

Magic Quadrant for Supply Chain Planning Solutions

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Supply chain planning technology is needed to facilitate responsive, agile and flexible planning that supports a company's strategic goals. This Magic Quadrant will help supply chain technology leaders evaluate and select the most suitable software vendor to mature their supply chain planning.

Market Definition/Description

Gartner defines supply chain planning (SCP) solutions as platforms that provide technological support to enable a company to manage, link, align, collaborate and share its planning data across an extended supply chain. An SCP solution supports planning, ranging from demand planning through detailed supply-side response planning and from strategic planning through execution-level planning. It is the planning decision repository for a defined end-to-end supply chain. It is also the environment in which end-to-end-integrated supply chain decisions are managed. It establishes a single version of the truth for planning data and decisions, regardless of the underlying execution technology environment.

Organizations use SCP solutions to improve their supply chain planning decisions and reach higher levels of maturity. These solutions enable and streamline planning decision making by providing access to planning data, application of logic such as business rules and priorities and process governance capabilities. If utilized optimally, this results in improved end-to-end supply chain planning processes, including aligning strategic priorities with resource allocations to drive improved business outcomes.

The common use-case scenarios or business problems SCP solutions are intended to address include:

- **Aligning plans end to end** — This involves creating plans that are aligned and feasible across all the different tiers in our supply chains (from suppliers to customers and further tiers out). It is also focused on creating plans that are connected across the different planning layers from strategic-level planning through execution-level planning.
- **Improving visibility** — This involves providing insights into the status of the supply chain as well as into key metrics used for decision making. By having information readily available, organizations are better equipped to assess and provide actionable insights based on data.

Users can identify areas where improvements can be made to increase efficiency and drive value creation for the organization.

- **Fostering decision-making speed and quality** – This involves meeting the need for faster and higher quality decision making for the supply chain operations. By having strong technology support, automation of processes and decisions can be enabled resulting in higher efficiency and less human-biased decision making. Collaboration capabilities allow planners to collaborate directly in the platforms, resulting in greater confidence in the inputs and outputs used to make decisions.

Mandatory Features

The standard capabilities for this market include:

- Demand planning (such as demand forecasting and consensus demand planning)
- Supply planning (such as inventory planning, replenishment planning, order promising, production planning and production scheduling)
- Support for alignment of planning decisions across the enterprise and across multiple planning decision layers
- Support for financial impact analysis and planning

Common Features

The common features for this market include:

- Advanced analytics and AI
- Digital supply chain twin
- Supply chain design, modeling and segmentation
- Continuous planning
- Multienterprise planning

Magic Quadrant

Figure 1: Magic Quadrant for Supply Chain Planning Solutions





Vendor Strengths and Cautions

Adexa

Adexa is a Niche Player in this Magic Quadrant. Its digital SCP solution aims to deliver accurate end-to-end (E2E) plans. Adexa's operations focus on North America, Western Europe and Asia/Pacific (including Japan), where it targets midsize and large enterprises in a range of industries, but with an emphasis on discrete manufacturing. Adexa's overall strategy is to continue the path toward autonomous planning, leveraging its Adexa Genies (intelligent software robots) to support users and refine plans.

Strengths

- **Modeling of constraints:** Adexa has a strong vision for the range of constraints it can model in the solution, which go beyond the traditional supply chain resources and into areas such as environmental, social and governance (ESG). It combines this with a broad range of analytics to create strong, feasible end-to-end plans.
- **Plan granularity and latency:** Adexa's vision includes planning at highly granular levels by using detailed scheduling and strong attribute-based planning capabilities. It extends this with a

strong vision for decision data latency, bringing in real-time data to the platform and leveraging Adexa Genies to run algorithms more autonomously, creating plans readily available to end users.

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

Cautions

- **Digital and AI:** While Adexa has a vision to leverage areas such as deep learning and big data, it lacks a strong vision for utilizing a broader set of techniques such as robotic process automation (RPA), process mining and natural language processing (NLP). This gives customers less choice and opportunity to take advantage of the broader spectrum of these advanced capabilities.
- **Extensibility:** Adexa's vision for extending the platform is limited compared to other vendors evaluated in this Magic Quadrant. Customers and third parties can build their own Genies and can change/configure business rules to affect algorithms; however, the vision lacks broader support to extend the solution with, for example, low-/no-code capabilities and development features within the platform.
- **Third-party implementation services:** Adexa has fewer third-party implementation partners than other vendors in this Magic Quadrant. This impacts customers' choice of partners to support them on their implementation and transformation journeys.

AIMMS

AIMMS is a Niche Player in this Magic Quadrant. Its low-/no-code platform allows it to model and deploy SCP apps across all layers of planning, while network design is offered to the market as a standard off-the-shelf solution called SC Navigator. AIMMS has global coverage, but its operations focus mainly on North America and Europe. It targets midsize and large enterprises in a range of industries, but with an emphasis on process and distribution-intensive industries. AIMMS' investment focus continues to be centered around the further development of its SC Navigator and the custom model, while leveraging emerging technology trends within advanced analytics.

Strengths

- **Range of resource types:** AIMMS' vision for a range of resource types is broad, covering traditional supply chain resources (such as machines, locations, transportation and labor) and extending to finance and ESG resources, such as carbon. The platform allows customers to add new resource types in a flexible way and not only report against them, but also include them into multiobjective optimization models.
- **Plan granularity:** The AIMMS platform is capable of planning at any level of granularity, taking into account elements such as individual resource lines, attributes and lots/batches down to the second level. This is due to its strategy in delivering a flexible low-/no-code environment for custom-made app development, allowing it to include almost any modeling requirement.

- Overall viability: AIMMS is above average on overall viability, primarily driven by a high cloud deployment ratio as well as high employee satisfaction scores.

Cautions

- Vision for sales and operations execution (S&OE): AIMMS' vision for supporting S&OE processes is weaker than that of other vendors evaluated in this Magic Quadrant. Its primary focus is standardized strategic design and tactical planning. More granular planning activities, such as order promising, event management and detailed scheduling, are supported by the platform but need to be custom-built case by case.
- Geographical coverage: AIMMS has a more limited physical presence across regions, and has fewer distributors and value-added resellers globally compared to other vendors in this Magic Quadrant.
- Capability coverage: Despite AIMMS' ability to cover many different use cases across planning, its current native, out-of-the-box functional capabilities are below average compared with its peers. Even with the platform's broad coverage, several areas require major or minor configuration or customization to achieve the desired results.

Anaplan

Anaplan is a Challenger in this Magic Quadrant. Its Connected Planning platform supports demand and supply planning, sales and operations planning (S&OP), and procurement planning, and aligns operational and financial planning to enable extended planning and analysis (xP&A). Its operations are geographically diversified, and it supports enterprises in all industries covered in this Magic Quadrant. Its focus is on enabling real-time supply chain visibility across multienterprise ecosystems, giving customers the ability to model scenarios across their networks with a digital representation of their supply chain.

Strengths

- User experience (UX): The Anaplan Connected Planning platform offers a unified UI with business-owned configurable user screens and graphical layouts. It has robust workflow management that engages users, tracks progress and secures approvals across enterprise planning. In 2024, it plans to expand its analytics with a GenAI co-pilot leveraging large language models (LLMs).
- Extensibility: Anaplan has one of the most extensible solutions on the market due to its open architecture, API strategy and no-code/low-code configuration capabilities. Anaplan continues to expand its offerings with prepackaged functional applications and industry solutions. With PlanIQ and Optimizer, users can access intelligence forecasting and optimization frameworks, and its CloudWorks product can provide connection to external, third-party data sources and services.
- Financial impact analysis: Anaplan is a leader in financial planning. Leveraging these capabilities translates into a top strength for financial impact analysis, critical for planning

processes like IBP. Multiple customers make use of Anaplan for both xP&A and supply chain planning.

Cautions

- Digital supply chain twin (DSCT): Anaplan has a more conservative digital supply chain twin vision compared to other vendors in this Magic Quadrant. Its vision covers elements of the supply chain twin definition (such as visualizations and streaming), but is limited due to its lack of the use of a graph database to support modeling of configuration and correlations.
- Decision support: Anaplan's vision for supporting decision making through policies and thresholds is less mature than other vendors in this Magic Quadrant. Its newly introduced data management system delivers functionalities to enforce business rules, detect anomalies and provide alerts during data conversion into the core platform engines. However, Anaplan lacks a strong vision for creating, maintaining, recommending, and improving policies and thresholds.
- Deployment options: Anaplan offers fewer deployment options than others in this Magic Quadrant. Its solution can currently only be deployed on Anaplan's own cloud, AWS Cloud or the Google Cloud, which may deter organizations that prefer to use other hyperscale clouds or require an on-premises solution.

Arkieva

Arkieva is a Challenger in this Magic Quadrant. Its Arkieva Enterprise platform delivers a broad range of planning capabilities, from S&OP to detailed scheduling. Its operations are focused on North America, Western Europe and Asia/Pacific (excluding Japan), where it targets mainly midsize and large enterprises in process manufacturing, consumer products, retail and telecom/utility industries. Arkieva's investment focus is on updating and expanding its SaaS offering across an E2E spectrum.

Strengths

- Planning decision alignment: Arkieva's vision for aligning planning decisions horizontally and vertically is strong. The ability to support areas such as financial impact analysis, network modeling, E2E scenario analysis and granular levels of plan optimization support this strength.
- Speed and scalability: Arkieva's vision for supporting a scalable SCP solution while maintaining speed is strong. With no technical or commercial limits, it's well-positioned to support its customers' growing data model needs. Utilizing multithreaded (parallel) processors and a continuous planning approach, Arkieva can also take advantage of streaming data in a feasible manner.
- S&OE and execution visibility: The Arkieva Enterprise platform has strong S&OE and execution visibility capabilities, which are supported by machine-driven decisions based on real-time, event-driven updates. Arkieva provides a range of capabilities, from demand sensing and order promising to detailed scheduling, as well as visibility enablement through its supply chain command center.

Cautions

- Decision support: Arkieva's vision for supporting decision making through policies and thresholds is weaker than other vendors in this Magic Quadrant. Arkieva lacks support for creating, maintaining and improving policies that would help users make the right decisions in various situations.
- Industry strategy: Arkieva has a strong focus on process manufacturing industries, such as chemicals, food and beverage, and oil and gas, 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.
- Customer engagement: Arkieva's methods to engage with customers are weaker compared to other vendors in this Magic Quadrant. It has fewer and more infrequent customer conferences, and a weaker customer council consisting mainly of users versus strategic decision makers from its customers.

Blue Ridge

Blue Ridge is a Niche Player in this Magic Quadrant. Its Xpression Planning Platform provides supply chain planning capabilities including S&OP, demand planning and procurement planning. Its operations are mostly in North America and APAC with customers concentrated in distribution-intensive industries, such as retail, wholesale distribution, and industrial and consumer products manufacturing. Its investment strategy has been focused on its new Xpression Planning Platform and expanding its AI/ML use cases for automation for the end user.

Strengths

- Growth strategy: With its sole focus on supply chain planning, Blue Ridge maintains an organic growth strategy and has added a greater-than-average percentage of employees to support customers. This covers business functions such as sales support, product support, consulting and implementation, as well as research and development.
- Viability: Supported by its customers' tendency to use Blue Ridge's platforms as a single global reference for SCP as well as above-average employee satisfaction and solid financials, its viability in the market is above average compared to other vendors in this Magic Quadrant.
- Service cost and pricing: Blue Ridge's strategy to provide low service-to-software ratios as well as below-average overall price levels has allowed Blue Ridge to perform better in this criterion than other vendors in this Magic Quadrant. These are important considerations for midmarket organizations that often operate with more constrained resources and need to do more with less.

Cautions

- User experience: Blue Ridge's vision for user experience is below average compared to other vendors in this Magic Quadrant. While its vision is developing, it lacks current capabilities to take advantage of different techniques, such as natural language, cognitive computing and

generative AI, to enhance the user experience. This limits its ability to provide explainability of planning results.

- **Geographic strategy:** With offices only in North America, Western Europe and APAC, Blue Ridge is below average for its geographic strategy compared to other vendors in this Magic Quadrant. Furthermore, it does not make use of distribution partners or value-added resellers to reach a broader customer potential.
- **Deployment options:** The Blue Ridge solution is mainly deployed on the AWS hyperscale cloud, which limits customer choice for cloud deployments. This may drive some organizations away if they prefer to use other hyperscale clouds or require an on-premises solution.

Blue Yonder

Blue Yonder is a Leader in this Magic Quadrant. Its Luminate Platform provides end-to-end multienterprise planning with a broad set of capabilities. Blue Yonder's operations are geographically diversified, and it provides support to a large number and variety of enterprises across all industries covered in this Magic Quadrant. It acquired flexis AG (a German SCP solution provider) in February 2024 to further strengthen its position in the automotive and industrial manufacturing market. Blue Yonder's R&D investment is toward adding cognitive use cases within all of its SCP capabilities onto a cloud-native, low-code platform following a three-year journey.

Strengths

- **Platform composability:** Blue Yonder's platform vision is based on a comprehensive microservices architecture with the microservices consuming data out of Snowflake. Users will be able to break down a function into independent microservices that can be composed into various workflows. Blue Yonder currently has over 200 SCP microservices available for use, combined with a published API catalog and an API gateway portal.
- **Range of analytics:** Blue Yonder's vision to leverage different analytical techniques such as heuristics, optimization, simulation and machine learning across demand and supply is above average. It also has a compelling vision around the use of GenAI, ranging from contextual support for decision making to AI model improvements and steering intelligent planning agents.
- **Capability coverage:** Blue Yonder has broad and deep capability coverage to support all the different layers of planning. Capabilities range from network design, inventory optimization, demand and promotion planning to order promising and detailed scheduling.

Cautions

- **Digital supply chain twin:** Blue Yonder's vision for the DSCT is more narrow than other vendors in this Magic Quadrant. It is centered around making use of real-world data with direct live access, with Snowflake acting as an enabler for simplified data sharing. However, while its contextualized data-driven model generation is evolving, it isn't carrying much weight in the current vision.

- Customer experience: Blue Yonder received below-average feedback for customer service and support, as well as for the tendency for customers to recommend the solution to others. This results in an overall customer experience that is below average compared to other vendors in this Magic Quadrant.
- Pricing: Blue Yonder has recently taken initiatives to simplify its pricing structure with a pricing model that charges per item location and per user. However, up until now, data shows that Blue Yonder's pricing model is complex and less transparent than other vendors' models. Furthermore, the subscription price for the software is higher compared to other vendors in this Magic Quadrant.

Coupa

Coupa is a Niche Player in this Magic Quadrant. Its Coupa AI-driven platform contains a variety of business applications wherein the supply chain planning apps cover strategic network design and sourcing, supply and demand planning, and inventory optimization. Coupa's operations cover all geographies, and support midsize to large enterprises across many industries. In support of its vision around continuous design, Coupa focuses its investment on decision automation through generative AI, automated scenario creation, and tighter collaboration with procurement and finance, leveraging Coupa's network and infusion of ESG capabilities throughout the platform.

Strengths

- Configure functionality coverage: Coupa excels in the configure layer with a strong vision and focus on network design, optimization and long-term demand planning capabilities. This strength is supported by an ability to optimize and report against a wide range of resource types, such as cash and financials, and ESG resources.
- Customer experience: Coupa is above average on all customer experience subcriteria with positive customer intentions to recommend the solutions to others. This is supported by strong feedback on service and support as well as the overall buy experience. Coupa also performs strongly within customer enablement due to availability of extensive training and certification programs combined with a high number of customers already certified.
- Implementation partners: Coupa is above average on implementation support through third-party consultancy partners with an extensive partner network covering all regions. Its partner network is growing and consists of a large number of trained and certified consultants.

Cautions

- User experience: Coupa has a vision for a consistent UX with embedded visualizations, self-service extraction, transformation and loading (ETL) capabilities, pluggable analytics (bring your own), and an app studio. However, contextual collaboration as well as explainability and transparency around planning results are lagging, and Coupa is still in the process of bringing more capabilities from its desktop app into its native web application.
- Vision for S&OE: Coupa's vision for supporting S&OE processes is weaker than that of other vendors evaluated in this Magic Quadrant. Areas such as event management and order

promising are not supported. Coupa's vision for more granular levels of planning decision making is limited to impacting operational planning policies and constraints rather than providing actual functional coverage.

- **Deployment options:** Coupa's SCP cloud strategy is evolving in a cloud-first direction, but it currently pursues a hybrid approach of platform and desktop integration. Only the desktop version can be deployed in a private cloud (such as on Google, Azure or AWS), and only AWS is fully available to its customers for deployment. Its supplier collaboration application is 100% cloud-based and supports AWS and Microsoft Azure.

Dassault Systèmes

Dassault Systèmes is a Visionary in this Magic Quadrant. Its main product supporting SCP is DELMIA Quintiq, which focuses on integrated planning across resource types, such as people, materials, machines and transportation. Its operations are mostly in North America, Europe and Asia/Pacific, and its clients tend to be midsize or large enterprises in process- and discrete-manufacturing industries. Its investments focus on the integration of product design, industrial engineering of operations and execution of manufacturing operations to include additional factors that can improve business innovation and resilience against disruptions.

Strengths

- **Capability breadth:** Dassault Systèmes has a strong vision for supporting the different layers of planning and extension into design, engineering and execution. This includes capabilities ranging from network design and inventory optimization to order promising, detailed scheduling, workforce, transportation and broad execution visibility.
- **Modeling of constraints:** Dassault Systèmes has experience dealing with complex supply chains, including many different types of constraints, and it can plan with these constraints down to the level of production planning and detailed scheduling. It then uses its broad range of analytics to generate optimized plans across the supply chain.
- **Deployment options:** The Dassault Systèmes SCP solution can be deployed on a variety of hyperscale clouds and can also be an on-premises installation. This gives customers options to choose their preferred deployment option.

Cautions

- **User interface/experience:** Dassault Systèmes' vision for the user experience includes development of a modernized user interface aligned across applications, but it will take some time before this is realized. As complex algorithms are typically used in the platform, it also needs to increase the focus on providing more insights into the automated planning results, making users feel more comfortable accepting the plan proposals.
- **Customer experience:** Dassault Systèmes has a highly structured and broad approach to engaging with customers through, for example, councils and newsletters, but the overall customer experience is below average compared with other vendors in this Magic Quadrant.

- Price level: Dassault Systèmes has a complex pricing model, and the overall price is typically high compared to other vendors.

e2open

e2open is a Visionary in this Magic Quadrant. Its SCP products focus broadly on integrated planning, with support for demand planning and supply network planning. Its operations are mainly in North America, Western Europe and Asia/Pacific, and its customers tend to be large enterprises in process- and discrete-manufacturing industries. e2open's focus is on its Connected Planning initiative, which leverages data from its broad partner network to make higher-quality planning decisions by linking execution and planning closely together.

Strengths

- Modeling of constraints: The provider can model many different types of constraints, going beyond traditional supply chain planning constraints and into areas such as finance, energy and emissions. It then uses different types of planning algorithms, such as heuristics or optimization, to generate feasible plans respecting these constraints.
- Digital and AI: e2open has a strong vision for leveraging various advanced technologies, such as deep learning, process mining and several machine learning techniques. This provides users with broad options to choose the appropriate techniques relevant for their use cases.
- Customer engagement: e2open's strategy for customer engagement includes hosting two user conferences, e2open Connect, which are held annually in both North America and Europe. It also engages with customers through customer advisory boards, newsletters, webinars and whitepapers. The e2open University offers a training and certification program including e-learning and instructor-led training, ensuring that customers have plenty of options to strengthen their skills.

Cautions

- 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 to its peers. The platform offers a solid set of capabilities, but areas such as production scheduling and network design are not covered natively or through partnerships, leaving customers to go elsewhere when such capabilities are needed.
- Extensibility: Currently, e2open prefers its customers to use embedded e2open analytics or to have systems integrator partners or third-party developers build analytics on the platform. Its vision to support self-service analytics is lagging compared with its peers.
- Vendor implementation services: The provider has not grown its implementation services over the past year at the same rate as other vendors in this Magic Quadrant, despite having a good number of new customers on the platform. This can be indicative of a more effective implementation strategy, but it can also be a watchout in terms of vendor resources availability.

GAINSystems

GAINSystems is a Visionary in this Magic Quadrant. Its GAINS solution includes areas such as demand management, inventory optimization, supply planning and network design. Its operations are mostly in North America, Latin America, Europe and Australia. GAINSystems mainly serves industries such as industrial manufacturing, defense, distribution, retail, and spare parts/maintenance, repair and operations. In 2023, GAINSystems commenced a technology modernization effort focused on its architecture, and is set to begin to deliver the platform in early 2024. It also acquired 3 Tenets Optimization (3TO) in 2023, which extends its offering of network design functionality.

Strengths

- **Capability breadth:** GAINSystems has a strong vision for supporting the different layers of planning. This includes capabilities ranging from network design and inventory optimization to production planning and order promising.
- **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 range of choices when generating plans across the supply chain.
- **Customer experience:** GAINSystems' customers express positive experiences with several areas such as customer service and support, and evaluation and contract negotiations. Customers also express above-average likelihood of recommending the solution to others, indicating overall satisfaction with the solution and service.

Cautions

- **User experience:** GAINSystems' vision for user experience is below average compared to its peers. It has commenced a modernization process to unify the user experience across legacy capabilities and acquired capabilities (e.g., from 3TO extending its supply chain design offering); however, as with all new developments, it will take some time for the new user experience to be fully deployed and matured. Furthermore, its vision for providing explainability into planning results is comparatively below average.
- **Customer awareness:** Gartner customers do not often ask about or search for knowledge on GAINSystems. This may be impacted by the type of end-user organizations it targets.
- **Third-party implementation services:** GAINSystems has been growing its own consulting and implementation support positively and is seeking to expand its ecosystem. However, it has comparatively fewer third-party implementation service partners, limiting customers' options in this area.

John Galt Solutions

John Galt Solutions is a Challenger in this Magic Quadrant. Its Atlas Planning Platform delivers a broad range of end-to-end planning capabilities, from strategic network modeling to production planning. Detailed scheduling and network design are provided through partnerships. Its

operations are focused on North America, Western/Eastern Europe and Asia/Pacific, where it mainly targets midsize and large enterprises in process manufacturing, discrete manufacturing and wholesale/distribution. John Galt Solutions' investments focus on increasing decision automation, further expanding data integration methods, and uncovering uncertainty-based options and risk-based decisions.

Strengths

- Vision for decision automation: John Galt Solutions has an above-average vision for decision automation. Its Atlas Expert Systems run closed loop, automatically deriving and adjusting thresholds based on experimentation and probabilistic inputs. Atlas Intelligent Workflows are designed to orchestrate human and machine activities, allowing growth in the level of automation over time.
- Implementation time: Compared to its peers, John Galt Solutions is above average in achieving shorter-than-average implementation times (covering demand, supply and S&OP). To achieve this, it leverages, among other things, a wide variety of templates as well as a standard implementation methodology, blending defined stages and sprints.
- 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

- Composability: John Galt Solutions' vision for composability has evolved in a positive direction but remains weaker compared to other vendors in this Magic Quadrant. A public API portal can be accessed to consult its catalog, but it currently has no API marketplace nor a marketplace for extensions, although indicating future development in this area. Furthermore, its communicated microservices strategy is comparatively less tangible.
- Global reach: John Galt Solutions has a more limited physical presence with offices in fewer regions and fewer distribution partners than other vendors in this Magic Quadrant. However, the company continues to grow its global network across South America, Africa, Middle East, Asia/Pacific, and Australia/New Zealand.
- Implementation partners: John Galt Solutions has fewer third-party implementation partners than other vendors in this Magic Quadrant and fewer of these are certified. It accelerated its phased global partner program across regions in 2023 to accommodate this caution.

Kinaxis

Kinaxis is a Leader in this Magic Quadrant. Its RapidResponse solution delivers concurrent planning across a broad range of SCP capabilities, from S&OP and demand/supply planning to production planning and execution. Kinaxis' operations are mostly 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, automotive and

consumer products. Kinaxis' investment focus is on end-to-end orchestration by connecting planning with execution, automation through AI/ML while enhancing human judgment, and the fusion of analytical approaches.

Strengths

- **Planning automation and alignment:** Kinaxis has a strong vision for supporting its customers' requirements for automating and aligning all layers of planning with execution, as well as extending into multienterprise planning. Decision intelligence and automation is incorporated into many areas across demand and supply, from collaborative workflows generation to automated scenario planning.
- **User experience:** The vision for user experience, based on areas such as a unified user interface, self-service, scenario management and content rich collaboration within the platform, is above average. Kinaxis also leverages several techniques to enhance the user experience and to obtain explainability of planning results.
- **Implementation partners:** Kinaxis is above average with regard to certified third-party implementation partner coverage. Through its partnership investment over the years, it can offer a diverse portfolio of large as well as boutique (smaller) consulting partners with broad global and regional coverage.

Cautions

- **Uncertainty management:** Kinaxis' vision to manage or leverage supply-side uncertainty is below average. Kinaxis' vision focuses on demand-side risks to manage variability and uncertainty and includes partnerships with risk management systems, use of probabilities in multiechelon inventory optimization, and robust scenario and simulation planning. Investments in supply-side uncertainty are being expanded through existing partnerships that leverage similar techniques to enhance mitigation of supplier and part-specific risks in the future.
- **Customer service and support:** Kinaxis' customers indicate below-average satisfaction with its customer service and support. A contributing factor to this may be the limited number of languages its help desk and software support; however, Kinaxis is actively investing in this area.
- **Pricing:** Kinaxis' pricing model is complex (consisting of several factors) compared to other vendors in this Magic Quadrant. Additionally, its price level is above average. Kinaxis is, however, actively working on simplifying the pricing model and making the cost of the platform more attractive for a broader audience.

Logility

Logility is a Leader in this Magic Quadrant. Its SCP capabilities are delivered via its Logility Digital Supply Chain Platform, which supports E2E enterprise and multienterprise planning, including network design, S&OP, demand planning, inventory optimization and production scheduling. Logility supports customers mainly in North America, Western Europe, APAC and, increasingly, Latin America. It targets midsize and large enterprises in a wide range of manufacturing,

distribution and retail industries. Logility is expanding its E2E SCP capabilities and incorporating the capabilities of its recent acquisitions of Starboard Solutions in 2022 and Garvis in 2023.

Strengths

- **Innovation:** Logility has an above-average vision for AI as well as speed and scalability compared to other vendors in this Magic Quadrant, supporting graph technologies, GenAI and other AI/ML techniques. This is coupled with a vision to move toward continuous planning that is supported through distributed processing, multithreading and a cloud-agnostic approach for delivery of its solution.
- **Decision alignment:** Logility's vision for providing planning support across different layers of planning (strategic, tactical, operational) is above average. It 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. Logility has a vision to automate multienterprise planning processes across planning phases and to align processes and decisions through granular reconciliation.
- **Customer experience:** Logility is above average on its engagement, customer service and technical support compared to other vendors in this Magic Quadrant. This is supported with a strong certification program, customer councils and conferences to support its customers on a digital supply chain planning journey.

Cautions

- **Decision support management:** Logility is below average compared to other vendors in this Magic Quadrant in supporting its customers on the improvement and automation of policies, parameter settings and thresholds that guide supply chain planning processes.
- **Global reference for SCP:** Compared to other vendors in this Magic Quadrant, its customers are less likely to utilize Logility's platform at a global scale and to use a broad set of functional capabilities. As Logility continues to expand enterprise accounts in its sales strategy, this is an opportunity to improve.
- **Cloud deployments:** Compared with most other vendors in this Magic Quadrant, Logility has a lower percentage of customers that have deployed its primary SCP solution in the 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 from development of its cloud solution.

o9 Solutions

o9 Solutions is a Visionary in this Magic Quadrant. Its o9 platform is broadly focused on planning capabilities across demand and supply. Its operations are mainly in North America, Western Europe, Eastern Europe and Asia/Pacific, and its clients tend to be large enterprises across various industries. o9 Solutions is continuously expanding the number of industries it covers as well as further developing its concept around solution building blocks, intending to shorten deployment timelines and improve implementation quality.

Strengths

- **Digital supply chain twin:** o9 Solutions' vision for the digital supply chain twin shows strength in all areas including the use of low-latency, granular data and graph database technology. The digital supply chain twin is a core element in generating high-quality end-to-end plans.
- **Extensibility:** The o9 Solutions' platform has been designed to be an open and extensible platform. It can integrate specialized algorithms developed by client data science teams or partners in Python, R, Gurobi and others through an open plug-in architecture. This gives customers more choices when leveraging the platform, as they are not tied to using only the embedded algorithms.
- **Customer engagement and enablement:** o9 Solutions engages with customers in a variety of ways, including user conferences, executive councils, road shows, newsletters and webinars. The o9 Academy offers standardized training with certifications across different user groups, and postimplementation support is enabled by the o9 customer success program. An o9 customer can use these broad options to keep up to date and to engage with other o9 Solutions customers for experience sharing.

Cautions

- **Sales strategy:** o9 Solutions' sales strategy is below average compared to other vendors in this Magic Quadrant. It has not acquired as many net new customers, which may be driven by its focus on selling to large enterprises. Furthermore, the number of internal employees has grown significantly, which is a caution for customers requiring support from experienced, internal o9 Solutions consultants but may prove to be valuable in the longer horizon.
- **Pricing:** o9 Solutions' pricing model is more complex and less transparent compared to its peers. Furthermore, 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 its focus on providing a lower total cost of ownership throughout the deployment life cycle.
- **Customer stickiness:** While o9 Solutions is putting a lot of effort into engaging with its customers, Gartner data shows that the tendency for customers to recommend the solution to others is below average compared with other vendors.

OMP

OMP is a Leader in this Magic Quadrant. Its Unison Planning solution covers nearly all aspects of SCP, from network modeling 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 further on the journey toward autonomous planning while continuously expanding its use of technology alliance solutions such as Nulogy for multienterprise collaboration capabilities.

Strengths

- **Capability breadth:** OMP has a strong vision to support all the layers of planning – short term, midterm and long term. This is combined with a strong vision for enabling execution visibility through a variety of internal and external data sources leveraging its Data Genie capabilities and technology partnerships.
- **Modeling of constraints:** OMP shows significant strength in its vision as well as its execution of modeling many different types of constraints, going beyond traditional supply chain constraints into areas such as sustainability. Combined with a broad range of analytics, it enables the creation of optimized plans across the supply chain.
- **Vendor implementation services:** OMP shows a healthy growth in its implementation services alongside a broad range of certified, third-party implementation partners. This enables broad support to customers through their implementation journeys.

Cautions

- **Industry strategy:** OMP has solid expertise in 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 require considerable experience in several industry verticals.
- **Customer functional penetration:** OMP started as a specialist provider within production planning many years ago, which results in several customers using a narrower range of planning capabilities in the platform. However, Gartner has observed a tendency toward broader deployments over the years as this has become the target customer group for OMP.
- **Price level:** OMP has a simple functionality and per-user pricing model, but the overall price is typically high compared with that of other vendors in this Magic Quadrant.

Oracle

Oracle is a Leader in this Magic Quadrant. The Oracle Fusion Cloud Supply Chain Planning solution covers all levels and layers of planning. Its SCP offering is part of the Oracle Supply Chain & Manufacturing (SCM) suite. Oracle's operations are geographically diverse, and its clients tend to be midsize and large enterprises requiring support for end-to-end supply chain management and manufacturing processes. Oracle is focusing its investments on further expanding capabilities for a wide range of industries, moving toward composability of microservices and leveraging Oracle Cloud Infrastructure (OCI) technologies for a variety of advanced techniques.

Strengths

- **Vision for composability:** Oracle's composable architecture vision is above average. It has extensive microservices for fine-grained planning process integration, a substantial library of technical and functional APIs, and openness for third parties to develop apps and integrate AI algorithms via the Oracle PaaS platform.
- **Planning granularity:** Oracle has a strong vision for planning granularity, enabling its customers to plan at any level of detail, be it aggregate or specific. It covers all granularities of time

(seconds up to years) as well as attributes, order lines, batches, resources and subcustomer levels.

- **Pricing:** The price of Oracle's solution is competitive compared with peer vendors in this Magic Quadrant. Additionally, its pricing model is very simple (based on modules and number of users) making it easy for customers to understand the financial impact of scaling the solution up and down.

Cautions

- **User experience:** Oracle's vision for its next-generation unified user interface is promising but has not reached its full potential. Its unified UX work is leveraging the Oracle development platform that goes across all Oracle apps, but it is still missing a stronger vision in areas such as explainability into planning results.
- **Decision support:** Oracle's vision for managing and automating planning guardrails is narrow compared to other vendors in this Magic Quadrant. Automation and autonomous improvements suggested by the system are limited. Its focus lies primarily on providing the user frameworks to manage rules and (dynamic) thresholds.
- **Deployment options:** Oracle's solution can be deployed in a private or public cloud, but only on OCI, which can be challenging for customers with a preference for other hyperscale clouds. However, Oracle applications can be connected to other hyperscale clouds in hybrid environments.

RELEX Solutions

RELEX Solutions is a Challenger in this Magic Quadrant. Its SCP capabilities are supported through its RELEX Supply Chain & Retail Planning Platform, which supports broad SCP functionality ranging from typical SCP capabilities, such as S&OP, demand planning and manufacturing scheduling, to more retail-specific functionality, such as trade and promotion management. RELEX's operations are mainly in Europe and North America, with support available in Latin America and APAC as well. It focuses primarily on industries such as retail and wholesale, but also has a solid presence in consumer products, and food and beverage. RELEX continues to invest heavily in its SCP solution and acquired Optimity in late-2023 to enhance manufacturing planning and optimization capabilities. At the time of our analysis for this Magic Quadrant, however, RELEX and Optimity were operating as independent entities; thus, only RELEX's capabilities are considered.

Strengths

- **Modeling of constraints:** RELEX's platform provides visibility and optimization to a breadth of constraints, including typical physical ones such as space and throughput, but also nontypical resource constraints such as financial (including cost, revenue and profit) and sustainability ones (such as CO2 emissions).
- **Data management:** RELEX's vision for data management includes using data from internal sources and third-party data providers to enable streaming data uploads for its SCP solution to provide continuous planning in fast-moving customer environments.

- Customer engagement: RELEX is above average in customer engagement. It leverages a variety of channels, such as special interest groups, customer councils, newsletters, webinars and whitepapers, to engage with customers. Furthermore, it offers standardized, online training through the RELEX Skills Academy, upskilling customers both during and after implementation of the solution.

Cautions

- User experience: RELEX's vision for a unified interface and single data model across the RELEX legacy application and the recent acquisitions is solid but currently still in the early stages of execution. Its vision for explainability and cognitive computing helping to build trust with end users and automate planner decisions across the platform could be stronger.
- Uncertainty management: RELEX's vision for handling uncertainty in supply chain planning is weaker than other vendors in this Magic Quadrant. Probabilistic approaches to provide a wider range of planning outcomes focus on more limited use cases. RELEX also is lagging in leveraging external data and risk signals to create a more resilient plan.
- Pricing strategy: 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 less transparent, though 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 areas such as demand planning, inventory optimization, S&OP and supply planning. It is extended with natively integrated solutions for scheduling and real-time order promising. SAP is geographically diverse and targets midsize and large enterprises in all industries. SAP leverages emerging technologies as well as existing technologies from across the SAP portfolio to speed development of relevant planning functionality.

Strengths

- Global strategy: SAP has one of the largest footprints of the vendors in this Magic Quadrant, with a global network comprising many distribution partners, value-added resellers and implementation partners across the eight regions defined in this research. It also serves more industries than any other vendor, which enables it to provide broad support to customers.
- Customer growth: Year-over-year growth in the number of customers subscribing to SAP IBP is above average compared to other vendors in this Magic Quadrant. Data shows that most SAP IBP customers deploy the solution leveraging a broad range of capabilities and across several geographies. With its cloud-native platform, SAP IBP is an attractive option for both large and midmarket enterprises.
- Customer engagement: SAP engages with customers in a variety of ways through conferences, customer councils, webinars and newsletters, among others. It offers standardized training

courses and certifications for customers combined with post implementation support to ensure continuous improvement.

Cautions

- Digital supply chain twin: SAP is evolving its digital supply chain twin in a positive direction, but the current state of the digital twin as well as the overall vision lags behind some of the leading vendors in this Magic Quadrant. Not leveraging graph databases is an example of this.
- Customer stickiness: SAP has increased its efforts in engaging with its customers; however, customer feedback shows that SAP IBP customers are less likely to recommend SAP to peers. They are also less satisfied with the service and support they receive from SAP than are the customers of other vendors in this Magic Quadrant.
- Pricing: SAP's pricing model is very simple, with the only driver being cost of goods per functional module; however, the price level is above average compared to other vendors in this Magic Quadrant.

Slimstock

Slimstock is a Niche Player in this Magic Quadrant. Its Slim4 platform focuses on demand and replenishment planning, inventory management, and supplier collaboration. Slimstock's operations are primarily situated in Western Europe and North America. The majority of its customers are midsize enterprises across all industries covered in this Magic Quadrant but with a strong focus on wholesale/distribution. Among its strategic investment goals, Slimstock is focused on user experience, blending AI and machine learning into its solution, helping to optimize the supply chain.

Strengths

- Sales strategy: Slimstock maintains an organic growth strategy and has continued to add a greater-than-average percentage of SCP customers to its client base over the past year. To achieve and support this growth, it gradually increased the number of employees across all its regional offices and business functions (sales, marketing and consulting).
- Single global reference: Slimstock's customers indicate a high tendency to leverage the solution as a single global reference for SCP, signaling the likelihood of continued investment and functional and/or regional expansion of its solution instances.
- Pricing: Slimstock's pricing model for Slim4 is simple and transparent, being based on activated modules, scope and size of the supply chain. Furthermore, the solution's price level is typically lower compared to 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 on constraint-based planning across different resource types is limited. Use cases focus on material, transportation (containerization) and spare parts planning, with storage, warehousing and waste as the

primary key constraining resources to consider. Labor and work centers are not part of the vision.

- Vision for decision automation: Slimstock pursues automation of all routine operations with the help of monitoring, exceptions alerting and process/workflow guidance leveraging RPA and AI to reduce the amount of simple and repetitive tasks. However, Slimstock's overall vision on decision automation is conservative when it comes to autonomous prescription of key planning actions across demand and supply.
- Implementation partners: Slimstock does not leverage implementation partners for the delivery of its solution. In addition to limiting customers' choice of partners, this affects Slimstock's ability to scale and grow compared to other vendors in this Magic Quadrant. The latter limitation is partly compensated by a higher-than-average growth of employees supporting SCP.

ToolsGroup

ToolsGroup is a Niche Player in this Magic Quadrant. Its SCP capabilities come from its solution, Service Optimizer 99+ (SO99+), which covers S&OP, demand planning, replenishment and inventory planning, transportation planning, and optimization. ToolsGroup supports a broad scope of industries, with the largest portion of its customers in Western Europe followed by North America. Its investment strategy has been on delivering SCP capabilities focused on probabilistic approaches and continuing the strong partnerships with technology providers such as River Logic and Tesisquare.

Strengths

- Managing uncertainty: ToolsGroup has an above-average vision for handling uncertainty in supply chains through partnerships enabling risk monitoring and modeling. With strong support for probabilistic techniques for both demand and supply, it enables its customers to proactively handle uncertainty.
- Data latency: ToolsGroup's vision for handling data latency is supported by the module, Inventory Hub, and its ability to support real-time latency upstream and downstream. It detects events in the supply chain and can reoptimize through probabilistic techniques as well as execute data cleansing to ensure an accurate model is maintained.
- Pricing: ToolsGroup has a simple and transparent pricing model combined with an affordable price level, making it attractive for both midmarket and larger organizations.

Cautions

- User experience: When compared to other vendors in this Magic Quadrant, ToolsGroup's user experience strategy is below average. It expects to leverage AI broadly in the platform, which includes the user experience, but the vision is not tangible on how this will evolve nor is it comparatively as far in the journey. Furthermore, it has a more conservative approach to explainability compared to other vendors in this Magic Quadrant.
- Digital planning and AI: ToolsGroup's vision for digital planning and artificial intelligence is below average compared to other vendors. The vision contains elements such as support for

RPA, deep learning and process mining, but lacks a strong vision for the use of graph databases and big data.

- Customer experience: ToolsGroup performs below average for customer service and support, and for evaluation and contract negotiation. The same is true for customer stickiness, which results in an overall customer experience below the average for 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 this Magic Quadrant because they had sufficient customer interest, as defined by Gartner in its SCP solution customer interest indicator (part of the inclusion criteria):

- AIMMS
- Blue Ridge
- ToolsGroup

Dropped

The following vendors no longer appear in this Magic Quadrant because they did not meet the inclusion criteria for customer interest indicator:

- FuturMaster
- ICRON
- QAD

Inclusion and Exclusion Criteria

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

- All of the following SCP solution capabilities must be commercially available (in general availability) as of 10 November 2023. Eligibility for initial consideration is 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.
- 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.
- The vendor had to rank among the top 20 SCP solution providers for the Customer Interest Indicator (CII) as defined by Gartner for this Magic Quadrant. CII is calculated using a weighted mix of internal and external inputs that reflect Gartner client interest, vendor customer engagement and vendor customer sentiment.

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:

- **Board International** is a privately held vendor co-headquartered in Switzerland and the U.S. It provides a unified Enterprise Planning solution integrating planning, decision support and analytics to support business processes for areas such as SCP, financial planning, sales performance management and workforce performance management. Board expanded into S&OP and SCP after establishing a foundation in the field of financial planning and analysis. Board did not meet the inclusion criterion for CII.
- **FuturMaster** is a privately held vendor headquartered in France. It leverages business expertise and big data technologies to provide solutions focused on generating the optimal forecast to drive optimization throughout the supply chain. Its Bloom platform includes the standard demand and supply functionality, as well as trade promotion management. FuturMaster did not meet the inclusion criterion for CII.
- **ICRON** is a privately held vendor headquartered in the Netherlands. Its focus on decision processes provides a unified data model that accommodates multiple algorithms as needed to address a variety of business cases. Its suite of customer-centric SCP solutions includes all of the standard functional areas such as demand planning, supply planning, production planning and S&OP geared toward supporting decision making. ICRON did not meet the inclusion criterion for CII.

- **Infor** is a privately held vendor headquartered in the U.S. with a background in ERP. It has a large portfolio of solutions that includes a variety of SCP capabilities. Infor's focus on advanced scheduling and control tower functionalities have application across a broad range of industries. Infor did not meet the inclusion criterion for CII.
- **One Network Enterprises** is a privately held vendor headquartered in the U.S. Its SCP-focused applications include standard supply chain functions as well as optimization and supply chain execution and visibility. Its single data model enables local and networkwide decision making based on near-real-time data. One Network Enterprises did not meet the inclusion criterion for CII.
- **QAD** is a privately held vendor headquartered in the U.S. It provides solutions to support E2E operations for functions such as S&OP, demand planning and sensing, production planning, distribution planning, and procurement planning for manufacturers in the automotive, life sciences, industrial, high-tech, food and beverage, and consumer products industries. QAD offers composable, preconfigured solutions to facilitate adoption that include continuous improvement functionality to optimize the user experience over time. QAD did not meet the inclusion criterion for CII.
- **River Logic** is a privately held software vendor headquartered in the U.S. 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. Decision-support analytics and scenario management facilitate decision modeling and collaboration. River Logic did not meet the inclusion criterion for CII.
- **sedApta** is a privately held supply chain software vendor headquartered in Europe. Its sedApta Suite delivers supply chain planning and supply chain execution capabilities ranging from S&OP, S&OE and order promising to manufacturing scheduling and optimization. It also has a strong presence in discrete and process manufacturing environments such as industrial manufacturing, automotive, food and beverage, and consumer products. Its solution is delivered through on-premises and cloud deployments. sedApta did not meet the inclusion criterion for CII.
- **Solvoyo** is a privately held vendor headquartered in the U.S. Its cloud-based platform supports E2E supply chain analytics, planning and optimization solutions. A modular approach allows a solution to be tailored to specific requirements with a focus on cost-to-serve metrics and automated decision processes using AI/ML methods and digital twin technology. Solvoyo did not meet the inclusion criterion for CII.
- **Wolters Kluwer** is a publicly listed company headquartered in the Netherlands. Its CCH Tagetik portfolio has a background in corporate performance management, including financial planning and analysis. Its CCH Tagetik SCP solution is primarily focused on probabilistic demand planning to align financial and E2E supply chain planning with workforce plans and xP&A. Wolters Kluwer did not meet the inclusion criterion for CII.

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.
- Recognition by customers in the market.
- Likelihood that customers will extend their use of a vendor’s product in terms of functionality as well as across geographies 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

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium

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

Source: Gartner (April 2024)

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 and ensure adoption of the software.
- 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 this market will require, and be able to communicate a believable, tangible 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 transform the future planning concepts as well as 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

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
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 (April 2024)

Quadrant Descriptions

Leaders

Leaders demonstrate strong vision and execution capabilities for SCP solutions. They have broad, deep and differentiated functionality that addresses a wide 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 healthy 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 typically 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 often are 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.

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 have strong 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

Generally, companies aim to invest in a SCP solution 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 heterogeneous 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, but we are again experiencing change. The focus from end-user organizations is starting to shift in the direction of more flexibility and choice when it comes to planning, so that they are not locked into using only the capabilities of a single technology provider when these are not strong enough in certain areas. 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 a strong 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 \$7.4 billion in 2023 and is forecast by Gartner to reach \$14.9 billion through 2027, resulting in a compound annual growth rate (CAGR) of 17.6% (in constant-currency terms). This market includes a large array of planning solutions, ranging from products that provide foundational planning capabilities 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, and the market has continued to receive a lot of focus and investment. 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 2022 and 2023 regarding their SCP solution initiatives.
- Interactions with SCP solution vendors during 2022 and 2023.
- Verified customer feedback shared on Gartner's Peer Insights platform in 2022 and 2023.
- 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 functional 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 Execute (CORE) Model

Gartner recognizes three major categories of planning functionality:

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 covering both internal and external data sources.

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.

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