

NEAT EVALUATION FOR INFOSYS:

Operational Transformation Leveraging Agentic AI

Market Segment: Embedding Agentic AI into Managed Services

Introduction

This is a custom report for Infosys BPM (Infosys) presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *Operational Transformation Leveraging Agentic AI* in the *Embedding Agentic AI into Managed Services* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Infosys, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering services that enable business operations transformation by leveraging agentic AI. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall and with specific capability in process ideation, build services, development and use of AI models, agentic CX offerings, and embedding agentic AI into managed services.

Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

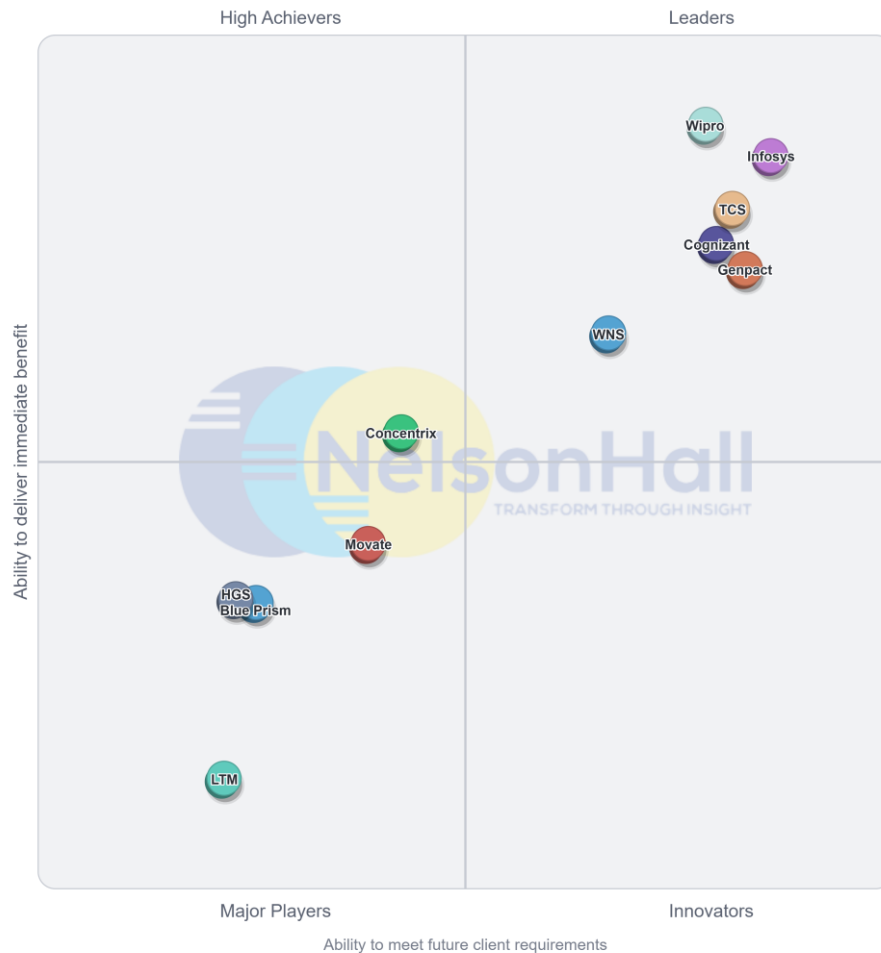
Vendors evaluated for this NEAT are: Blue Prism, Cognizant, Concentrix, Covasant, Genpact, HGS, Hitachi Digital Services, Infosys, LTM, Movate, TCS, Tech Mahindra, Wipro, and WNS (part of Capgemini).

Further explanation of the NEAT methodology is included at the end of the report.

NEAT Evaluation: Embedding Agentic AI into Managed Services

Operational Transformation Leveraging Agentic AI 2026

Embedding Agentic AI into Managed Services



NelsonHall has identified Infosys as a Leader in the *Embedding Agentic AI into Managed Services* market segment, as shown in the NEAT chart. This market segment reflects Infosys' ability to meet future client requirements as well as delivering immediate benefits to its clients with specific capability in embedding agentic AI into managed services.

Leaders are vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet future client requirements.

Buy-side organizations can access the *Operational Transformation Leveraging Agentic AI* NEAT tool [here](#).

Vendor Analysis Summary for Infosys

Overview

Infosys' agentic AI offerings sit within the company's Topaz suite of AI services, solutions, and platforms. The company has been researching the integration of agentic AI and GenAI into its service portfolio, as part of which it has enabled its own internal processes. The first of these GenAI developments, AnswerSmart, a knowledge database assistant, was launched in February 2023, shortly followed by InsightSmart, a data insights and visualization assistant. Infosys has made a number of specialized modules for Answer Smart and Insight Smart focusing on different functions such as F&A, sourcing and procurement, and IT.

Infosys has been investigating which services within the company's portfolio GenAI would best fit and has identified 700 possible GenAI use cases to develop as PoCs. Currently, Infosys has ~60 AI clients, ~140 AI assistants, and ~90 AI agents.

It has developed a number of solutions and components using its AI platform that can be used as part of building agentic, or more automated processes. These solutions and components exist within the Agent Foundry and include:

- *AP on Cloud*: Infosys deployed an AI agent within Infosys' AP on Cloud accounts payable platform for a client. The agent can process invoices in multiple languages, looking up 100+ rules and regulations to be followed as part of the AP process. As of FY25-26, AP on Cloud has processed 4m invoices. Infosys estimates that the GenAI-enabled agent completes the end-to-end processing of 30-40% of invoices without a human in the loop
- *Data Profiling Assistant* is a GenAI-enabled platform supporting data classification, profiling, and enrichment
- *ActSmart* to support the creation of multi-AI agent solutions to orchestrate process workflows
- *Answer Smart* and *Insight Smart* act as text-based and data-based assistants, respectively. Using each of these modules, Infosys has created multiple assistants such as HR, finance and accounting, sourcing and procurement, and IT.

To enable the growth of GenAI-led operations, Infosys has developed training courses and immersion workshops within its internal training platform to train employees on the virtues of AI and its potential uses.

NelsonHall estimates the split of Infosys' AI clients by industry as: financial services 20%, manufacturing 15%, retail 12%, telecoms & media 8%, transportation 8%, energy & utilities 14%, other 23%.

Financials

Infosys does not state its agentic AI-enabled operational transformation revenues. However, NelsonHall estimates that the company's H1 2026 agentic AI operational transformation revenues to be \$15m, of which the split by service types is estimated to be: consulting and assessments 5%, design and implementation 55%, and maintenance and ongoing operations 40%.



Strengths

- Infosys has created a number of solutions to speed up the development of ideas and blueprints for agentic transformation, including Transition Smart; its AI playbook – holding all existing ideas and AI pilots; and its data profiling assistant – to understand the existing data profile of clients
- Smart view on existing automation deployments, with the company not necessarily looking to rip and replace existing transformation efforts, but build on deployments of RPA, for example, when it is delivering results
- Opportunity and program in progress to embed agentic AI across its own platforms, including AP on Cloud, enhancing automation and scalability
- Significant investment in its workforce to train them in AI and for these employees to supply new automation ideas and be measured on usage through gamification
- Strong guardrails with focus not only on technical guardrails, but also legal ones that are customized to the client use case and will reduce the risks associated with non-deterministic automation.

Challenges

- A number of its use cases have been slower to deliver results than other vendors. The internal deployment of AP on Cloud began delivering measurable gains in approximately six months; typically, competitors are aiming to market around efficiency gains within a single quarter following implementations at a higher end
- Currently relies solely on prompt engineering, which may limit customization and effectiveness in more complex use cases.

Strategic Direction

Across all its BPM services, Infosys has stated its ambition to become an AI-first organization.

The company expects contraction across the front, middle, and back office, alongside the emergence of a new AI-augmented operating model that shifts from ‘AI in the loop’ to ‘human in the loop’. Infosys anticipates that work will eventually be split roughly into 20% digital workers using deterministic automation, 20% AI workers operating agentially, 20% operations led by AI agents with humans in the loop, and 40% work that remains human-led. It does not intend to replace deterministic automations that are already effective, recognizing that effort would be better spent extending rather than ripping out and replacing these workflows.

Infosys is also running an internal AI program in which each business unit proposes use cases for the central team to implement. Within this program, it has identified 77 use cases, with 43 at the ideation stage, 11 in the process of implementation, and 23 solutions live in production.

The company has begun implementing agentic AI across its internal functions, with the first deployments in its F&A operations. Its first live deployment is in collections. Not all the transformations in this program are agentic. Some are narrower GenAI deployments, such as an HR use case focused on servicing employee queries by drawing on policy documents relevant to a given role and region.



Infosys says it is taking about six months to prove an AI concept to clients and secure the approvals and legal clearance needed to begin implementation, even when leveraging a pre-built solution such as its AP on Cloud offering.

Outlook

Infosys is embedding agentic AI into its BPS portfolio in its Topaz suite of AI services, solutions, and platforms as it pursues its aim to become an AI-first organization. For this endeavor, the company has invested heavily in training its employees and has worked to gamify the process of employees suggesting further agentic AI use cases.

Infosys is following a three-stage adoption model to help clients identify and implement GenAI use cases. This framework is supported by its ISO 42001-certified enterprise AI platform, which includes a layered architecture to allow independent management of the underlying infrastructure, data connections, and guardrails.

Its recent investments have focused on the identification and building of new agentic AI solutions through the introduction of new technologies, frameworks, and repositories (such as its agent foundry) to hold all the company's AI components that can be readily deployed in new solutions.

Organizations seeking scalable, responsible integration of agentic AI in BPS, particularly in finance, telecom, and order management, should consider Infosys' GenAI and agentic AI-powered services; as should companies that need help understanding the data requirements needed to enable new agentic processes.



Operational Transformation Leveraging Agentic AI

Market Summary

Overview

Automation and machine learning have revolutionized many areas of business process services in recent years. They form the basis for an extensive number of digital interventions used to increase the level of straight-through processing and increasingly provide guidance for judgment-based processes.

Early automation initiatives predominantly focused on automating specific, rule-based tasks within broader business processes. These systems required explicit instructions and were limited in scope, often necessitating human intervention for complex or unforeseen scenarios. The advent of agentic automation marks a significant evolution in this landscape.

By deploying autonomous AI agents capable of making dynamic decisions and adapting in real-time, organizations can now automate entire end-to-end processes with minimal human oversight. These agents can handle complex tasks and adapt to changing conditions, extending automation's reach beyond back-office functions into customer facing roles. The result is enhanced efficiency, reduced costs, and improved customer experience.

Buy-Side Dynamics

Buyers require increased support to implement agentic AI in comparison to RPA due to the increased complexity of the technology and its non-deterministic nature. Rather than setting a fixed process, buyers are required to collate their data, increase its quality, manage integrations, select the most appropriate model to balance speed, cost, and quality, train the models with the data, and put in place guardrails to ensure the models act appropriately.

Due to a talent shortage and the fast-moving nature of the technology, buyers often require vendor involvement in implementing agentic AI into architecturally complex, often broken processes, while ensuring that model costs will not overrun and will deliver ROI.

North America is currently the most mature region for agentic AI adoption, generally owing to the region's willingness to experiment with new operating models. Firms in the EU in comparison are more cautious, in particular when considering the use of data. EU firms have been more likely to have agentic AI pilots stall at the POC stage than American firms. Similarly, firms in the EU generally struggle more against the use of agentic AI to reduce workforce requirements due to stronger employment regulations. As such, investments in the EU have tended to be more human-in-the-loop focused.

Financial services organizations have been one of the earliest adopters of agentic AI because of the sector's strong combination of high process volume, mature data lineage, and existing investment in analytics, automation, and model governance. Agentic AI is being applied to areas such as fraud detection, credit decisioning, customer service, claims handling, financial crime compliance, regulatory reporting, investment research, and model risk management.

Manufacturing is adopting agentic AI in a more operational and engineering-led way. Rather than focusing only on productivity in tasks such as production planning and supply chain coordination, companies are also using image AI in predictive maintenance, quality inspection, and field servicing.



Market Size & Growth

The global agentic AI-enabled operational transformation market is worth \$26bn in 2026 and is forecast to grow at 29% CAGR through 2030.

Success Factors

The key success factors for vendors offering agentic AI-enabled operational transformation services include:

- Robust data engineering and readiness: ability to prepare, structure, and govern enterprise data, especially for use within AI models. This could simply be ensuring that all data is up-to-date, or the data is chunked to be more readable by the AI models
- Strong orchestration capabilities and ability to design agentic processes: expertise in connecting LLMs to other industry platforms and existing RPA deployments
- Model tuning and optimization: skill in selecting, fine-tuning, and scaling LLMs, SLMs, or domain-specific models most suitable for the process, balancing model token cost, possibly through A/B testing, and the ongoing monitoring of new models entering the market
- Partnerships and hardware capabilities to support custom model generation: for clients in sectors such as the public sector which may look to sovereign AI within agentic AI
- AI governance and observability: implementation of guardrails, bias checks, and monitoring for model drift, accuracy, and costs, and supporting organizations in meeting data privacy, encryption, and audit requirements
- Use case discovery and ROI modeling: structured methods to identify and prioritize high-value agentic AI opportunities, understanding how the implementation will impact costs, processing time, and experience
- Change management: programs to reskill teams and drive adoption of AI-assisted workflows and to ease worries from employees and customers on the use of agentic AI
- Scalable delivery and lifecycle management: frameworks for ongoing model updates, maintenance, and performance tracking.

Outlook

- Towards the end of the 2026 to 2030 period, organizations will look towards 'Connected Enterprise' deployments, that aim to leverage the data held across the enterprise to automate processes that span between functions, rather than the somewhat siloed deployments performed currently
- LLM token prices will increase as model owners seek to achieve ROI. As such, it is expected that the usage of smaller, more efficient models (SLMs/ELMs) will increase
- As sovereign AI takes off, it is expected that governments will drive large agentic AI-enabled transformation programs with aims to cut costs across the public sector
- It is expected that more multi-modal AI will be integrated into agentic AI solutions, enabling solutions to analyze and generate images, video, and audio, which will in turn support more use cases in the likes of manufacturing, retail, energy & utility site



inspections, and marketing processes to generate personalized advertisements rather than solely building custom profiles for human workers to build from

- AI will have new regulatory requirements imposed, supporting data privacy and ensuring Responsible AI deployments, requiring greater governance of the data used to train AI and the inputs used for customers; plus, regulations for greater security and those to more strictly monitor for bias, hallucinations, and data lineages
- It is expected that organizations will prioritize the collection and use of data across the enterprise and will focus on the creation of data lakes.



NEAT Methodology for Operational Transformation Leveraging Agentic AI

NelsonHall's (vendor) Evaluation & Assessment Tool (NEAT) is a method by which strategic sourcing managers can evaluate outsourcing vendors and is part of NelsonHall's *Speed-to-Source* initiative. The NEAT tool sits at the front-end of the vendor screening process and consists of a two-axis model: assessing vendors against their 'ability to deliver immediate benefit' to buy-side organizations and their 'ability to meet future client requirements'. The latter axis is a pragmatic assessment of the vendor's ability to take clients on an innovation journey over the lifetime of their next contract.

The 'ability to deliver immediate benefit' assessment is based on the criteria shown in Exhibit 1, typically reflecting the current maturity of the vendor's offerings, delivery capability, benefits achievement on behalf of clients, and customer presence.

The 'ability to meet future client requirements' assessment is based on the criteria shown in Exhibit 2, and provides a measure of the extent to which the supplier is well-positioned to support the customer journey over the life of a contract. This includes criteria such as the level of partnership established with clients, the mechanisms in place to drive innovation, the level of investment in the service, and the financial stability of the vendor.

The vendors covered in NelsonHall NEAT projects are typically the leaders in their fields. However, within this context, the categorization of vendors within NelsonHall NEAT projects is as follows:

- **Leaders:** vendors that exhibit both a high capability relative to their peers to deliver immediate benefit and a high capability relative to their peers to meet client future requirements
- **High Achievers:** vendors that exhibit a high capability relative to their peers to deliver immediate benefit but have scope to enhance their ability to meet client future requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet client future requirements but have scope to enhance their ability to deliver immediate benefit
- **Major Players:** other significant vendors for this service type.

The scoring of the vendors is based on a combination of analyst assessment, principally around measurements of the ability to deliver immediate benefit; and feedback from interviewing of vendor clients, principally in support of measurements of levels of partnership and ability to meet future client requirements.

Note that, to ensure maximum value to buy-side users (typically strategic sourcing managers), vendor participation in NelsonHall NEAT evaluations is free of charge and all key vendors are invited to participate at the outset of the project.



Exhibit 1

'Ability to deliver immediate benefit': Assessment criteria

Assessment Category	Assessment Criteria
Offering	Agentic AI Consulting
	Agentic AI Agents Development and Customization
	Reimagining Processes for Agentic AI
	Change Management When Deploying
	Embedded Agentic AI Into Services
	Data Engineering
	Governance And Security
	Use Of SLMs and ELMs
	Custom AI Model Development
Agentic AI Solutions	CX
	Sales/Marketing
	Insurance
	Healthcare/Life Sciences
	Finance Functions
	HR
	OT/Manufacturing
	Client Zero
	Overall
Benefits Achieved	Cost When Compared to Human Intervention
	Enhanced Customer Experience
	Improved Staff Satisfaction
	Increased Levels of Straight-Through Processing
	Faster Detection of Trends, Patterns, Or Overall Analysis
	Error Reduction
	Cycle Time Reduction
	Improved Personalization and Localization of Services



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Overall Investment in Agentic AI	Delivery Capability Pipeline of Use Cases Change of Pricing Models AI Model Research Data Security Development Research In Non-Text Based AI Implementations Agentic AI Embedded Into Existing Services
Investments in Agentic AI Solutions	CX Sales/Marketing Insurance Healthcare/Life Sciences Finance Functions HR OT/Manufacturing Client Zero Overall Investment Towards the Connected Enterprise

For more information on other NelsonHall NEAT evaluations, please contact the NelsonHall relationship manager listed below.



Sales Inquiries

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:
Darrin Grove at darrin.grove@nelson-hall.com

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