

Supply Chain Services

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



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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

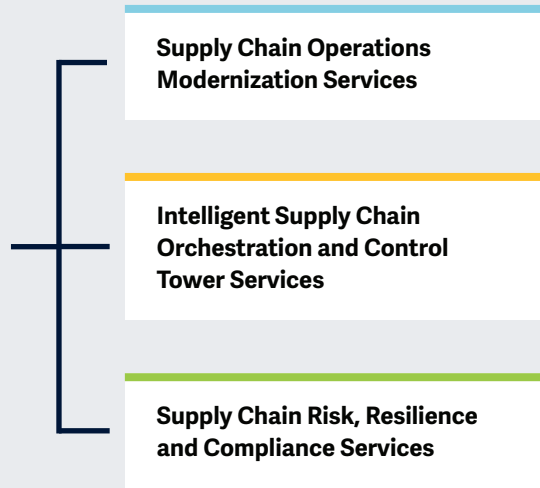
Risk, Resilience and Compliance

- 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.



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

Scope of the report

The ISG Provider Lens® Supply Chain Services 2026 study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on the Global and Brazil markets

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



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**



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. **Show referenceable use cases** in the last 24 months
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. Have strong partnerships with **planning, visibility, execution, and ERP platform ecosystems**



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



Quadrants by Region

As part of this ISG Provider Lens® quadrant study, we are introducing the following three quadrants on Supply Chain Services 2026:

Quadrant	Global	Brazil
Supply Chain Operations Modernization Services	✓	✓
Intelligent Supply Chain Orchestration and Control Tower Services	✓	✓
Supply Chain Risk, Resilience and Compliance Services	✓	✓



The research phase falls in the period between May and June 2026, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in September 2026.

Milestones	Beginning	End
Survey Launch	May 13, 2026	
Survey Phase	May 13, 2026	June 12, 2026
Sneak Preview	August 2026	September 2026
Press Release & Publication	September 2026	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider’s position in the IPL quadrant and the awards.

Please refer to the [ISG Provider Lens® 2026](#) research agenda to view and download the list of other studies conducted by ISG Provider Lens®.

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Buyers Guide

ISG Software Research, formerly “Ventana Research,” offers market insights by evaluating technology providers and products through its Buyers Guides. The findings are drawn from the research-based analysis of product and customer experience categories, ranking and rating software providers and products to help facilitate informed decision-making and selection processes for technology.

In the course of the Supply Chain Services 2026 IPL launch, we want to take advantage of the opportunity to draw your attention to related research and insights that ISG Research will publish in 2026. For more information, refer to the [Buyers Guide research schedule](#).

Research Production Disclaimer:

ISG collects data for the purposes of conducting research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens® reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.



ISG Star of Excellence® — Call for nominations

The Star of Excellence® is an independent recognition of excellent service delivery based on the Voice of the Customer concept. ISG has designed the Star of Excellence® program to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts are continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in its practitioner-led consulting approach.

Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

Our vision for the Star of Excellence® is to become acknowledged as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement, please use the "Nominate (for Providers)" section on the Star of Excellence® [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
star@cx.isg-one.com



ISG Star of Excellence



Methodology & Team

The ISG Provider Lens® 2026 – Supply Chain Services study analyzes the relevant software vendors/service providers in the Global and Brazil 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 May 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.



Contacts For This Study

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Namratha
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**Chief Business
Leader**



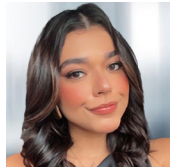
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Tishya
Selvaraj

Data Analyst



Abhilash
M V

Project Manager



ISG Provider Lens® Involvement Program

ISG Provider Lens® offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three consultant advisors participate as part of each study's quality and consistency review process. The consultant advisors ensure each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the consultant advisors' group and contribute at different levels depending on their availability and expertise.

The consultant advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service provider inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors for this study



Bill
Huber

**Partner,
Digital Platforms
and Solutions**



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

4flow*	BDO	Conduent	Flex
Accenture*	BearingPoint	Connexion	Genpact*
Advision Consulting	Birlasoft*	Corbus*	GEP*
Alvarez & Marsal*	Boston Consulting Group	Cybage*	Gi BPO*
Andersen Consulting*	Bristlecone*	Datamatics	Group50
Aquanima*	BRQ*	Deloitte*	HCLTech*
Argano*	BRSupply	Dragon Sourcing	Hitachi Digital Services*
Artefact	Camelot	dss*	IBM*
Arvato	Capgemini*	DXC Technology	ILOS*
Ascensus Group	CGI	Exed Consulting*	IMAM
Atos*	Chain IQ	EXL*	Infosys*
Avanade	Clarkston Consulting	EY*	Infotec Brasil*
Avnet*	Coforge	Falconi*	Integration Consulting
Bain&Company*	Cognizant*	Fcamara	Invensis*
BCG*	Concentrix	Fiorde Group*	Jade Global



Invited Companies

Kearney	Opentech	Visionet Systems*
KPMG*	Partners in Performance	Wipro*
Kyndryl*	Peers*	WNS*
Level Group*	Peloton*	XBP Global
Leverage+*	Procurement Garage	Xcelis*
Lincros*	Proudfoot	Zensar Technologies*
LTM*	PwC*	Zones*
MadeInWeb*	Qlog	
Maine Pointe	Roland Berger	
McKinsey	Sequor*	
Miebach	Stefanini*	
Moby*	Supply Solutions*	
Mphasis*	TCS*	
Neo Tangent*	Tech Mahindra*	
Nexdigm*	The Supply Chain Consulting Group	
N-iX	T-Systems*	
NTT DATA	Unisoma*	
Oliver Wight	Visagio	



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.

ISG offers research specifically about providers to state and local governments (including counties and cities) and higher education institutions. Visit: [Public Sector](#).

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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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.





MAY, 2026



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