail. The "short list" that this IDC MarketScape provides highlights the current capabilities and the future strategies of each IT consulting vendor to enable technology buyers to more efficiently identify the appropriate fit to support their respective supply chain transformation goals and needs.

There is a wide number of IT consulting firms offering supply chain management services to the manufacturing and retail industries. IDC chose the vendor inclusion criteria for this study to accurately portray the vendors that are representative of a supply chain services buyer's selection list. This document cannot replace the due diligence that should be done as part of the selection of a services firm, but it is useful as one data point in a manufacturer's decision-making process to sharpen the vendor evaluation process. This IDC MarketScape focuses on IT consulting vendors that meet the criteria and focus on a broad set of offerings and capabilities to support the overall SCM ecosystem. For this study, we have focused on those IT consulting firms with the following characteristics:

- Vendors must have a global presence — engagements in at least two major geographic regions.
- Vendors must have industry breadth with engagements in manufacturing and at least one additional industry (retail, life sciences, wholesale, etc.).
- Vendors must have been offering supply chain-related integration and implementation services for at least five years.
- Vendors must have at least 20 client engagements in the overall supply chain ecosystem.

ADVICE FOR TECHNOLOGY BUYERS

Although supply chain transformation has been an important priority for many companies, the past five years have thrown the globe into a period of uncertainty and disruption and brought supply chains into the spotlight because their weaknesses in responding to the challenges that the COVID-19 pandemic, wars, trade protectionism, and macroeconomic pressures created were exposed. Indeed, this tumultuous period has cast a light on what supply chain executives have known for some time now: Connectivity and automation are crucial to operating today's complex global

businesses, and digital transformation across supply chains and software to manage specific processes — combined with technologies that can sense, gather, secure, cleanse, compile, and analyze necessary data — must be a part of a modern, resilient supply chain.

IDC expects that for the foreseeable future, companies that invest in resiliency and digital competencies in their supply chains will outperform those that do not. While the direct impact of the pandemic is starting to move into the rearview, the broader ramifications will reverberate for years. We have been seeing, and continue to foresee, a general modernization and refurbishment of traditional supply chain approaches.

For manufacturers and retailers either embarking on or continuing their supply chain transformation journey, IDC offers the following guidance:

- **Prepare your supply chain organization for a transformation journey and not one-off skunkworks or pilots.** In the strategic planning phase, it is critical to view all technology investments through the lens of a digital journey. If an investment or a project cannot link to a broader strategy, reassess it for its criticality to business transformation. Manufacturers and retailers must be able to leverage the success and value of each investment within a broader journey of supply chain transformation. Ensure that the IT services firm you select can be a partner on this journey.
- **Look for the *right* services partner.** The right services partner should understand your industry and any technical limitations you may possess and have a deep understanding of the overall ecosystem supply chain product suite that you select.
- **Select an IT service partner that brings strong technical skills and has task app capabilities.** There is no single supply chain product vendor that can meet the needs of all manufacturers and retailers.
- **Create shared goals and outcomes that can be measured and adjusted as the business changes.** Supply chain transformation is a journey, and working with IT consulting partners should be viewed through the lens of a longer-term partnership. But to ensure satisfaction and success, manufacturers and retailers need to work with partners to agree on goals and KPIs. Value-sharing engagement is becoming quite popular.
- **Select an IT vendor with flexible experience and a varied business model experience.** Supply chain transformation and shifting business models are part of the journey for manufacturers without a well-defined endpoint. Manufacturers need to be strategic in how the digital tools they invest in accelerate their transformation, as opposed to driving further gaps in knowledge

or ending up with disconnected silos. IT consulting vendors can aid manufacturers in this journey.

- **Seek partners who focus on delivering value and solving specific use cases.** Many can tell solid stories about their work on advanced capabilities. Double-clicking with potential partners on their approach to delivering measurable, meaningful value will help identify the right fit for your business.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

EY

EY is positioned in the Leaders category in this 2025–2026 IDC MarketScape for worldwide supply chain overall ecosystem services.

EY is a global IT consulting and services firm incorporated in London, United Kingdom. EY, founded in 1989, has been delivering supply chain management offerings and services for 18 years, with more than 1,000 employees globally supporting supply chain specifically and many thousands more across all other functions and technologies. The company has around 6,000 supply chain management clients around the globe, with a significant client base in Europe, North America, and APAC. EY serves a variety of manufacturing subverticals, with notable capabilities in consumer goods, high tech, and heavy machinery.

EY's range of services includes supply chain strategy, transformation, organization design, change management, and program management. It also provides supply chain technology vendor selection, implementation, and managed services. EY has established relationships with the majority of supply chain tech vendors, offering a wide variety of solutions and integration across platforms.

EY has proprietary technology to complement its ecosystem and provide context in blueprint workshops and to help with supply chain design. Its technology includes solutions across end-to-end operations, incorporating advanced technologies and capabilities.

Strengths

EY's strength is in an end-to-end supply chain transformation offering, along with product implementation and the ability to connect processes and stakeholders across

the client's end-to-end organization. EY is client centric and vendor and technology agnostic. Practitioners are trained and knowledgeable across many systems and bring skills across process mapping, software comparison, business design, and change management. EY offers a business transformation (including people change management) approach versus a pure technology approach.

EY is able to leverage the full capabilities of its business and technology consulting (SC&O, technology, cybersecurity, internal audit and risk, and tax) while leveraging its proprietary assets. The company is agnostic on technology and knowledgeable in selected technology platforms and applications. It focuses on solving business problems first, and it is a trusted technical advisor to clients by providing the right technology for their transformation. Its extensive ecosystem and alliances with trusted technology partners provide a distinct advantage for clients.

EY hires extensively from the industry, bringing deep practical experience and knowledge. In addition to its end-to-end expertise and industry knowledge, it has a large list of proprietary assets and tools. Its global reach and ability to seamlessly coordinate and execute across the world are significant.

Challenges

EY's main challenges are resources, costs, and client preferences for siloed technology updates rather than an end-to-end business transformation. It may lose deals where a broad transformation message takes a back seat to more narrow project parameters. In some cases, client readiness for advanced solutions can be an issue as well, though EY offers support for transformations.

Consider EY When

Manufacturers in a variety of industries should consider EY when looking for a partner that can drive SCM value and supply chain transformation on a global scale. Its global scope, work across multiple industries, and technological focus make it an attractive choice for many companies.

APPENDIX

Reading an IDC MarketScape Graph

For this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under

this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent 'well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores and, ultimately, vendor positions on the IDC MarketScape on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's 'characteristics, behavior, and capability.

Market Definition

Supply chain overall ecosystem services are a wide range of services that IT services firms deliver to help manufacturing and retail organizations make decisions, improve business processes, assess and implement supply chain tools, and reshape supply chain operations. Significant components include:

- **Systems implementation and/or integration:** This component helps companies run their supply chain organizations more effectively and efficiently and helps companies make better resource trade-offs and decisions, improve overall business process performance, and optimally implement supply chain applications and tools.
- **Strategic consulting:** While systems implementation/integration often aligns with technology initiatives, the strategy consulting efforts are not always specific to IT applications; they may align with reengineering supply chain planning processes, rethinking enterprisewide approaches to planning initiatives, or determining how the supply chain can support a fundamental rethinking of the overall business model.
- **Application development, maintenance, and support:** This component includes the ability to develop adjacent tools and task apps to bolster the capabilities of the SAP SCM suite. It also includes the ability to support implementations and help manage upgrades.

For the purpose of this document, the supply chain services overall ecosystem vendors include Anaplan, Blue Yonder, Coupa-LLamasoft, Dassault, e2open, Infor, Kinaxis, Korber, IBM Sterling, Logility, Manhattan, Microsoft, o9, OMP, Oracle, QAD, and SAP

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Supply Chain All Other Ecosystem Services 2025 Vendor Assessment* (IDC #US52996225, November 2025)
- *IDC MarketScape: Worldwide Supply Chain Oracle Ecosystem Services 2025 Vendor Assessment* (IDC #US52996425, November 2025)
- *IDC MarketScape: Worldwide Supply Chain SAP Ecosystem Services 2025 Vendor Assessment* (IDC #US52996525, November 2025)
- *IDC MarketScape: Worldwide Supply Chain Blue Yonder Ecosystem Services 2025 Vendor Assessment* (IDC #US52996325, November 2025)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of the IT consulting providers supporting supply chain management processes. This study specifically analyzed these offerings within the supply chain across all ecosystem services suites.

Note that IDC is producing five studies, of which this is one. The full list of studies covers all ecosystems, Blue Yonder, Oracle, SAP, and all other ecosystems. Buyers looking to go deeper in any other ecosystem are encouraged to also focus there. This overall study helps give an idea of the vendors that can support a broad range of ecosystems end to end.

"Supply chains and supply chain functions have grown in focus, strategic priority, and investment spending. At the same time, the complexity of operations and sophistication of technology are presenting the need to level up digital capabilities. This places a premium on selecting strategic services partners that can help improve processes, technologies, and capabilities in supply chain and promote selecting technology vendors ideal for their needs," says Eric Thompson, research director, Worldwide Supply Chain Planning and Services, IDC. "The intent of this IDC MarketScape is to highlight those IT consulting firms that focus on both a deep and broad set of offerings and capabilities to support supply chain management across all ecosystems."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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