Magic Quadrant pour les solutions de planification de la chaîne d'approvisionnement

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La technologie de planification de la chaîne d'approvisionnement est nécessaire pour faciliter une planification réactive et agile qui soutient les objectifs stratégiques d'une entreprise. Ce Magic Quadrant aidera les leaders de la technologie de la chaîne d'approvisionnement lors de l'évaluation et de la sélection du fournisseur de logiciels le plus approprié pour faire mûrir leur planification de la chaîne d'approvisionnement.

Définition/description du marché

Gartner définit une solution de planification de la chaîne d'approvisionnement (SCP) comme une plate-forme qui fournit un support technologique pour permettre à une entreprise de gérer, lier, aligner, collaborer et partager ses données de planification tout au long d'une chaîne d'approvisionnement étendue. Une solution SCP prend en charge la planification, allant de la planification de la demande à la planification détaillée de la réponse du côté de l'offre et de la planification stratégique à la planification au niveau de l'exécution. Il s'agit du référentiel de décisions de planification pour une chaîne d'approvisionnement définie de bout en bout. C'est aussi l'environnement dans lequel les décisions de bout en bout intégrées de la chaîne d'approvisionnement sont gérées. Il établit une version unique de la vérité pour les données de planification et les décisions, quel que soit l'environnement technologique d'exécution sous-jacent.

Les capacités fondamentales d'une solution SCP sont les suivantes :

- Planification de la demande (comme la prévision de la demande et la planification consensuelle de la demande)

- Planification de l'approvisionnement (comme la planification des stocks, la planification du réapprovisionnement, la promesse de commandes, la planification de la production et l'ordonnancement de la production)

- Prise en charge de l'alignement des décisions de planification à l'échelle de l'entreprise et sur plusieurs horizons temporels de planification

- Soutien à l'analyse et à la planification de l'impact financier

Les capacités opérationnelles d'une solution SCP sont les suivantes :

- Analytique avancée et IA

- Jumeau de la chaîne d'approvisionnement numérique

- Conception et modélisation de la chaîne d'approvisionnement

- Planification continue

- Segmentation de la chaîne d'approvisionnement

- Planification multientreprises

Les solutions SCP sont principalement déployées dans un cloud à l'aide de modèles SaaS (Software-as-a-Service), mais peuvent également être fournies via un modèle hébergé ou installées sur site.

Magic Quadrant

Magic Quadrant pour les solutions de planification de la chaîne d'approvisionnement

CHALLENGERS | LEADERS

- Kinaxis
- Oracle
- OMP
- SAP
- RELEX Solutions
- Blue Yonder
- John Galt Solutions
- Anaplan
- Logility
- o9 Solutions
- Coupa

NICHE PLAYERS | VISIONARIES

- Arkieva
- Slimstock
- Adexa
- e2open
- GAINSystems
- FuturMaster
- Dassault Systèmes
- ICRON
- QAD

ABILITY TO EXECUTE

COMPLETENESS OF VISION → As of February 2023 © Gartner, Inc

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Forces et mises en garde des fournisseurs

Adexa

Adexa est un acteur de niche dans ce Magic Quadrant. Sa solution SCP numérique est axée sur la fourniture de plans précis de bout en bout. Les activités d'Adexa se concentrent sur l'Amérique du Nord, l'Europe occidentale et l'Asie/Pacifique (y compris le Japon), où elle cible les moyennes et grandes entreprises dans divers secteurs, mais en mettant l'accent sur la fabrication discrète. La stratégie d'Adexa pour sa solution SCP consiste à utiliser des techniques d'apprentissage automatique (ML) pour l'autocorrection des modèles de chaîne d'approvisionnement, l'auto-amélioration des règles et politiques commerciales et l'auto-optimisation des algorithmes.

Forces

- **Automatisation** : Adexa a une vision forte de l'automatisation, qui s'étend à la planification autonome en utilisant les Genies Adexa (agents d'IA). La vision d'Adexa est de permettre l'automatisation prescriptive pour, entre autres, le suivi et l'interprétation des alertes, le comportement des fournisseurs et la sélection des politiques. Il conçoit des génies pour apprendre et améliorer les actions et les décisions, plutôt que de simplement les répéter.

- **Granularité et latence du plan** : La vision d'Adexa comprend la planification à des niveaux très détaillés en utilisant une planification détaillée et de solides capacités de planification basées sur les attributs. Pour ce faire, il a également une vision forte pour apporter des données très détaillées et en temps réel dans la solution à partir de sources telles que les systèmes d'exécution de la fabrication, les systèmes de gestion d'entrepôt et les systèmes de gestion du transport.

- **Capacités de planification de l'approvisionnement** : La solution d'Adexa affiche de solides capacités dans plusieurs domaines, mais surtout pour la planification de l'approvisionnement. L'utilisation active des attributs et le niveau de détail incorporé dans les plans améliorent également la capacité d'aligner les décisions de planification de bout en bout, en particulier pour la planification à court et à moyen terme.

Précautions

- **Configuration de la** chaîne d'approvisionnement : La vision d'Adexa en matière de capacités de prise en charge de la configuration de la chaîne d'approvisionnement – en ce qui concerne la segmentation de la chaîne d'approvisionnement et la conception du réseau, par exemple – est limitée. Cela peut affaiblir l'alignement des plans à court terme (exécution des ventes et des opérations [S&OE]) et à moyen terme (planification des ventes et des opérations [S&OP]) d'une entreprise avec ses plans stratégiques à long terme.

- **Expérience utilisateur** : Adexa a considérablement amélioré l'interface utilisateur tout au long de sa solution au cours des trois dernières années, modernisant l'apparence et améliorant la visualisation. Mais, comme pour tous les nouveaux développements, il faudra un certain temps pour que la nouvelle expérience utilisateur soit pleinement déployée et mûrie. En outre, bien que la vision globale d'Adexa pour l'expérience utilisateur soit supérieure à la moyenne, son accent sur l'explicabilité des résultats de planification à l'utilisateur final pourrait être plus fort.

- **Services** de mise en œuvre tiers : Adexa a moins de partenaires de mise en œuvre tiers que les autres fournisseurs de ce Magic Quadrant. Cela limite le choix de l'entreprise par les clients pour les soutenir dans leurs parcours de mise en œuvre.

Anaplan

Anaplan est un challenger dans ce Magic Quadrant. Sa plate-forme de planification connectée prend en charge les fonctions de planification de la demande et de l'offre, de S&OP et de planification des achats, et les aligne sur les objectifs de planification intégrée d'une entreprise dans le cadre d'une approche étendue de planification et d'analyse (xP&A). Ses opérations sont géographiquement diversifiées et elle soutient les entreprises de toutes les industries couvertes par ce Magic Quadrant. En décembre 2022, Anaplan a annoncé l'acquisition stratégique de la division applications de Vuealta, y compris sa suite d'applications de chaîne d'approvisionnement spécialement conçues. En 2023, Anaplan se concentrera sur quatre portefeuilles sectoriels – produits de consommation/vente au détail, fabrication, haute technologie/médias et communications, et services financiers et commerciaux – influençant sa stratégie de solutions alignées sur l'industrie et d'offres et de capacités partenaires.

Forces

- **Expérience utilisateur** : La plate-forme Anaplan Connected Planning offre une interface utilisateur harmonisée avec des écrans utilisateur configurables et des mises en page graphiques. Il dispose d'un outil de collaboration interne qui permet aux utilisateurs de s'adresser aux autres au sein de la plate-forme par le biais de la messagerie. Sa vision comprend l'utilisation du traitement du langage naturel et des capacités d'interface en langage naturel pour la communication intraplateforme.

- **Extensibilité** de la plate-forme : Anaplan dispose de l'une des solutions les plus extensibles du marché, largement grâce à sa plate-forme no-code/low-code. Grâce à son réseau de partenaires, les utilisateurs ont accès à des extensions prédéfinies qui peuvent être ajoutées à la plate-forme pour prendre en charge les activités fonctionnelles. Ses offres PlanIQ et Google Vertex AI permettent des capacités d'analyse en libre-service. Grâce à CloudWorks, les utilisateurs peuvent se connecter à des sources de données, telles qu'Amazon S3 et Google BigQuery.

- **Croissance de** la clientèle : La croissance de la clientèle d'une année sur l'autre reste élevée. Anaplan est très sensibilisé à la clientèle — les utilisateurs de Gartner Peer Insights citent Anaplan comme l'un des fournisseurs les plus fréquemment considérés pour les solutions SCP.

Précautions

- **Automatisation des décisions de planification** : Bien qu'Anaplan dispose d'un support adéquat pour l'utilisation de l'analyse prédictive, son application de l'analyse pour permettre une prise de décision SCP autonome est limitée par rapport aux autres fournisseurs de ce Magic Quadrant. Sa vision soutient une approche de résolution guidée qui nécessite une certaine intervention humaine, mais n'évolue pas vers une autonomie complète.

- **Gestion** des données : le soutien et la vision à court terme d'Anaplan en matière de gestion des données sont limités par rapport à ses pairs. Sa stratégie de nettoyage et de correction des données exige que les utilisateurs trouvent et corrigent les erreurs. Le développement prévu à court terme comprend des capacités pour aider les utilisateurs à trouver et à corriger les anomalies de données et à enrichir les données utilisateur avec des ensembles de données syndiqués par des tiers.

- **Gestion** des processus : les utilisateurs d'Anaplan expriment plus d'insatisfaction à l'égard de sa gestion des processus que les utilisateurs des autres fournisseurs de ce Magic Quadrant. Ils identifient la complexité lors de la configuration des flux de travail et le manque de fonctionnalités avancées de flux de travail. Cependant, Anaplan a récemment annoncé un générateur de flux de travail visuel en tant que fonctionnalité à venir.

Arkieva

Arkieva est une visionnaire dans ce Magic Quadrant. Il se concentre sur sa plate-forme Arkieva Orbit, qui offre un large éventail de capacités de planification, de la planification de la demande à la planification détaillée. Ses activités sont principalement concentrées en Amérique du Nord, en

Europe occidentale et en Asie/Pacifique (à l'exclusion du Japon), où elle cible principalement les moyennes et grandes entreprises dans les secteurs de la fabrication de procédés, de la vente en gros et de la distribution, de la vente au détail et du marché secondaire. Ses investissements se concentrent sur ses nouvelles capacités de studio de données et son architecture de canevas numériques.

Forces

- **Alignement des décisions de planification :** Arkieva a une vision forte pour aligner les décisions de planification, verticalement et horizontalement. Ceci est démontré par sa capacité à permettre aux plans d'être télescopiques en termes d'horizons temporels, copiés, comparés financièrement et opérationnellement, et analysés à tous les niveaux de la hiérarchie.

- **Gestion de l'incertitude** et de la variabilité : La vision d'Arkieva pour gérer l'incertitude et la variabilité tout au long de la chaîne d'approvisionnement est solide. Il est soutenu, entre autres, par une chaîne d'approvisionnement numérique toujours active capable de s'auto-surveiller, de s'auto-apprendre et de s'autocorriger, en vue de créer à terme une chaîne d'approvisionnement qui s'améliore d'elle-même. Des cotes de risque sont attribuées à chaque scénario généré, ce qui permet des approches de planification probabiliste.

- **S&OE et visibilité d'exécution :** La plateforme Arkieva Orbit dispose de solides capacités de visibilité S&OE et d'exécution, qui sont soutenues par des décisions pilotées par machine basées sur des mises à jour en temps réel et événementielles. Arkieva offre une gamme de fonctionnalités, allant de la détection de la demande et des promesses de commandes à la planification détaillée, ainsi qu'à l'activation de la visibilité via son centre de commande de la chaîne d'approvisionnement.

Précautions

- **Expérience utilisateur :** Arkieva est plus faible en termes de collaboration contextuelle et de transparence analytique que les autres fournisseurs de ce Magic Quadrant. Sa vision limitée de l'informatique cognitive et du traitement et de la génération du langage naturel freine sa vision de l'expérience utilisateur en ne supprimant pas l'expérience de planification de la « boîte noire » pour les utilisateurs.

- **Stratégie géographique** : Arkieva n'a de bureaux que dans quatre des huit régions définies dans ce Magic Quadrant : Amérique du Nord, Europe de l'Ouest, Europe de l'Est et Asie/Pacifique (à l'exclusion du Japon). Combiné à un faible nombre de distributeurs dans le monde, cela affaiblit la stratégie géographique globale d'Arkieva.

- **Services de mise en œuvre tiers :** Bien qu'elle ait développé son réseau de partenaires au cours des deux dernières années, Arkieva compte toujours beaucoup moins de partenaires d'implémentation tiers que les autres fournisseurs de ce Magic Quadrant. Cela laisse aux clients moins de choix en ce qui concerne les partenaires disponibles qui peuvent être utilisés dans leurs parcours de mise en œuvre.

Yonder bleu

Blue Yonder est un leader dans ce Magic Quadrant. Sa plate-forme de planification Luminate est axée sur la planification multi-entreprises de bout en bout avec un large éventail de fonctionnalités. Les opérations de Blue Yonder sont géographiquement diversifiées et soutiennent principalement les grandes entreprises de toutes les industries couvertes par ce Magic Quadrant. En 2022, Blue Yonder a annoncé son intention d'investir massivement dans la R&D au cours des trois prochaines années dans l'ensemble de son portefeuille de produits. Cet investissement permettra de restructurer toutes les capacités SCP de Blue Yonder sur une plate-forme low-code native du cloud.

Forces

- **Alignement** des décisions : L'investissement accru de Blue Yonder dans la R&D dans l'ensemble de son portefeuille de produits reflète sa vision d'un alignement plus serré des processus et des décisions à travers les horizons temporels de planification et dans l'ensemble de l'entreprise, s'étendant davantage à un alignement plus étroit de la planification multientreprise. L'alignement entre les horizons de planification comprend un mécanisme de rétroaction en boucle fermée. La vision de Blue Yonder pour la planification multi-entreprises est de configurer tous les processus et sous-processus ensemble et de mesurer l'adhésion aux processus.

- **Composabilité de la plate-forme** : Blue Yonder évolue vers une architecture de microservices complète. Les utilisateurs pourront décomposer une fonction en microservices indépendants qui pourront ensuite être composés dans un flux de travail. Blue Yonder dispose actuellement de plus de 200 microservices SCP disponibles, combinés à un catalogue d'API publié et à un portail de passerelle API.

- **Couverture des capacités** : Blue Yonder dispose de capacités étendues et approfondies pour prendre en charge les différentes couches de planification. Les capacités vont de la conception du réseau, de l'optimisation des stocks et de la planification de la demande à la planification prometteuse et détaillée des commandes.

Précautions

- **Prix** : Blue Yonder continue d'offrir sa solution SCP à un prix plus élevé, par rapport aux autres fournisseurs de ce Magic Quadrant. De plus, son modèle de tarification est moins transparent que ceux des autres fournisseurs. Compte tenu du vaste paysage actuel de produits et d'applications SCP de Blue Yonder, les clients de Gartner expriment leur frustration d'avoir à essayer de comprendre quels produits sont nécessaires pour prendre en charge leurs processus SCP de bout en bout.

- **Jumeau** de chaîne d'approvisionnement numérique : Blue Yonder fait évoluer sa tour de contrôle Luminate en un jumeau de chaîne d'approvisionnement numérique. Cependant, sa vision dans ce domaine est à la traîne par rapport à celle des autres fournisseurs de ce Magic Quadrant en ce qui concerne la façon dont le modèle est dérivé - Blue Yonder repose davantage sur un modèle dérivé de l'homme qu'un modèle entièrement dérivé des données.

- **Service et assistance** : le support de Blue Yonder pour les services de mise en œuvre a augmenté plus lentement que celui des autres fournisseurs de ce Magic Quadrant. Bien qu'une formation sur les produits soit disponible, Blue Yonder ne dispose pas d'un programme de certification standard pour les utilisateurs finaux. La création d'un programme de certification SCP pour les utilisateurs techniques et de processus pourrait permettre aux utilisateurs finaux d'être plus autonomes.

Coupa

Coupa est un challenger dans ce Magic Quadrant. En mettant l'accent sur sa plate-forme de gestion des dépenses d'affaires (BSM), Coupa offre des capacités allant de la conception et de l'optimisation du réseau à la planification de la demande, à l'optimisation des stocks et à la planification de la production. Ses opérations sont géographiquement diversifiées et elle soutient les moyennes et grandes entreprises dans de nombreux secteurs. Les investissements de Coupa se concentrent sur la création de solutions cloud évolutives et intégrées pour répondre aux besoins de ses clients en matière de SCP numérique au moyen du jumeau de la chaîne d'approvisionnement numérique, des progrès de l'IA et du ML, du big data et de l'intelligence en boucle fermée.

Forces

- Automatisation des décisions **de planification:** Coupa a une vision forte de l'automatisation des décisions de planification. Du nettoyage des données et des robots d'IA qui peuvent exécuter des flux de travail, tels que la génération de scénarios et l'analyse post-jeu, au classement des opportunités et des options, la plate-forme BSM de Coupa aide les utilisateurs à se concentrer sur la prise de décisions de meilleure qualité, plutôt que d'effectuer des tâches répétitives.

- **Configurer la couverture des fonctionnalités** : Avec l'accent mis par Coupa sur la conception de réseau, l'optimisation et les capacités de planification de la demande à long terme, il se démarque dans la couche de configuration de la planification. Cette force est soutenue par la capacité de planifier pour un large éventail de types de ressources, y compris la gestion environnementale, sociale et de gouvernance (ESG) et la gestion de la main-d'œuvre.

- **Expérience client** : Coupa obtient des scores très élevés pour tous les sous-critères de l'expérience client, en grande partie sur la base des commentaires positifs des clients, d'une forte tendance des clients à recommander Coupa et d'un bon service client et d'un bon support technique.

Précautions

- **Vision** pour S&OE : La vision de Coupa pour soutenir les processus S&OE est plus faible que celle des autres fournisseurs évalués dans ce Magic Quadrant. La gestion d'événements, les promesses de commandes et la planification détaillée ne sont pas prises en charge, car sa feuille de route est priorisée en fonction des besoins actuels de ses clients.

- **Expérience utilisateur** : Bien que Coupa ait une vision pour une interface utilisateur harmonisée avec des écrans utilisateur configurables, des mises en page et des analyses prédictives et prescriptives plug-in, elle est comparativement plus faible en ce qui concerne la collaboration contextuelle, l'utilisation multi-appareils et l'explicabilité des résultats de planification.

- **Options de déploiement** : La stratégie cloud SCP de Coupa évolue dans une direction axée sur le cloud, mais elle poursuit toujours une approche hybride d'intégration de plate-forme et de bureau. Seule la version de bureau peut être déployée dans un cloud privé (comme sur Google, Azure ou Amazon Web Services [AWS]), et seul Amazon Web Services (AWS) est entièrement disponible pour ses clients pour le déploiement. Son application Supplier Collaboration est 100% basée sur le cloud et prend en charge AWS et Microsoft Azure.

Dassault Systèmes

Dassault Systèmes est un visionnaire dans ce Magic Quadrant. Son principal produit prenant en charge la SCP est DELMIA Quintiq, qui se concentre sur la planification intégrée à travers les types de ressources, telles que les personnes, les matériaux, les machines et les transports. Ses activités sont principalement en Amérique du Nord, en Europe et en Asie/Pacifique, et ses clients ont tendance à être des entreprises de taille moyenne ou de grande taille dans les industries de fabrication de procédés et discrètes. Ses investissements se concentrent sur l'intégration et l'exploitation de la suite d'applications Dassault et son utilisation pour améliorer la visibilité, augmentant ainsi la qualité de la prise de décision en matière de planification.

Forces
- **Étendue des capacités** : Dassault Systèmes a une vision forte pour prendre en charge les différentes couches de planification. Cela inclut des capacités allant de la conception de réseau et de l'optimisation des stocks à la promesse de commandes, à la planification détaillée et à une large visibilité de l'exécution.

- **Modélisation des contraintes** : Dassault Systèmes a de l'expérience et peut gérer une grande complexité et de nombreux types de contraintes, et il peut planifier avec celles-ci jusqu'au niveau de la planification de la production et de l'ordonnancement détaillé. Il utilise ensuite sa large gamme d'analyses pour générer des plans optimisés à travers les différents niveaux d'une chaîne d'approvisionnement.

- **Engagement client et formation** : L'Université 3DS propose des programmes de formation et des certifications standardisés pour assurer l'adoption par les utilisateurs finaux. En outre, Dassault Systèmes a une approche très structurée et large de l'interaction avec les clients, en utilisant divers canaux tels que des événements, des comités consultatifs de clients, des communautés d'utilisateurs, des webinaires et des bulletins d'information.

Précautions
- **Interface utilisateur/expérience** : La vision de Dassault Systèmes en matière d'expérience utilisateur inclut le développement d'une interface utilisateur modernisée, mais elle a du mal à fournir une expérience utilisateur cohérente dans toutes les applications. Des éléments tels

que la collaboration contextuelle, l'utilisation de plusieurs appareils pour entreprendre la planification et l'utilisation de l'informatique cognitive pour améliorer l'expérience utilisateur en sont encore aux premiers stades de développement.

- **Couverture capacitaire** : Malgré la vision forte de Dassault Systèmes en matière de capacités pour soutenir les différentes couches de prise de décision en matière de planification, sa couverture native actuelle prête à l'emploi est inférieure à la moyenne par rapport à ses pairs. Sa plate-forme a de nombreuses capacités, mais plusieurs domaines nécessitent une configuration majeure ou mineure, ou une personnalisation, pour obtenir les résultats souhaités.

- **Services** de mise en œuvre des fournisseurs : Contrairement à bon nombre de ses pairs sur le marché des solutions SCP, Dassault Systèmes n'a pas développé ses services de mise en œuvre des fournisseurs au cours des deux dernières années. Bien qu'il utilise un nombre croissant de ressources tierces certifiées pour prendre en charge les implémentations des clients, de nombreuses organisations d'utilisateurs finaux préfèrent également que le fournisseur soit directement impliqué.

e2ouvrir

e2open est un visionnaire dans ce Magic Quadrant. Ses produits SCP se concentrent largement sur la planification intégrée, avec un soutien pour la planification de la demande et la planification du réseau d'approvisionnement. Ses opérations sont principalement en Amérique du Nord, en Europe occidentale et en Asie/Pacifique, et ses clients ont tendance à être de grandes entreprises dans les industries de transformation et de fabrication discrète. Au cours des deux dernières années, e2open a élargi son portefeuille de produits pour inclure le commerce électronique multitransporteur, l'expédition et la gestion du transport. Ceci, à son tour, a élargi son soutien à la gestion de la chaîne d'approvisionnement de bout en bout, de la planification de la demande à la livraison des produits.

Forces

- **Gestion de l'incertitude** : e2open est un pionnier de la détection de la demande et a lancé une application de détection de l'offre fin 2021. La détection de l'offre utilise des méthodes probabilistes pour prédire la probabilité de perturbations affectant les plans d'approvisionnement et l'exécution de la chaîne d'approvisionnement. Ces méthodes probabilistes sont développées pour intégrer les risques et soutenir la prise de décision autonome.

- **Tactical planning:** Through its Harmony platform, e2open users have end-to-end visibility across planning and execution, aided by real-time signals from the platform's execution systems that can inform short-term planning decisions. e2open's vision for the use of analytics further supports this direction, as it includes the use of deep reinforcement learning to test thousands of simulations and probabilities, and deep learning to find indirect correlations in data.

- **Customer engagement**: e2open's strategy for customer engagement includes hosting three user conferences each year and additional customer councils on specialized topics. These are

designed to facilitate knowledge sharing among e2open users. Additionally, the e2open University offers e-learning and instructor-led training.

- **Capability coverage:** Despite a solid vision for capabilities to support the different layers of SCP, e2open's current native, out-of-the-box coverage is below average, compared with its peers. Many things are possible using its platform, but areas such as production scheduling and network design are covered neither natively nor through partnerships.

- **Platform extensibility:** e2open's vision to support self-service analytics is lagging, compared with its peers. Currently, it prefers its customers to use embedded e2open analytics or to have systems integrator partners or third-party developers build analytics.

- **Marketing execution:** e2open's brand awareness in the SCP solution market is below average for vendors in this Magic Quadrant. It offers comparatively few marketing materials, such as webinars, case studies, videos and press releases. Additionally, in 2022, e2open experienced slower SCP customer growth than other vendors in this Magic Quadrant.

FuturMaster

FuturMaster is a Niche Player in this Magic Quadrant. Its Bloom Platform supports end-to-end SCP, with an emphasis on demand and replenishment planning. The company's operations mostly focus on Western Europe and Asia/Pacific, and its clients tend to be midsize and large enterprises in the food and beverage and consumer goods industries. Its strategy for its SCP solution is to use microservices and APIs in a cloud-native environment to enable its clients to address hypervolatility by planning at scale and closer to consumers.

Strengths

- **Decision support guidance:** FuturMaster has developed a Diagnostic-Predictive-Value framework designed to ensure that a client's strategy is well understood and integrated into the planning solution. This supports the building of a best-fit solution to maximize customer value.

- **Customer functional penetration:** FuturMaster customers report that they have a tendency to use its solution broadly to support their end-to-end SCP needs. This speaks positively for the overall viability of the solution.

- **Pricing:** FuturMaster offers a straightforward pricing model, based on the module(s) purchased and the type of users (full, collaborative or viewer). Furthermore, the cost of the solution tends to be lower than that of solutions offered by this vendor's peers, making it more affordable for customers.

Cautions

- **Data sources:** FuturMaster typically pulls data from customers' internal systems and data lakes, which may include some external data, but is still at an early phase when it comes to bringing a broad range of external data into its solution. The company is evaluating a number of partnerships to support this intention.

- **Geographic strategy:** FuturMaster is a relatively small company with a limited number of offices around the world. Additionally, its number of distributors is low; and even though it has a fair number of value-added resellers, its overall geographic strategy is below average for vendors in this Magic Quadrant.

- **Customer awareness:** FuturMaster is not as visible in the market as its peers and does not compete in technology selections. This may reflect its focus on primarily two industries (food and beverage, and consumer packaged goods [CPG]), which limits its visibility in other sectors.

GAINSystems

GAINSystems is a Niche Player in this Magic Quadrant. Its GAINS solution encompasses enterprise and multienterprise planning, including demand management, inventory optimization, supply planning and network design. Its operations are mostly focused in North America, Latin America, Europe and Australia. It focuses on enterprises in industrial manufacturing, defense and distribution-intensive industries such as distribution, retail and spare parts/maintenance, repair and operations. With the goal of providing access to advanced planning capabilities to inventory-intensive companies of different sizes, its investment strategy focuses on automating and augmenting planning decisions with ML and speeding up the planning decision-making process.

Strengths

- **Decision alignment:** GAINSystems' vision for decision alignment across an end-to-end multienterprise network and across all the layers of SCP is strong. To complement this, its vision also covers capabilities to support a very broad range of planning decision making, including an emphasis on advanced inventory optimization and a specific focus on the intersection of supply, demand and replenishment in distribution-intensive businesses.

- **Range of analytics:** GAINSystems' current state and vision for providing a range of analytics is very broad, and includes various aspects of heuristics, optimizations, simulations and ML. This gives users a solid range of choice when generating plans across the supply chain.

- **Customer experience:** GAINSystems' customers have communicated positive experiences with its customer service and support. GAINSystems also gets recognized for more tactical areas, such as selection engagement, contract negotiation and technical support.

Cautions

- **Composability:** GAINSystems' vision for connecting through the use of APIs is evolving positively, but its overall vision for composability related to microservices is less developed. In terms of extensibility, plug-in of analytics and user-defined/custom inputs to out-of-the-box models are supported, but customers have to rely on the GAINS lab if they want to build custom-made models. This makes these adjustments a more cumbersome task for end users.

- **Marketing execution:** Limited customer awareness has led fewer Gartner clients to include GAINSystems in SCP technology evaluations, which results in a below-average rating among the vendors in this Magic Quadrant.

- **Third-party implementation services**: GAINSystems has made the strategic choice to have a limited number of third-party implementation service partners. This limits customers' choice when it comes to implementation support.

ICRON

ICRON is a Niche Player in this Magic Quadrant. Its new ICRON Customer Centric Supply Chain Planning solution offers a broad range of planning capabilities, from demand planning through to detailed scheduling. Its operations focus mostly on Western Europe, Eastern Europe and Asia/Pacific, and its clients tend to be small and midsize organizations in industries such as chemicals, industrial manufacturing and consumer durables. Its investments focus on further developing its platform by using cloud capabilities and ensuring explainable decision-making support that embeds risk modeling/assessment in short-, mid- and long-range planning.

Strengths
- **Range of analytics**: ICRON's vision for the range of analytics includes heuristics, optimization, simulation and much more. For each of these categories, it aims to provide a broad range of options to ensure flexibility to handle different planning challenges.

- **Plan granularity and latency**: ICRON's vision includes planning at detailed levels by using order promising, detailed scheduling and strong attribute-based planning capabilities. In support of this, it also has a strong vision for bringing very detailed, real-time data and data streams into the platform.

- **Functional capabilities:** Across the 15 critical capabilities evaluated, ICRON scores above average in 10, and demonstrates no significant weak areas. Its best performance is within supply planning. It supports a broad range of resource types to plan with, extending beyond the traditional SCP field into areas such as finance and energy.

Cautions
- **User experience**: ICRON envisions a consistent and flexible user experience, but its vision could be stronger in areas such as contextual collaboration, provision of analytics transparency to planning results and cognitive computing (currently being explored).

- **Geographic strategy:** ICRON's number of offices, distributors and value-added resellers are all low, compared with other vendors in this Magic Quadrant. This may present challenges to large, global companies that want to deploy their SCP solution across many regions.

- **Implementation services**: ICRON's growth in internal implementation resources fell from 2020 to 2021, though it improved in 2022. Furthermore, ICRON has fewer third-party implementation partners than its peers, giving customers less choice of support for their implementation journeys.

John Galt Solutions

John Galt Solutions is a Leader in this Magic Quadrant. Its Atlas Planning Platform focuses on delivering a broad range of end-to-end planning capabilities, from strategic network modeling to production planning. Its operations are mainly focused in North America, Western Europe and Asia/Pacific, where it targets mainly midsize and large enterprises in process manufacturing, discrete manufacturing, and wholesale/distribution. Its investment focus is on improving the digital planning ecosystem of its customers through architectural improvements, convergence of finance, planning and execution, and user experience upgrades.

Strengths
- **Capability breadth:** John Galt Solutions has a strong vision for covering all planning time horizons with its own products and services or via partnerships. Its vision ranges from long-term supply chain modeling to the provision of predictive and prescriptive recommendations, while also providing real-time and streaming data for execution visibility.

- **Functional capabilities:** John Galt Solutions scores above average for 13 of the 15 critical capabilities, giving it a strong score overall for the functional capabilities of its solution. It scored significantly above average for basic demand-planning functionalities and process management capabilities.

- **Critical issue resolution and customer support**: John Galt Solutions receives strong customer feedback for customer support. This may be indicative of its similarly strong support for the resolution of critical issues, which end-user organizations value highly as their dependency on a SCP solution increases.

Cautions
- **Distribution and reseller strategy**: John Galt Solutions has fewer distributors and value-added resellers globally than most of the vendors in this Magic Quadrant. It has less coverage in regions such as Latin America, Eastern Europe, Middle East and North Africa, and Japan.

- **Implementation partners:** John Galt Solutions has fewer third-party implementation partners than other vendors in this Magic Quadrant and it lacks certification programs for the partners it does have. This limits the choice of certified partners for customers during their implementation journey.

- **Composability:** John Galt Solutions' vision for composability is weaker than that of other vendors in this Magic Quadrant. Although an API catalog exists, and an API portal can be accessed publicly by customers and partners, there is no structured developer network or marketplace.

Kinaxis

Kinaxis is a Leader in this Magic Quadrant. Its RapidResponse solution is focused on delivering concurrent planning across a broad range of SCP capabilities, from S&OP to production planning to execution. Kinaxis' operations are mostly focused in North America, Western Europe and Asia/Pacific, and its clients tend to be midsize and large enterprises in industries such as consumer electronics, industrial discrete manufacturing, pharmaceuticals and consumer

products. Kinaxis' investment focus is on bringing in ML and big data capabilities through its Self-Healing Supply Chain and Planning.AI capabilities, enabling its ability to support operational decision making.

Strengths

- **Planning automation and alignment:** Kinaxis has a strong vision for supporting its customers' requirements for automating and aligning planning decisions from strategic through to operational planning layers, as well as for horizontal alignment, which extends to multienterprise planning. Automation is incorporated into many areas, from data aggregation and enrichment to automated scenario planning.

- **Management of uncertainty and variability:** Kinaxis has a strong vision for managing uncertainty and variability in relation to SCP. This is supported by its ability to consider demand and supply uncertainties by looking at a range of outcomes and allowing users to make trade-off decisions, depending on risks, rewards or costs — both financial and ESG-related.

- **Functional capabilities:** Kinaxis scored above average for 14 of the 15 critical capabilities. It scored at the very top for basic supply planning functionalities, solution extensibility, multienterprise planning capabilities, aligning decisions across time horizons and granularities, scenario management, user experience, and solution scalability and performance/speed.

Cautions

- **Geographic strategy:** Kinaxis has offices in only five of the eight regions covered in this Magic Quadrant, which is fewer than other vendors evaluated. However, its network of distributors and value-added resellers compensates for this.

- **Pricing:** Kinaxis' pricing level is above the average for vendors in this Magic Quadrant. Additionally, although Kinaxis has worked to simplify its pricing model with its Planning One offering, combined with a focus on value-based pricing and total cost of ownership, its pricing model is still based on a range of factors, including capabilities, users, and distribution and manufacturing sites.

- **Planning granularity:** Kinaxis' current planning granularity is weaker than that of other vendors evaluated in this Magic Quadrant. It currently lacks the native ability to plan sub-daily for functions such as production scheduling, but is bridging this gap by means of an extensive partnership strategy, while deepening the integration of its recent acquisition of MPO.

Logility

Logility is a Challenger in this Magic Quadrant. Its Logility Digital Supply Chain Platform is focused on providing end-to-end enterprise and multienterprise planning. Logility's operations are mainly focused in North America, Western Europe and Asia/Pacific, where it targets midsize and large enterprises in a range of manufacturing and retail sectors. In 2022, Logility announced the acquisition of Starboard, a supply chain network design software company. This acquisition complements the pre-existing features of Logility's solutions, while bolstering its supply chain modeling and design capabilities.

Strengths

- **Decision alignment**: Logility has a strong vision for providing planning support across strategic, tactical and operational time horizons, and is developing a governance and orchestration approach to align data across planning horizons for the different personas involved in an end-to-end planning process. It has a vision to automate multienterprise planning processes across planning phases and to align processes and decisions through granular reconciliation.

- **Functional capabilities**: Logility performs very well across different functional capabilities by utilizing its current solution. It does especially well in areas such as demand planning, supply planning and advanced planning, which includes multiechelon inventory optimization (MEIO) and network modeling.

- **Capability coverage**: Of the best-of-breed vendors, Logility has one of the most comprehensive portfolios of applications that support SCP. This enables its users to support S&OE, S&OP and integrated business planning (IBP) processes concurrently within the Logility Digital Supply Chain Platform.

Cautions

- **Global reach**: Logility has a smaller geographic footprint than other vendors in this Magic Quadrant, having consolidated physical offices into regional hubs as it implemented a hybrid work model after the COVID-19 pandemic. Furthermore, it does not use distribution partners as part of its network strategy and has a limited number of value-added resellers.

- **Scope of deployments**: Currently, Logility customers are slightly less likely to deploy at a companywide level. According to their reports, they are also less likely to have deployed Logility's platform as the sole SCP solution in their planning environment. However, since Logility plans to focus on enterprise accounts, this situation may change in future.

- **Cloud deployments**: Compared with most other vendors in this Magic Quadrant, Logility has a lower percentage of customers that have deployed their primary SCP solution in a cloud. It also has a lower percentage of on-premises customers that have migrated to cloud deployment models. Supporting its significant on-premises customer base, and/or transitioning them to the cloud version, risks diverting resources away from development of its cloud solution.

o9 Solutions

o9 Solutions is a Leader in this Magic Quadrant. Its o9 platform is broadly focused on planning capabilities across demand and supply. Its operations are mainly focused in North America, Western Europe, Eastern Europe and Asia/Pacific, and its clients tend to be large enterprises. It targets a range of process and discrete manufacturing industries and retail sectors. In 2022, it unveiled a building-block-based methodology designed to support shorter deployment timelines and improved implementation quality.

Strengths

- **Decision automation**: The o9 platform was purpose-built to enable automation of functional tasks and decisions. Its vision for the use of digital technologies like the Internet of Things

(IoT), deep learning and graph technologies is strong. When applied to SCP, these digital technologies can automatically correct data, update business rules as business conditions change, create scenarios and prescribe recommendations to mitigate predicted disruptions.

- **Data sources and management:** A typical o9 instance can ingest internal data, partner data and third-party data signals. Users can also access o9's market knowledge hub, which houses time series data from several sources of public, syndicated and weather data. The o9 platform can also store unstructured data, such as social media posts and free text commentary, and then use natural language processing to help structure this data for use by planning teams.

- **Cloud strategy:** o9 Solutions has a cloud-agnostic strategy. Users can deploy the o9 platform in any private cloud environment or in hyperscale cloud environments offered by AWS, Microsoft (Azure), Google (Google Cloud Platform) and Samsung (Samsung Cloud). It offers both single-tenant and multitenant options.

Cautions

- **Global reach:** o9 Solutions has a more limited physical presence across the regions evaluated in this Magic Quadrant, especially with regard to sales, implementation and support, even though it experienced strong employee growth globally in the past year. It has developed a distribution network over the past few years, but currently lacks a value-added reseller strategy.

- **Subscription and services price:** o9 Solutions' subscriptions have above-average price points, compared with those of other vendors in this Magic Quadrant, for instances of similar scope and scale. This might be due to this vendor's focus on providing a lower total cost of ownership throughout the deployment life cycle. Also, it has a higher software-to-services ratio than most vendors, which means the cost of its services tends to be higher than that of services from other vendors in this Magic Quadrant.

- **Customer deployments:** o9's focus on supporting large enterprises' digital SCP initiatives contributes to a lower number of fully deployed instances, compared with other vendors in this Magic Quadrant. Also, its customer functional penetration is lower, as o9 customers are more likely to use the o9 platform alongside existing tools to support end-to-end SCP and to have deployed the platform at a divisional or regional level, rather than companywide.

OMP

OMP is a Leader in this Magic Quadrant. Its Unison Planning solution covers nearly all aspects of SCP, from network modeling through to detailed scheduling. Its operations are mostly focused in Europe and North America, and its clients tend to be large enterprises in process-manufacturing industries. OMP is investing heavily in capabilities to enable further scaling of the underlying architecture to absorb, among other things, more data and more users, as well as in broadening its use of ML, especially for supply planning.

Strengths

- **Capability breadth:** OMP has a strong vision to support all the layers of planning, from short-term to midterm and long-term planning, combined with a strong vision for enabling execution

visibility. This is further complemented by a strong vision for planning beyond the individual enterprise, to enable end-to-end multienterprise planning.

- **Plan granularity and latency:** OMP's vision includes planning at very detailed levels by using its strong detailed scheduling capabilities and attribute-based planning. To support this vision, it also has a strong vision for bringing very detailed, real-time data and data streams into its platform from different sources.

- **Overall viability:** OMP reports strong financial results. Its users have a high tendency to use its solution as a single global reference for planning, which means they are more likely to continue investing in, and evolving, their OMP instance.

Cautions

- **Industry strategy:** OMP has a strong focus on process manufacturing industries, such as chemicals, pharmaceuticals and CPG, but much less focus on discrete-manufacturing and distribution-intensive industries. This can prove challenging for companies with a diverse product portfolio that requires considerable experience in several sectors.

- **Scalability:** OMP's vision for scalability is constrained by commercial limitations in terms of, for example, number of scenarios, the amount of historical data stored in the platform, and a maximum storage size for its 360-degree analytics capabilities. Although these limits are fairly high, they mean that the cost for customers may increase as they expand their use of the solution.

- **Price level:** OMP has a simple pricing model that prices by functionality and per user, but the overall price is typically high, compared with the prices charged by other vendors in this Magic Quadrant.

Oracle

Oracle is a Leader in this Magic Quadrant. Its Oracle Cloud Supply Chain Planning solution focuses on S&OP through demand management and supply network planning. Its operations are geographically diversified, and its clients tend to be midsize and large enterprises needing support for end-to-end supply chain management and manufacturing processes. Oracle is focusing its investments on leveraging its cloud technology expertise, enabling composability, smarter decision making through ML and other advanced capabilities, and building out industry-specific capabilities for a range of verticals.

Strengths

- **Planning decision automation:** Oracle has a strong vision for the automation of planning decisions for its customers. Oracle's Planning Advisor is instrumental in providing cause-and-effect visibility, and provides users with both predictive and prescriptive recommendations for demand and supply planning.

- **Planning granularity:** Oracle's vision for planning granularity is strong. With the ability to plan at any granularity, from years for S&OP to seconds for production scheduling, as well as with

attributes at the item level and monetization at the aggregate level, Oracle's solution enables customers to plan at the required level.

- **Pricing**: The price of Oracle's solution is attractive, compared with the prices charged by other vendors in this Magic Quadrant. Additionally, its pricing model is very simple (being based on modules and number of users), which makes the selection process simpler and more transparent for users.

Cautions

- **User experience**: Oracle's vision for its next-generation user interface has not reached full maturity — significant development work lies ahead to implement it fully within the company's SCP solutions. While all the applications support configurable user screens, layouts and various tables, they currently lack a unified user experience.

- **Functional capabilities**: Oracle scored below average for 10 of the 15 critical capabilities. Its strongest showings were for data integration capabilities and planning decision automation, but it scored significantly lower than the average for user experience and advanced planning capabilities.

- **Deployment options**: Oracle's solution can be deployed in a private or public cloud, but is limited to Oracle Cloud Infrastructure (OCI), which can be challenging for customers with a preference for other hyperscale clouds.

QAD

QAD is a Niche Player in this Magic Quadrant. Its QAD Digital Supply Chain Planning (DSCP) solution mainly focuses on support for end-to-end SCP, covering aspects from demand planning and S&OP through to production and procurement planning. QAD's operations are geographically diversified. Its clients tend to be midsize organizations in process and subprocess manufacturing industries, but QAD has also deployed its solution for discrete-manufacturing and distribution-intensive companies. QAD's investments focus on proliferating its real-time digital data signals, which use the IoT to accelerate decision-making support.

Strengths

- **Range of resource types**: QAD's vision for a range of resource types is wide-ranging, covering traditional supply chain resources and extending to finance and ESG resources (such as energy, water and carbon). This benefits customers mature enough to take a broad range of factors into account when creating plans.

- **Geographic strategy**: QAD has offices in many regions and numerous distribution and reselling partners. This gives customers more choice when implementing its DSCP solution.

- **Pricing**: QAD has a simple pricing model, with only two components (modules and users). Additionally, its price level is lower than those of its peers, which makes its solution more affordable for organizations and increases the likelihood of them achieving a swift ROI.

Cautions

- **Range of analytics**: QAD offers various heuristics and optimization algorithms in its DSCP solution to help generate feasible plans, but is lacking in terms of vision for reinforcement ML and simulations.

- **Customer experience**: QAD performs below average for customer service and support, and for evaluation and contract negotiation. The same is true for "customer stickiness" (the tendency for customers to renew subscriptions and recommend the solution to others), which results in an overall customer experience below the average for vendors in this Magic Quadrant.

- **Deployment options**: QAD offers fewer deployment options than its peers. Its DSCP solution can currently only be deployed in the AWS Cloud, which may deter organizations that prefer to use other hyperscale clouds.

RELEX Solutions

RELEX Solutions is a Challenger in this Magic Quadrant. The RELEX Supply Chain & Retail Planning Platform supports integrated demand, inventory and supply planning. Its operations are mainly focused in Europe, followed by North America, and its clients tend to be midsize and large enterprises in the retail, grocery, and wholesale/distribution industries. RELEX is investing heavily in R&D, with a focus on exploiting the increasing availability and richness of data through the use of AI, while also looking to close the gap between S&OP and S&OE activities, especially for its CPG customers.

Strengths
- **Data sources**: RELEX's vision for data sources and data management includes using data from internal sources and third-party data providers to enable high-frequency data uploads for SCP. This will be very valuable in many areas, such as for replenishment of ultra-fresh items in stores and for event-driven allocations.

- **Range of analytics**: RELEX's vision covers a broad range of analytics types, such as heuristics, optimization and ML. This gives customers a good range of choices when creating demand and supply plans.

- **Customer experience**: RELEX customers have provided strong feedback about its customer service and support, as well as the evaluation and contract negotiation process. Additionally, they tend to stay with RELEX once they have engaged with it.

Cautions
- **User interface**: In 2022, RELEX acquired Formulate to strengthen its platform's promotional planning and analytics capabilities. However, RELEX's vision does not extend to full unification of the Formulate and RELEX Supply Chain & Retail Planning Platform user interfaces. Its vision focuses on achieving similar user experiences, while aligning experiences with the different personas (promotion planner and supply planner) who use the capabilities.

- **Industry strategy**: RELEX focuses largely on the retail sector. This results in less focus on a broad range of industries across process and discrete manufacturing than is the case with its

peers in this Magic Quadrant. This may prove challenging for customers with highly diverse product portfolios and business units that cover several industries.

- **Pricing:** Pricing for RELEX's platform is based on the functionality deployed and the size and complexity of the business. The definition of complexity varies, based on the customer setup, which makes RELEX's pricing model slightly less transparent, but it aims to take into account the customer's specific use case. Additionally, RELEX prices its solution slightly above the average for vendors in this Magic Quadrant.

SAP

SAP is a Challenger in this Magic Quadrant. Its main SCP solution is SAP Integrated Business Planning (IBP), which supports demand planning, demand-driven material requirements planning, inventory, supply planning and S&OP. It is extended with solutions for scheduling and real-time order promising that are natively integrated. SAP is geographically diverse and targets midsize and large enterprises in all industries. In 2022, SAP announced the release of the SAP Business Technology Platform (BTP), which allows users to build low-code/no-code application extensions into SAP IBP.

Strengths

- **Global strategy:** SAP has one of the largest footprints of the vendors in this Magic Quadrant, with a global partner network comprising many distribution partners, value-added resellers and implementation partners across the eight regions. It also has the widest industry coverage, serving more of the industries covered in this Magic Quadrant than any other vendor, which gives it flexibility and enables it to provide broad support to customers.

- **Customer growth:** Year-over-year growth in the number of customers subscribing to SAP IBP is high. Gartner Peer Insights data shows that most SAP IBP customers deploy its tool to support demand planning, supply planning and S&OP. With its cloud-native platform, SAP IBP is an attractive option for both large and midmarket enterprises.

- **Capability coverage:** SAP has a broad portfolio of applications with the essential functional capabilities needed to support end-to-end SCP. It is continually investing in innovation to refine its SCP platform, so that it is easier for users to access and align all the relevant data needed to help with decision making in relation to planning.

Cautions

- **Decision automation:** SAP's vision for decision automation is functionally focused, envisaging, for example, automation of demand forecast generation and inventory safety stock setting; it has little vision for the application of automation across an end-to-end planning environment. Its vision for automation centers on ML. Adoption of other types of AI requires extensibility of the platform, namely using SAP BTP, which offers capabilities for no-code/low-code extensions with SAP Build.

- **S&OE support:** SAP's vision for supporting SCP in short-term time horizons is weaker than those of other vendors in this Magic Quadrant. It has a narrow vision for the use of execution-

level data, relying mostly on signals contained in other SAP applications; this is something that companies with a diverse landscape of solutions (SAP and non-SAP) must be mindful of.

- **Customer enablement:** SAP offers standard training for a broad variety of audiences, but its certification program is directed toward consultants rather than customers. Gartner Peer Insights data shows that SAP IBP customers are less satisfied with the service and support they receive from SAP than are the customers of other vendors in this Magic Quadrant; it is important for potential customers of SAP to mitigate this potential risk.

Slimstock

Slimstock is a Niche Player in this Magic Quadrant. Its Slim4 product focuses on demand and replenishment planning, and inventory management. Slimstock's operations are mostly focused in Western Europe and North America. It provides support mainly to midsize enterprises in all industries covered in this Magic Quadrant. Its development efforts center on enhancing and expanding its capabilities in areas such as ML, network planning, capacity planning and scenario planning.

Strengths
- **Sales strategy:** Slimstock added a greater-than-average percentage of SCP customers to its client base over the past year. To achieve and support this growth, it substantially increased the number of employees supporting SCP (including sales, marketing and consulting).

- **Decision support management:** Slimstock's vision for decision support management includes a framework that guides customers wanting to become more decision-centric by helping to break down decisions into decision components. These components include quantitative and qualitative elements to determine where more automation can be applied, helping customers to achieve their automation goals.

- **Pricing:** Slimstock's pricing model for Slim4 is simple and transparent, being based on modules, users and locations. Furthermore, the solution is less expensive than those of other vendors in this Magic Quadrant.

Cautions
- **Range of resource types:** Although Slim4 supports core planning requirements for demand, supply, S&OP and financial planning, Slimstock's overall vision for planning a diverse set of resources is limited. Use cases focus on material constraints, spare parts planning and some logistics, containerization and financial planning. Unlike many vendors, Slimstock lacks the vision and ability to consider other areas, such as labor and work center constraints.

- **Digital supply chain twin strategy:** Slimstock has a more conservative digital supply chain twin vision than other vendors in this Magic Quadrant. Its vision covers elements of the supply chain twin definition (such as the use of real-time transactions and visualizations), but is limited in areas such as the use of probability distributions, derivation of a digital twin on the basis of data, and the use of a graph database to support modeling of configuration and correlations.

- **Customer awareness:** Slimstock has a strong focus on midsize businesses, but is not as visible in the market as its peers across the broad range of company sizes considered in this Magic Quadrant. It scored below the average for customer awareness, and features less often in customers' evaluations than other vendors in this Magic Quadrant.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

The following vendors were added to the Magic Quadrant because they had sufficient market momentum, as defined by Gartner in its SCP solution market momentum index (part of the inclusion criteria):

- FuturMaster

- ICRON

- QAD

Dropped

The following vendors no longer appear in the Magic Quadrant because they did not meet the inclusion criteria for market momentum:

- Blue Ridge

- Infor

- Manhattan Associates

- ToolsGroup

- Wolters Kluwer

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, vendors had to meet three criteria:

1. All of the following SCP solution capabilities had to be commercially available (in general availability) as of 30 September 2022. Eligibility for initial consideration was determined by reviewing publicly available sources of information, including the vendor's website, for mentions of the following capabilities as part of a standard product offering:

- **Demand planning:** Support for development of a consensus-driven demand plan that optimizes the balance between market opportunity and supply network capability.

- **Supply planning:** Support for the translation of demand expectations into supply network requirements that orchestrate reliable, efficient delivery outcomes.

- **End-to-end SCP:** Support for aligning horizontal and vertical planning decisions across the internal enterprise supply chain and into external trading partners.

- **Financial impact analysis and planning:** Support for the ability to handle more and more of an organization's financial decisions within the SCP process, rather than outside it.

2. The vendor had to have an official office, branch or affiliate in at least three of the following eight regions considered for this market: North America, Latin America, Western Europe, Eastern Europe, Middle East and North Africa, Sub-Saharan Africa, Asia/Pacific (comprising Mature Asia/Pacific, Greater China, Emerging Asia/Pacific and Eurasia) and Japan. One of the three offices had to be in North America or Western Europe.

3. The vendor had to rank among the top 20 SCP solution providers according to the market momentum index defined by Gartner for this Magic Quadrant. Data inputs used to calculate relevancy included interest from Gartner clients, customer reviews and key vendor growth metrics.

Honorable Mentions

The following vendors with reasonably capable and, in some cases, strong SCP solutions did not qualify for inclusion in this Magic Quadrant. This does not mean that their solutions might not be viable alternatives for some customers. We limited participation in this Magic Quadrant to vendors that demonstrated current strengths in the market in several dimensions.

- **AIMMS** is a privately held vendor headquartered in the Netherlands. It delivers solutions for strategic and tactical supply chain scenario planning through to optimization modeling and application development, with the aim of overcoming complex supply chain challenges. Use-case areas include network design, S&OP and capacity planning. AIMMS did not meet the inclusion criterion for market momentum.

- **Blue Ridge** is a privately held vendor headquartered in the U.S. Its Blue Ridge Platform is mainly focused on demand planning, sensing and shaping, as well as capacity planning and inventory replenishment. Additionally, Blue Ridge offers price optimization functionality, following its acquisition of Prolific Virtue in 2019. Blue Ridge did not meet the inclusion criterion for market momentum.

- **Board International** is a privately held vendor co-headquartered in Switzerland and the U.S. It provides a business planning, decision support and analytics platform for areas such as SCP, financial planning, sales performance management and workforce performance management.

Board's background is in the field of financial planning and analysis, from where it expanded into S&OP and SCP. Board did not meet the inclusion criterion for market momentum.

- **Flexis** is a privately held vendor headquartered in Germany. It has a background in the automotive industry and is using the resulting knowledge to create innovative supply chain solutions for highly complex discrete manufacturers covering areas such as S&OP, order slotting, order sequencing and transportation planning. Flexis did not meet the inclusion criterion for market momentum.

- **Infor** is a privately held vendor headquartered in the U.S. With a background in ERP, it has a large portfolio of applications, which include capabilities for SCP. It has a focus on complex manufacturing environments in process-manufacturing industry sectors, with an SCP solution that covers a very broad range of requirements. Infor did not meet the inclusion criterion for market momentum.

- **Manhattan Associates** is a publicly held company headquartered in the U.S. It has several solutions in its portfolio beyond SCP, such as warehouse management applications and transportation management applications, Its Manhattan Active Inventory product is mainly focused on demand, inventory, and replenishment planning, including allocation, with a primary focus on finished goods in the retail and distribution-intensive industries. Manhattan Associates did not meet the inclusion criterion for market momentum.

- **One Network Enterprises** is a privately held vendor headquartered in the U.S. Its applications span areas such as SCP and supply chain execution and visibility. Its SCP capabilities cover areas such as demand planning, S&OP, inventory optimization and supply planning through a single data model. One Network Enterprises did not meet the inclusion criterion for market momentum.

- **River Logic** is a U.S.-based, privately held software vendor. It offers a suite of packaged applications on its Digital Planning Twin SaaS platform, including a wide range of optimization solutions covering network design, cost to serve, supply chain and financial planning, and production planning and scheduling. River Logic did not meet the inclusion criterion for market momentum.

- **ToolsGroup** is a privately held software vendor headquartered in the U.S. Its solutions, Service Optimizer 99+ (SO99+) and Inventory Hub Dynamic Data Unification Platform, focus on dynamic demand, inventory and supply planning, and optimization. It uses an extensive number of AI/ML and probabilistic planning techniques to support a greater variety of planning functions and use cases. ToolsGroup did not meet the inclusion criterion for market momentum.

- **Wolters Kluwer** is a publicly listed company based in the Netherlands. Its CCH Tagetik portfolio has a background in corporate performance management, including financial planning and analysis, but the company emphasized its intention to move further into SCP with its acquisition of Vanguard Software in May 2021. Its CCH Tagetik SCP solution is primarily

focused on probabilistic demand planning through supply network planning and S&OP. Wolters Kluwer did not meet the inclusion criterion for market momentum.

Evaluation Criteria

Ability to Execute

Gartner evaluates vendors on their ability to offer and support an SCP solution that enables customers to achieve the goals of their existing and future SCP processes. This evaluation covers:

- Features available in a vendor's portfolio of products that support SCP.

- Methods used by a vendor to help customers deploy, maintain and develop instances.

- Opportunities for a vendor's customers to be educated on, and to use, best practices and emerging practices for end-to-end SCP.

Vendors are also evaluated on how well their efforts to market and communicate their vision for their product resonate with the market. This is reflected in the:

- Number of customers using the current instance of the product.

- Tendency of customers to use a vendor's product to support a single global instance for planning.

- Likelihood that customers will extend their use of a vendor's product as they execute their strategies to move toward higher levels of SCP maturity.

As shown in the table below, the evaluation criteria for product or service, market responsiveness/record, customer experience and operations have high weightings. They represent the primary drivers for vendor selection among the Ability to Execute criteria. Buyers are most interested in product functionality, a vendor's tendency to carry out the vision set out in its roadmap, the level of satisfaction expressed by a vendor's customers, and how the vendor is able to operate effectively and efficiently during and after implementation.

The criteria for overall viability, sales execution/pricing and marketing execution receive medium weightings. These criteria assess the overall health of vendors, their ability to deliver software that will return a fast ROI at an affordable price, and their recognition in the market.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High

Evaluation Criteria ↓	Weighting ↓
Overall Viability	Medium
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (May 2023)

Completeness of Vision

Gartner evaluates a vendor's Completeness of Vision by applying criteria that assess its:

- Ability to understand current market trends.

- Vision for how emerging technologies can help further the goals of SCP.

- Responses to customer needs and competitive forces — as Gartner views them.

Vendors are evaluated on their ability to articulate, to Gartner and to the market, a "statement of direction" for the next two to three years that matches (or surpasses) Gartner's vision for the evolution of the SCP solution market. They should demonstrate understanding of the major technological and architectural shifts that will be required by this market, and be able to communicate a believable roadmap to exploit these and to deliver appropriate solutions.

The criteria for marketing understanding, marketing strategy, offering (product) strategy and innovation receive high weightings. These criteria assess how vendors demonstrate their vision for supporting a company's digital SCP aspirations and how they envision planning will converge with cross-enterprise functions beyond the supply chain and extend into a multienterprise ecosystem. These criteria reveal the main differentiators of vendors in this market.

The criteria for sales strategy, business model, vertical/industry strategy (see Note 1) and geographic strategy receive medium weightings. These criteria strongly indicate vendors' investment and growth strategies, including their vision for supporting customers across industries and geographies.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	*Weighting* ↓
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (May 2023)

Quadrant Descriptions

Leaders

Leaders demonstrate strong vision and execution capabilities for SCP solutions. They have broad, deep and differentiated functionality that addresses a broad range of user requirements. Their coverage of the main categories of planning capability — configure, optimize, respond and

execution visibility (see Note 2) — is good enough, with a good balance across today's categories and/or those planned for the future.

Leaders have a reasonable range of features to support organizations' maturity journeys. Their visions for supporting a Level 5 maturity planning environment align well with Gartner's vision. Leaders anticipate where customer demands and markets are moving, and clearly identify how innovative technologies can be applied to planning applications. They have strategies to support emerging requirements to build future-proof SCP solutions that focus on enabling both high-quality decision making and achieving a high degree of user adoption. Because Leaders are typically well-established in leading-edge, complex user environments, they benefit from user communities that help them remain at the forefront of emerging needs and innovation.

Leaders exhibit strong financial performance and viability with their SCP solutions. Leaders generally have good market penetration, as well as broad functional penetration of their customers. Many customers have deployed a single instance of a Leader's SCP software that supports large planning models and a high degree of supply chain complexity.

Challengers

Challengers exhibit strong execution capabilities at present, but their product roadmaps are not closely aligned with Gartner's view of the future of SCP solutions. They typically have a consistent track record of successful implementations. They provide good support for enabling a Level 3 maturity SCP process, and their software tends to be used as a single global instance for planning. Their product features and technical capabilities are sufficient to support Level 3 maturity planning, but other aspects of their offering are still maturing. Their understanding of SCP market trends and how to apply innovative technologies to SCP is lagging, which may make it challenging for SCP processes to advance to higher levels of maturity. Customers are usually satisfied with Challengers and get reasonable to good value from these vendors' solutions across their supply chains.

Challengers are preferred by buyers that prioritize Ability to Execute over Completeness of Vision. One of these vendors may be favored if its SCP solution is part of an enterprise's incumbent product or if they have some other preexisting relationship. Challengers have demonstrated long-term viability, with sound financial results and stable products. The customer experience they provide is sufficient, with customers having resources available to manage and sustain their instance on their own with little support needed from the vendor.

Prospective buyers should evaluate Challengers based on these vendors' current capabilities and gaps, and determine the extent to which any shortcomings will impede short-term aspirations to higher levels of maturity.

Visionaries

Visionaries articulate a strong vision for their SCP solutions. Their product roadmaps demonstrate a good balance between their understanding of where users' SCP solution requirements are heading and the intended use of key technological developments to help support those requirements.

Visionaries are often thought leaders in one or more key characteristics of SCP technology environments (for example, digital supply chain twin, multienterprise planning and AI), and their management teams prioritize development of advanced SCP capabilities. They have compelling product strategies, but may have current functional gaps in their SCP solution, lack live customers, have less recognition in the market or be in relatively weaker financial positions. They may have developed depth in a specific functional area (such as detailed scheduling or inventory optimization), but not yet have enough depth in other capability areas. Alternatively, they may have developed a highly innovative product whose users are not yet mature enough to derive full value from it.

Niche Players

Although there might be an assumption that vendors in the other quadrants are better choices for new SCP solution buyers, in certain circumstances, a Niche Player can be as good a choice as, or even a better choice than, a Leader, Challenger or Visionary for prospective users. This is because a Niche Player might focus on a specific geography or industry relevant to the customer and therefore have capabilities and offerings tailored to support it.

Niche Players are often seen as specialists — they are frequently used as suppliers of point solutions to support one or two aspects of SCP, such as demand forecasting, inventory planning and S&OP — but may also be used more broadly. Organizations may use a Niche Player's solution in conjunction with SCP solutions from other vendors to fulfill end-to-end SCP needs.

Context

Several years ago, Gartner identified a shift in SCP buyers' behavior. This shift was from investing in best-of-breed solutions for functional SCP activities to evaluating vendors' abilities to support SCP processes holistically by providing integrated end-to-end planning capabilities.

Generally, companies aim to invest in a product that will help them advance to higher levels of SCP maturity and to scale as their planning needs evolve. Some companies still evaluate SCP solutions for specific functional needs, like demand planning or sales and operations planning, with the intention of using a planning tool's additional features over time. In the past, these functional needs may have been fulfilled within a heterogenous SCP application landscape. However, companies found it challenging to support a process that gave them the required visibility across the enterprise and across planning time horizons. Consequently, SCP solutions evolved into a unified data model environment where a single model of the supply chain is used for planning. Hence, buyers have become more inclined to engage with a single vendor that provides an SCP suite that covers most, if not all, of their SCP technology needs.

The trend toward one unified platform continues. However, the focus is again starting to shift in the direction of more flexibility and choice for customers when it comes to planning, so that they are not locked into using only the capabilities of a single technology provider. This shift is prompting vendors to open up their platforms by allowing organizations to develop and embed specific algorithms in them — or to source algorithms from third parties — while also focusing on

governance, flexibility and the user experience. It is still early days in this regard, but this is the direction in which the SCP technology market is moving.

Recommendations

Supply chain technology leaders and SCP leaders looking to invest wisely in SCP technology should:

- Get clarity on their business strategy. What are the key factors to consider for the supply chain?

- Link the business strategy to the supply chain and SCP strategy. What does the SCP capability need to deliver to generate the required business value?

- Identify the current ("as is") maturity level for the relevant SCP processes (for example, S&OP, demand planning and supply planning).

- Define the desired ("to be") maturity level for the relevant SCP processes to support the business strategy. It can be helpful to phase the journey to the to-be state to allow sufficient time to stabilize the planning environment between the phases of the journey.

- Construct an overall SCP technology vision and roadmap with a view to filling any gaps.

- Identify suitable technology options in support of current and future capability requirements. Use this Magic Quadrant and Critical Capabilities for Supply Chain Planning Solutions when considering your options to support the SCP maturity journey. Also ask Gartner analysts to guide you through the selection process.

Market Overview

The SCP market was worth $6.4 billion in 2022 and is forecast by Gartner to exceed $11.4 billion through 2027 — a compound annual growth rate (CAGR) of 12.8% (in constant-currency terms). This market includes a large array of planning solutions, ranging from products that provide foundational planning capabilities through to those that enable business differentiation and innovation.

SCP capabilities grew in importance to many companies in the early stages of the COVID-19 pandemic. Subsequently, the supply chain challenges that spanned the world in 2021 and 2022 underlined the need for comprehensive and restructured supply chain planning processes. This has led companies to prioritize investments in technology solutions that can enable and manage these processes.

The crowded SCP solution market includes everything from large, long-standing technology vendors to smaller, privately funded software vendors. Many of its more established vendors began as specialist providers focused on a few aspects of planning, such as inventory planning, production planning and scheduling, or S&OP. They have since extended their reach into multiple disciplines of SCP through in-house development or acquisitions. New entrants typically come from the worlds of big data and AI, which mainly focus on short-term planning to fill use-case-specific gaps in incumbent SCP solutions and achieve a fast ROI. This is prompting traditional

SCP solution providers to embed more advanced capabilities in their solutions, such as AI/ML, cognitive computing and support for big data.

This Magic Quadrant is a multiregional analysis oriented toward Gartner's clients in North America and Western Europe. The SCP solution vendors featured in this Magic Quadrant are evaluated, among other things, on their ability to sell to multinational organizations based in North America, Western Europe and beyond.

Evidence

Information used to create the inclusion criteria, market definition and vendor evaluations in this Magic Quadrant came from many sources:

- Interactions between Gartner analysts and hundreds of end-user clients during 2021 and 2022 regarding their SCP solution initiatives.

- Interactions with SCP solution vendors during 2021 and 2022.

- Verified customer feedback shared on Gartner's Peer Insights platform in 2021 and 2022.

- Responses by vendors that met the inclusion criteria for this Magic Quadrant to a standard vendor survey with questions on topics such as geographical coverage, industry coverage, strategies and roadmaps.

- Responses by vendors that met the inclusion criteria for this Magic Quadrant to a standard SCP solution RFP, which included more than 500 detailed questions. Each RFP response was weighted based on Gartner's view of its importance to an SCP solution and was compared with a Gartner SCP solution RFP standard.

- Recorded presentations by vendors that met the inclusion criteria for this Magic Quadrant. These contained detailed information on 18 key, predetermined SCP solution areas.

- Recordings of live demonstrations of current offerings by vendors that met the inclusion criteria for this Magic Quadrant. Gartner analysts had, in advance, provided the vendors with four workflow scripts to demonstrate.

- A live question-and-answer session in which vendors that met the inclusion criteria for this Magic Quadrant answered questions about the data they submitted and performed live, on-demand demonstrations.

- Financial data from the S&P Capital IQ platform for the public companies evaluated. For the private companies, financial data was provided by the vendors. Financial data was scored using Gartner's financial model (see Understanding the Methodology Behind Gartner's Financial Statement Scorecard for Public Companies).

Note 1: Vertical/Industry Strategy Criterion

The vertical/industry strategy criterion examines a vendor's strategy to direct resources, skills and offerings to meet the needs of individual vertical markets. Key for SCP solutions is a focus on three industry groups:

- Process manufacturing:

  - Consumer goods

  - Food and beverage

  - Pharmaceuticals

  - Paper and pulp

  - Oil and gas

  - Metals

  - Chemicals

- Discrete manufacturing:

  - Automotive

  - Industrial manufacturing

  - High tech/electronics

  - Aerospace and defense

  - Mining and construction

  - Medical devices

  - Footwear/apparel

  - Consumer durables

- Distribution-intensive:

  - Telco/utilities

  - Aftermarket

  - Retail

  - Retail (excluding grocery)

  - Wholesale/distribution

Note 2: SCP Configure, Optimize, Respond and Execution Visibility (CORE) Model

Gartner recognizes three major categories of planning functionality in relation to about 60 discernible solution types:

1. Some solutions can help to *configure,* or design the supply chain (for example, in terms of an appropriate supply chain segmentation strategy or postponement strategy).

2. Some solutions can *optimize* the supply chain (for example, by helping to create an optimal plan using constrained resources).

3. Some solutions can find out how to *respond* when execution does not happen according to the optimal plan (for example, via customer order prioritization for Class A customers when a supply delivery is compromised). To respond effectively, an SCP solution must also be able to see what is happening in terms of near-real-time execution.

Gartner's CORE model takes its name from those three major categories and from the requirement for execution visibility:

- **C = Configure**: Decide the configuration or design of the supply chain to achieve the company's goals by enabling the supply chain strategy.

- **O = Optimize**: Create optimal demand and supply plans, taking account of any constrained resources.

- **R = Respond**: Create intelligent responses to execution events that keep the short-term plan as close as possible to what is needed to achieve the company's goals.

- **E = Execution Visibility**: Ensure that the planning capability has the right level of visibility into relevant demand- and supply-side execution events.

Traditional planning solutions tend to focus strongly on the "optimize" category. However, over time, a company will need to rebalance its planning capabilities more evenly across all the categories. Therefore, it is important — particularly when thinking about future SCP requirements — to consider this rebalancing in any technology-related roadmaps.

For further information on the CORE model, see Getting Ready for the Digital Future: Strengthen Your Supply Chain Planning CORE.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.