



**ALM | LAW.COM COMPASS**

**PACESETTER RESEARCH**

Previously known as ALM Intelligence Pacesetter Research

# Supply Chain

20**23/24**

**Table of Contents**

Page	Content
3	<a href="#">The Pacesetter Concept</a>
6	<a href="#">Market Overview</a>
7	<ul style="list-style-type: none"> <li>• Introduction</li> </ul>
8	<ul style="list-style-type: none"> <li>• Market Landscape</li> </ul>
9	<ul style="list-style-type: none"> <li>• Stakeholder Access Map</li> </ul>
10	<ul style="list-style-type: none"> <li>• Demand Drivers</li> </ul>
13	<a href="#">Pacesetters: Supply Chain</a>
22	<a href="#">Innovators</a>
23	<ul style="list-style-type: none"> <li>• Market Segments Map</li> </ul>
24	<ul style="list-style-type: none"> <li>• Competitive Landscape</li> </ul>
25	<ul style="list-style-type: none"> <li>• Legal Market</li> </ul>
32	<ul style="list-style-type: none"> <li>• Management Consulting Market</li> </ul>
43	<ul style="list-style-type: none"> <li>• Multiservice Market</li> </ul>
45	<ul style="list-style-type: none"> <li>• Technology Market</li> </ul>
50	<a href="#">Appendix</a>

**Related ALM Research & Tools**

[Analyst Reports](#)

[BenefitsPro.com: COVID-19](#)

[Consulting Magazine](#)

[Credit Union Times: COVID-19](#)

[GlobeSt.com: COVID-19](#)

[Law.com: COVID-19](#)

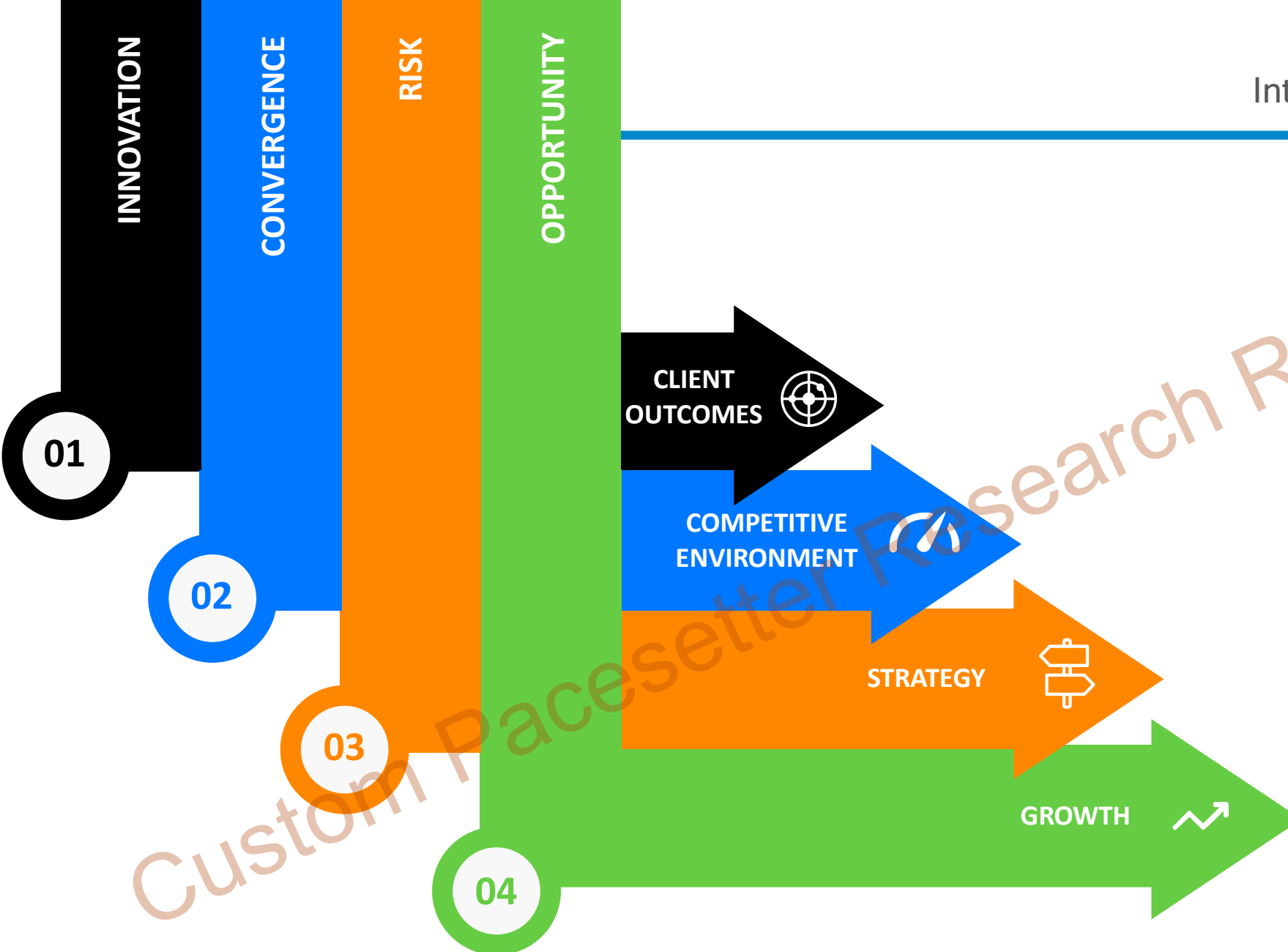
[Law.com: Diversity](#)

[Property & Casualty 360](#)

[Real Estate Forum](#)

[ThinkAdvisor.com: COVID-19](#)

Our readers turn to ALM publications, events, and intelligence to keep at the forefront of their professions.



### What Is Law.com Compass Pacesetter Research About?

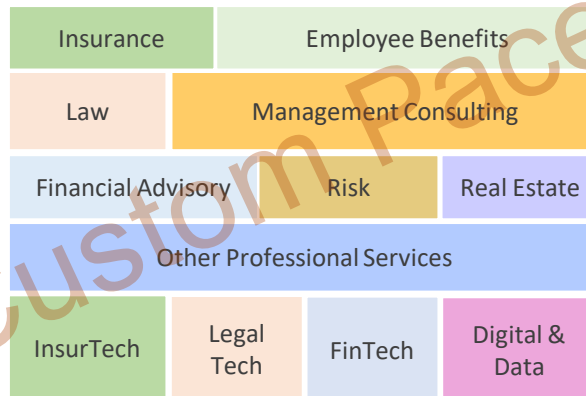
- 1. Innovation:** What professional services providers are doing something different from their peers in a way that moves the needle for their clients?
- 2. Convergence:** How is that innovation changing the competitive landscape?
- 3. Risk:** How does innovation (internal and external) change providers' risk profiles?
- 4. Opportunity:** Is innovation only a threat, or is it also an opportunity?

Law.com Compass Pacesetter Research (previously known as ALM Intelligence Pacesetter Research) is a market research initiative of ALM with an inclusive perspective of the professional services landscape. Rather than traditional market research which focuses on one market segment, APR looks across a broader range that includes law, consulting, insurance, financial advisory, and other actors operating in the market defined by the research topic. We started Pacesetter Research in 2020 to examine how more volatile demand dynamics are forcing market players to reevaluate their approach to **innovation**, **risk**, market **convergence**, and ultimately, **opportunity**. The purpose of Pacesetter Research is twofold:

- Deliver practical insights into the buying and selling of professional services in an increasingly converging marketplace
- Help buyers evaluate their sourcing options with objective assessments of providers' services and capabilities

### Pacesetter Advisory Council (PAC)

Market Leaders are selected by a panel of experts comprised of ALM editors, journalists, market intelligence analysts, and external professionals and academics who have experience working with professional services providers.



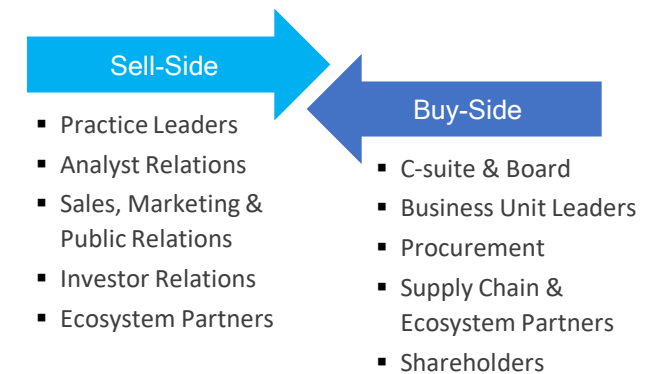
### Research Methodology

APR analysts combine qualitative and quantitative research methods to profile Market Leaders in each market. These providers are evaluated and scored against five core criteria to determine Pacesetter status.

- 1 Business model
- 2 Value proposition
- 3 Service delivery
- 4 Client enablement
- 5 Market Presence

### Audience

APR provides independent and objective analyses to providers and buyers of professional services coupled with practical insights that inform the decision-making process for strategic planning and procurement professionals.







Custom Pacesetter Research Report for EY

# Market Overview

February 2023

What's different about this report on innovation in supply chains this year from last?

On the trend side, the good news is that the client focus has moved from more tactical to strategic as clients have come to recognize the linkage between a well-functioning supply chain and everything else the organization is doing. To that point, most organizations are entering 2023 with significantly better running, more efficient supply chain management regimes than they began 2022 with. The bad news is that with slowing global economic growth and a customer base spooked by geopolitical turmoil, demand in general is slowing.

Part and parcel to the move in client focus from tactical to broader, more strategic projects in supply chain has been the realization that supply chains are an essential part of any value creation story. That may sound obvious but it is a key hurdle many clients have had to overcome in realizing that supply chain management has implications for not just procurement and product delivery, but overall client operational strategy, finance, tax, talent, technology, and market partnership strategies as well. In other words, supply chain is key to the optimal customer experience. To be sure, there are still kinks to work out: close cooperation between finance and operations tends to lag, while most organizations still struggle with effective data management. But the new approaches to supply chain management still foster greater collaboration, connectivity and visibility – what is being called “radical transparency” – across client organizations, even if they're not realizing the full benefits yet.

Another trend that has developed further since last year is the notion of sustainability and resiliency. These two concepts are usually paired together, reflecting a growing linkage between both the need for operational flexibility in supply chains – being able to quickly pivot to respond to global economic and political volatility -- as well as a growing need to more closely align an organization's overall value proposition with the impact it has on the

communities it operates in.

For multiservice and management consulting providers, supply chain-related services (often bifurcated between procurement and supply chain) have moved to the forefront of their offerings and in 2022 played a big role in their revenue generation. These services were often linked to M&A or restructuring services but, increasingly over 2022, themselves became the entry gateway for clients as they sought to address longer-term resiliency challenges. Not surprisingly, technology is playing a big role in supply chain deals with one multiservice provider claiming that more than half of the revenues generated by supply chain-related projects derived from their digital and advanced technologies teams.

Technology providers have benefitted from the growing importance of technology in supply chain solutions with the center of gravity moving from platform-based solutions to outright supply chain-as-a-service solutions. Meanwhile, while the legal profession on the whole remains reactive in supply chain focused on contracts, risk, and compliance, innovators have been developing targeted technology solutions to help legal departments better manage both supply chain technology assets and supplier relationships.

The *Supply Chain 2022-2023* report explores how the most innovative professional services providers in 2023 are able to help clients build effective, efficient and resilient supply chain strategies that “wow!” customers and satisfy key stakeholder concerns.



Tomek Jankowski  
Director, ALM Intelligence Pacesetter Research  
ALM Intelligence  
T: +1.212.457.9175  
Email: tjankowski@alm.com

# The Pacesetters



Custom Pacesetter Research Report for EY



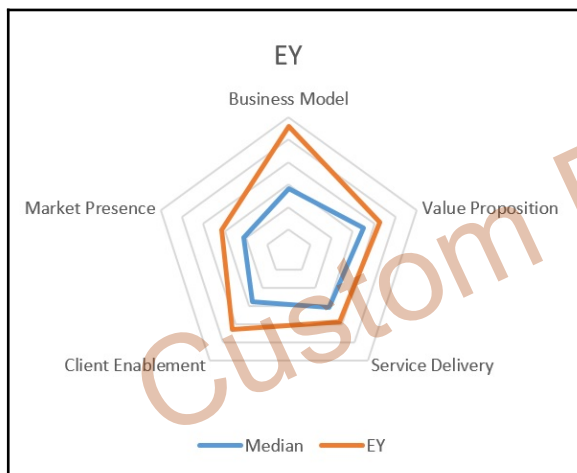
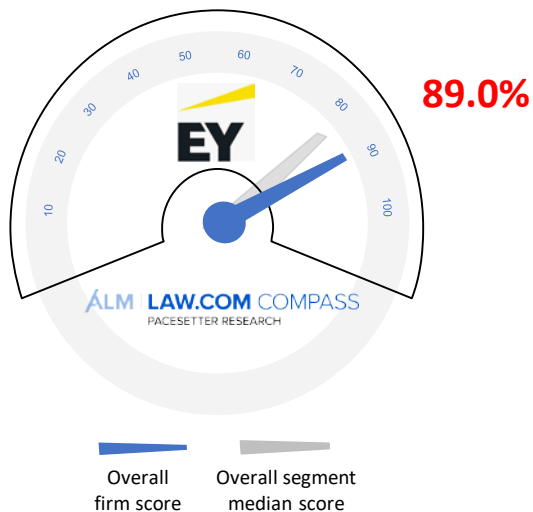
ALM | LAW.COM COMPASS  
PACESETTER RESEARCH  
**PACESETTER**

SUPPLY CHAIN 2023-2024



SUPPLY CHAIN 2023-2024

Overall Score: Supply Chain



“EY’s approach to supply chain goes beyond end-to-end solutions, taking this concept a step further with its “networked value chain,” utilizing technologies such as IoT and blockchain to create connectivity and visibility at every node of an agile supply chain

Profile:

London-based EY has a large SCO practice and is supporting many of the world’s leading companies with complex supply chain transformations across the full range of supply chain topics from Strategic architecture to technology backed planning, procurement, logistics and distribution, and manufacturing transformation. EY has positioned itself for what it sees as the Great Supply Chain “Reset,” and its Supply Chain & Global Trade services has become an important growth leader in EY. In terms of service delivery this practice is organized around Supply Chain & Operations (SC&O), Global Trade & Tax, M&A Strategy & Execution, and Technology. The tax element is gaining in stature in supply chain projects with increasing geopolitical instability. In alignment with its overall strategy focused on business transformation, EY’s approach to supply chain is encompassed within its Supply Chain Reinvention (SCR) framework which covers Supply Chain Intelligence, Strategic Architecture, Operational Excellence, and Sustainability. EY utilizes a growing array of technology assets – more than 50 in-house proprietary tools, at current count, particularly its Supply Chain Intelligence Platform (SCIP). EY has also developed a large ecosystem of alliance partners with which it extends its own technical capabilities, including an innovation hub with Nottingham Spirk for product design and reengineering. EY furthers its capabilities in supply chain through its MxD Digital Operations Hub, and its technology design innovation hubs, EY Wavespace™. This includes a collaboration with Procter & Gamble to help foster digital innovation in supply chains. EY relies on a solution-oriented model that seeks to collaboratively develop a solution with clients focusing on the key elements of a strategic & flexible operating model, supply continuity, surge sourcing support, multi-tier supplier risk mitigation, and rapid cost reduction. The pandemic has sparked particular interest in long-term supply resiliency as clients navigate both potential supply disruptions and a more politicized trade environment. Clients have also been seeking “Controls 2.0” in their supply chains, being able to manage risk in real-time, in process. ESG has also become an important driver in projects. On the procurement side in its Global Procurement Solutions practice, EY covers five basic elements: Procurement Strategy & Operating Model, Category Management & Sourcing Services, Contract & Supplier Management Services, Purchasing & Payment Services, and Procurement IT, Automation & Analytics. For these services, EY utilizes capabilities from across its practice areas for fully integrated solutions. Managed services and outsourcing, including planning-as-a-service for S&OP planning, have also become more prominent in EY’s offering. In 2022, EY acquired UK-based Microsoft Dynamics 365 consulting firm Seaton Partners Limited, whose services also cover Supply Chain Management.

Supply Chain Service Focus

Data, technology tools & solutions	Accounting & auditing
Consulting services	Forensic investigations
Function-focused advisory services	Interim, managed & outsourcing services
Legal services	Stakeholder Management
Risk assurance services	Risk transfer services

- Raw Materials & Sourcing
- Strategy & Design
- Finance
- Governance, Risk & Compliance (GRC)
- Performance & Digitalization
- Product Development & Production
- Distribution & Logistics

■ Services offered  
□ Services not offered



# Appendix

Custom Pacesetter Research Report for EY



*The goal of Pacesetter Research is to help buyers of professional services navigate an increasingly complex landscape with confidence. We use a multidisciplinary perspective to identify best-in-class providers of legal, consulting, financial, insurance, employee benefits, and other professional services, and analyze how they are evolving as an ecosystem of interdisciplinary service providers. Our research is grounded in over 50 years of accumulated market insights and qualitative research models that combine knowledge of management science with case studies and other sources of knowledge to understand patterns of market supply, demand, behavior, and ways of doing business.*

## IDENTIFY

- The Pacesetter Advisory Council (PAC) convenes in advance of the research project kick-off; members include ALM journalists and editors, and external experts such as consultants, general counsel, and industry thought leaders
- The PAC selects the set of Market Leaders that will be covered in the research topic from a larger group of providers that members have identified in the normal course of their work
- PAC members also provide expert knowledge and insights to the Pacesetter Research team throughout the research and analysis process

## RESEARCH

- The Pacesetter Research Team within ALM conducts primary and secondary research
- Primary research includes in-depth interviews with practice leaders at the provider firms covered in the research; satisfaction interviews with clients referred by those providers; and in-depth interviews with thought leaders, recruiting professionals, and other sources
- Secondary research includes data gathered from annual reports and earnings calls, management presentations, public filings, case studies, press releases, journals and publications, online information databases and other publicly available resources




## ANALYZE

- Law.com Compass Pacesetter Research analysts evaluate and score the Market Leaders against five core criteria
  1. Business model
  2. Value proposition
  3. Service delivery
  4. Client impact
  5. Brand eminence

*See criteria definitions on next page*
- Market Leaders that achieve a Pacesetter Impact Score equal to or over 85 are designated as Pacesetters
- Pacesetter analysts map markets and stakeholders and write market trends
- Market segment overviews are peer reviewed by the appropriate PAC member



Impact Scale:

-  Intense impact
-  Very high impact
-  High impact
-  Moderate impact
-  None

The goal of this research was to identify which professional services providers were having the most impact in a rapidly shifting market environment, and measure precisely what that impact was. Each provider, once identified either through the research or by the Pacesetter Advisor Council (PAC), was evaluated in five client impact categories and within each, five sub-categories (See **Page 54** for category details and definitions.), using a 100-point scale for each sub-category. This means that that maximum unweighted score for each category was 500 points, all of which rolled up to a maximum (unweighted) score of 2,500 points. The scoring framework does allow for targeted weighting of subcategories, though no weighting was used for the *Supply Chain 2023-2024* report. In order for a provider to be identified as an Innovator – in other words, to be included in this report – they had to score a minimum overall 70%. To achieve Pacesetter status in this report, they had to score a minimum 85%. The Harvey Balls moon graphics represent the following scores:

- 95%-100%: Intense impact
- 85%-94%: Very High impact
- 70%-84%: High impact
- 55%-69%: Moderate impact
- <55%: None

Score Distribution Analysis

Measurement	Scores
Overall Average	83.9%
Overall Median	83.4%
1 <sup>st</sup> Quartile	81.9%
2 <sup>nd</sup> Quartile	83.4%
3 <sup>rd</sup> Quartile	86.1%
Min	80.1%
Max	89.0%

Custom Pacesetter Research Report for EY

## About ALM

ALM is the most trusted media, information and intelligence company supporting both the practice of and business of professionals in the legal, insurance, commercial real estate and financial services industries. ALM delivers leading data, intelligence, insights, events and audiences essential for growing businesses globally to over 7 million professionals. Please visit [www.alm.com](http://www.alm.com) for more information, and visit [www.alm.com/events/](http://www.alm.com/events/) to learn about our upcoming events. Please follow us on Twitter at [@ALMGlobal\\_](https://twitter.com/ALMGlobal_).

**30+**  
Publications

**65+**  
Events hosted  
globally

**250+**  
Intelligence reports  
developed

**2.65M**  
website visitors per  
month

**2.85M**  
Newsletter  
subscribers

**1.08M**  
Mobile visitors per  
month



**ALM | LAW.COM COMPASS**  
PACESETTER RESEARCH

Custom Pacesetter Research Report for EY