

FROST & SULLIVAN

BEST PRACTICES

AWARDS

FROST & SULLIVAN

2020 BEST PRACTICES AWARD



**2020 EUROPEAN MANUFACTURING OPERATIONS
MANAGEMENT SOFTWARE FOR FOOD AND BEVERAGE
CUSTOMER VALUE LEADERSHIP AWARD**

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Background and Company Performance

Industry Challenges

The manufacturing operations management software (MOMS) market continues to experience steady growth due to needs for operational efficiency, stringent government regulations regarding the quality of products, and rising paperless technology adoption in the manufacturing industry. Specifically, there is an increase of software-based electronic systems to monitor and enforce manufacturing processes while tracking all the data associated with production records. As traditional paper-based record-keeping systems are highly prone to errors, MOMS solutions present a window of opportunity to overcome them while also enabling manufacturers to monitor and process the data around-the-clock to make faster and more rational decisions. At the same time, there are some highly regulated industries such as medical devices, which require rigorous external and internal reporting to adhere to strict government regulations. MOMS solutions enable customers to automate crucial regulatory processes to meet regulatory requirements in such industries.

Notwithstanding the accelerating growth of the MOMS market, there are significant pitfalls that impede market participants from increasing their market share, such as the absence of common software standards used to implement the MOMS platforms restricts a more active MOMS market development. Specifically, lacking interoperability among existing systems significantly increases the complexity and cost of MOMS deployments. Additionally, pricing pressure curbs more active market growth. Today, increased price competition reduces average prices for MOM services, putting severe pricing pressure on service providers.

Customer Impact and Business Impact

Excelling in the MOMS Industry

Founded in 2003 in Roeselare, Belgium, Brighteye provides MOMS solutions that enable customers to improve their manufacturing operations substantially. By leveraging its advanced manufacturing software technology, the company retains an excellent reputation and outpaces its competitors in the MOMS industry. Specifically, Brighteye strengthened its MOMS portfolio, brings its tailored MOMS solutions to customers around the world.

Brighteye expanded its commercial activities beyond Belgium to Spain, France, Poland, Russia and Ukraine. In the next two years, the company plans to expand its geographic base in the food and beverage and discrete computer numerical control (CNC) machining factory segments throughout Europe while tripling its number of certified system integrators. Brighteye enjoys constructive partnerships with various companies within the F&B, pharmaceutical, chemical markets [e.g., Olam Cocoa (Singapore), Unilever (United Kingdom), Udappa (Spain), Warnez (Belgium), Paulig (Finland), Teijin (Japan), Novomet (Russia), beMatrix (Belgium)].

Offering Industry-leading MOMS Platform

At the heart of Brighteye's success is Momentum, a cloud-ready MOMS platform that provides an enterprise-level manufacturing execution system, warehouse management and advanced production scheduling, enabling customers to optimize manufacturing

processes. Momentum is a highly configurable, customizable and multilingual solution, which can be tailored to specific organizations regardless of their size and needs. To this end, Brighteye offers unique modular architecture helping customers acquire and implement specific functional capabilities according to their particular priorities and needs.

Brighteye currently provides 12 application modules, which jointly constitute a comprehensive and fully integrated MOMS solution empowering customers with data, control, execution and insights regarding the manufacturing processes. Specifically, these modules provide increased visibility regarding manufacturing operation performance while also significantly lowering manufacturing lead times and cycle times. Furthermore, the modules ensure automatically increased asset utilization cutting down unplanned downtime and improving production scheduling. Moreover, these modules allow customers to increase their compliance with standard processes and improving management and control of supplies and materials.

A number of case studies across various industries have proven the efficiency and reliability of Brighteye's MOMS platform.¹ For instance, since 2004, Mulder Natural Food, a leading Belgian food company used the MOMs platform to expand its product line and improve its ability to handle smaller customer orders swiftly. Also, the platform enabled to reduce the product loss rates and boost overall profitability. As a result, Mulder Natural Foods successfully introduced over 300 new products over two months and reduced its product average loss rate from 12% to less than 1%.

Also, in 2019, the Brighteye's MOMS solution helped Agristo, a leading Belgian pre-fried french fries manufacturer to centralize all of its production data as it processes a wide variety of products packaged in more than 3,000 consumer units. Namely, it helped Agristo align production planning and quality control with the actual state of production operations at each of its four plants. As a first result, Brighteye's MOMS solution helped Agristo to optimize manufacturing operations and decrease downtime at least by 10 hours per year, saving over 400,000 Euros (on average).

Providing Versatile Customer Support

Brighteye works relentlessly to meet and exceed the needs of its customers. To this end, the company offers a spectrum of services like a DevOps implementation toolbox, on-site training and technical support to help customers utilize its MOMS platform to the fullest potential.

Brighteye's team of technical experts and certified system integrators provide around-the-clock online support in English as well as local languages. The company offers detailed guides and information on its MOMS platform to optimize customers' use-cases.

Also, Brighteye offers in-customized on-site training courses at its head office in Belgium or at a customer's site to help customers learn how to utilize its MOMS platform across versatile applications. During training sessions, the company further familiarizes clients with its capabilities to enable them to use it to maximum potential.

¹<https://brighteye.be/#cases>

Conclusion

The absence of common software standards and pricing pressures pose critical challenges for the manufacturing operations management software market. In spite of economic and technical hurdles that impede many industry participants from increasing market share, Brighteye maintains a top-notch reputation for cutting-edge MOMS platform that enables customers to optimize manufacturing processes.

For its unrivaled expertise, technology insight, and customer-centric approach, Brighteye earns Frost & Sullivan's 2020 Europe Customer Value Leadership Award in the manufacturing operations management software in the food and beverage market.

Significance of Customer Value Leadership

Ultimately, growth in any organization depends on customers purchasing from a company and then making the decision to return time and again. Satisfying customers is the cornerstone of any successful growth strategy. To achieve this, an organization must be best in class in 3 key areas: understanding demand, nurturing the brand, and differentiating from the competition.



Understanding Customer Value Leadership

Customer Value Leadership is defined and measured by 2 macro-level categories: Customer Impact and Business Impact. These two sides work together to make customers feel valued and confident in their products' quality and performance. This dual satisfaction translates into repeat purchases and a lifetime of customer value.

Key Benchmarking Criteria

For the Customer Value Leadership Award, Frost & Sullivan analysts independently evaluated Customer Impact and Business Impact according to the criteria identified below.

Customer Impact

- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Business Impact

- Criterion 1: Financial Performance
- Criterion 2: Customer Acquisition
- Criterion 3: Operational Efficiency
- Criterion 4: Growth Potential
- Criterion 5: Human Capital

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan analysts follow a 10-step process to evaluate award candidates and assess their fit with select best practices criteria. The reputation and integrity of the awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 Monitor, target, and screen	Identify award recipient candidates from around the world	<ul style="list-style-type: none"> • Conduct in-depth industry research • Identify emerging industries • Scan multiple regions 	Pipeline of candidates that potentially meet all best practices criteria
2 Perform 360-degree research	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> • Interview thought leaders and industry practitioners • Assess candidates' fit with best practices criteria • Rank all candidates 	Matrix positioning of all candidates' performance relative to one another
3 Invite thought leadership in best practices	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> • Confirm best practices criteria • Examine eligibility of all candidates • Identify any information gaps 	Detailed profiles of all ranked candidates
4 Initiate research director review	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> • Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles 	Final prioritization of all eligible candidates and companion best practices positioning paper
5 Assemble panel of industry experts	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> • Share findings • Strengthen cases for candidate eligibility • Prioritize candidates 	Refined list of prioritized award candidates
6 Conduct global industry review	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> • Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates 	Final list of eligible award candidates, representing success stories worldwide
7 Perform quality check	Develop official award consideration materials	<ul style="list-style-type: none"> • Perform final performance benchmarking activities • Write nominations • Perform quality review 	High-quality, accurate, and creative presentation of nominees' successes
8 Reconnect with panel of industry experts	Finalize the selection of the best practices award recipient	<ul style="list-style-type: none"> • Review analysis with panel • Build consensus • Select recipient 	Decision on which company performs best against all best practices criteria
9 Communicate recognition	Inform award recipient of award recognition	<ul style="list-style-type: none"> • Announce award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance 	Announcement of award and plan for how recipient can use the award to enhance the brand
10 Take strategic action	Upon licensing, company is able to share award news with stakeholders and customers	<ul style="list-style-type: none"> • Coordinate media outreach • Design a marketing plan • Assess award's role in strategic planning 	Widespread awareness of recipient's award status among investors, media personnel, and employees

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of the research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often companies make important growth decisions based on a narrow understanding of their environment, resulting in errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry participants and for identifying those performing at best-in-class levels.



About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, helps clients accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's growth team with disciplined research and best practices models to drive the generation, evaluation, and implementation of powerful growth strategies. Frost & Sullivan leverages nearly 60 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from 45 offices on 6 continents. To join Frost & Sullivan's Growth Partnership, visit <http://www.frost.com>.