

NEAT EVALUATION FOR INFOSYS:

Supply Chain Transformation

Market Segment: Overall

Introduction

This is a custom report for Infosys presenting the findings of the 2026 NelsonHall NEAT vendor evaluation for *Supply Chain Transformation* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Infosys for supply chain transformation services, and the latest market analysis summary.

This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering supply chain transformation services. 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 consulting and Supply Chain-as-a-Service.

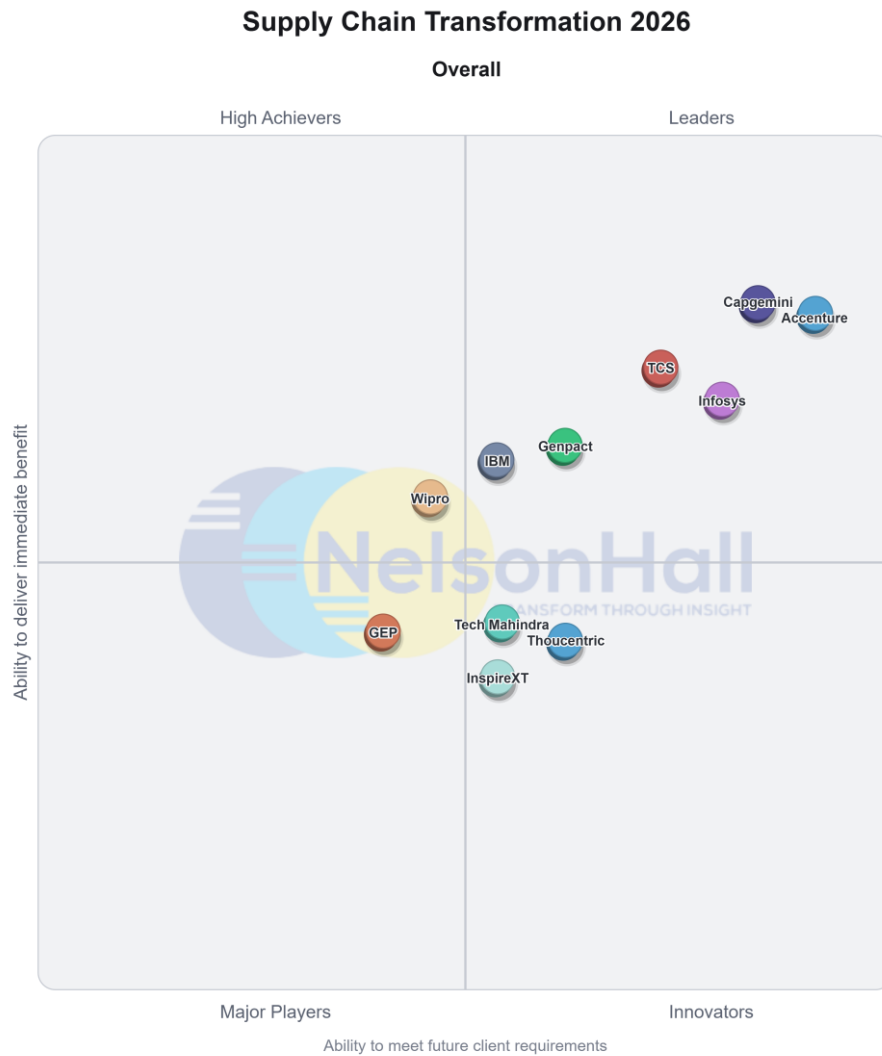
Evaluating vendors on both their 'ability to deliver immediate benefit' and their 'ability to meet client future requirements', vendors are identified in one of four categories: Leaders, High Achievers, Innovators, and Major Players.

Vendors evaluated for this NEAT are: Accenture, Capgemini, Genpact, GEP, IBM, Infosys, TCS, Tech Mahindra, Wipro, and WNS.

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



NEAT Evaluation: Overall



NelsonHall has identified Infosys as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects Infosys’ overall ability to meet future client requirements as well as delivering immediate benefits to its supply chain management clients.

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 *Supply Chain Transformation* NEAT tool (*Overall*) [here](#).



Vendor Analysis Summary for Infosys

Overview

With ~9,600 supply chain FTEs and ~80 global clients, Infosys offers end-to-end supply chain capabilities across consulting, managed services, and technology. Infosys has in the recent past repositioned its supply chain services from a 'live enterprise' to an AI-first offering. These services are integrated as 'One Infosys' and aim to deliver business value such as improved efficiency, effectiveness, and experience. Encompassing AI at scale and enabling supply chains with an AI-enabled control tower, while leveraging partners, is the key focus of the Infosys supply chain offering.

Infosys aims to deliver hyper-productivity, enhanced resilience, and significant revenue growth for its supply chain and broader BPM clients. The levers to deliver these outcomes include blending automation and AI-driven solutions, robust data and analytics, and seamless integration with client and partner platforms. Infosys has an integrated sales, commercials, and supply chain practice which focuses on offerings across the customer value chain and delivering business values.

The company has a strong ecosystem of bolt-on and platform solutions across sales operations, customer operations, revenue operations, planning, fulfilment, and service operations. This ecosystem is enabled through the use of analytics and insights, AI ecosystem for supply chain, and a layer of ERP and platform modernization.

Financials

In CY 2025, Infosys generated revenue of ~\$276m across sales, commercial, and supply chain. Infosys' overall supply chain services revenue grew by 12%, whereas standalone BPS revenue grew by 9% year-on-year.

Strengths

- Wide coverage of supply chain-specific digital accelerators and partners
- Strong suite of offerings with proven use cases and business outcomes
- Wider access to the organization's IT and BPS capability
- Procurement and broad BPS capabilities and offerings that Infosys can complement and leverage to win new clients.

Challenges

- With high reliance on order management, Infosys should consider moving further into the value chain across planning, forecasting, optimization, and after-market services
- Infosys could focus on more outcome-based engagements and move towards more agile engagement and commercial models.



Strategic Direction

Infosys aims to:

- Support clients not only with process execution but also with end-to-end process orchestration across enterprise supply chains. This includes developing control-tower-based visibility and decision-making frameworks that integrate planning, procurement, logistics, and after-market services
- Expand its suite of pre-integrated industry platforms that combine its proprietary IPs, such as Topaz, TradeEdge, and Cobalt, with hyperscaler capabilities. These will be tailored as industry cloud supply chains for manufacturing, life sciences, and consumer industries, delivering modular plug-and-play capabilities such as planning-as-a-service, logistics-as-a-service, and network visibility-as-a-service
- Extend its AI-first strategy by embedding GenAI and agentic AI capabilities across the supply chain. From autonomous order orchestration and cognitive demand sensing to fulfillment workflows, the focus is on intelligent automation
- Continue to strengthen its partner ecosystem by co-developing next-generation capabilities with hyperscalers, logistics providers, and start-ups. Building a complete ecosystem for go-to-market models will allow Infosys to deliver innovation at speed and scale
- Put sustainability as a core dimension of supply chain transformation. Infosys plans to build resilience models that quantify and mitigate risks across geopolitical, environmental, and supplier layers while leveraging a digital twin framework.

Overall, Infosys' supply chain strategy is to move from process optimization to orchestration, enabling clients to operate an intelligent, sustainable, and resilient supply chain.

Outlook

Expect to see Infosys:

- Continue to invest in further strengthening its AI-first use cases, particularly driving use of AI, agents and agentic AI
- Invest in building IPs and leverage the parent organization's capability to develop an ecosystem of digital offerings
- Grow in some of the currently under-penetrated industries and geographies with particular emphasis on upstream supply chain offerings
- Add capabilities to deliver value-added services in areas such as planning-as-a-Service, BPaaS services for small and medium enterprises, and platform-as-a-Service.

Supply Chain Transformation: Market Summary

Overview

With the help of vendors and partner ecosystems, organizations are re-imagining supply chain operations for predictive intelligence, resilience, and real-time responsiveness. As supply chain leaders continue to overcome siloed systems and focus on systems modernization, real-time visibility, and a predictive supply chain, the seamless integration of enabling technologies becomes vital.

Major trends in supply chain transformation include:

- Smarter, agentic AI-based supply chains are becoming mainstream
- IT/OT & IoT convergence is driving smart factories and supply chain networks
- Digital twins and computer vision are shifting supply chains from predictive models to simulation-led, scenario-based decision-making
- Vendors are driving focused solutions, from asset lifecycle management to yard management and anomaly detection.

Major BPS and consulting vendors offer a full span of *plan, source, make, deliver, and after-sales* services across the value chain. *Plan* offerings include sales and operations planning and forecasting, and is one of the high priority area for clients. *Source* covers procurement and contract management. *Make* offerings cover production management and planning, as well as inventory planning. *Deliver* spans order management, warehousing, and transport, and *after-sales* offerings cover returns and warranty management. Order management remains the most outsourced function, but areas such as logistics, inventory control, demand planning, and forecasting services are growing rapidly as outsourced services.

Buy-Side Dynamics

Buyers of supply chain services are increasingly prioritizing:

- Supply chain planning and forecasting, inventory optimization, ERP modernization, and real-time visibility over transactional outsourcing
- Engagements with higher-value, analytics- and transformation-led initiatives over the next 12-24 months

Around 75% of clients view supply chain transformation as highly important, yet client satisfaction remains moderate, with ~67% reporting limited ROI from incumbent vendor partners.

Key unmet needs include faster accelerated time to value, stronger consulting-led transformation, better integration across fragmented legacy systems, improved data quality, and a more focused outcome-based commercial model.



Market Size & Growth

NelsonHall estimates the global supply chain transformation services market to be worth ~\$3.5bn in 2025, growing at 6% CAGR through 2029.

Standalone transformation accounts for ~22% of the global market. Increasing demand for consulting-led transformation, driven by the need for a cost-efficient supply chain amid economic uncertainty, will further accelerate the need for standalone engagements, particularly in planning, IT/OT enabled visibility and transformation, and process automation.

Success Factors

Key success factors in supply chain transformation services include:

- The ability to integrate digital tools and partner ecosystems, with key providers in the supply chain aiming towards AI and AI agents, IoT, digital twins, and control towers across planning, execution, and logistics
- Integrated consulting-led transformation and the ability to blend consulting, transformation strategy, and end-to-end managed services create more value and long-lasting engagements; this is also used as an early engagement opportunity to avoid going through a bidding process
- Industry-specific contextual knowledge in manufacturing/CPG, healthcare, energy and utilities, and regulated industries helps providers address unique compliance requirements
- A transparent engagement model, aligning pricing to business outcomes, cost savings, resilience metrics, and performance indicators, which builds trust with clients
- A strong alliance, along with business use cases, while leveraging partners and building proprietary accelerators, enabling faster deployments and accelerated ROI.

Outlook

The supply chain services market is undergoing a shift from process-intensive areas, such as order management-led outsourcing, to demand sensing, planning, and AI-first supply chain.

While order management remains the largest outsourced area, future growth and demand are expected in areas such as inventory management, logistics, planning, and forecasting, smart warehousing, and digital twin-enabled supply chain simulation.

Future growth will be driven by increasing demand for AI agents, outcome-led delivery models, smart warehousing, IT/OT integration, and sustainability-focused supply chains. This will require vendors to reimagine their offerings and delivery models.



NEAT Methodology: Supply Chain Transformation

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 future client 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 future client requirements
- **Innovators:** vendors that exhibit a high capability relative to their peers to meet future client 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
Offerings	<ul style="list-style-type: none"> Supply chain operating model Supply chain Planning & forecasting Sourcing and procurement offerings Production and manufacturing offerings Logistics and warehousing offerings Order management offerings Warranty and returns management Supply chain AI/ML enabled offerings Analytics offerings Overall SCM offerings
Delivery Capability	<ul style="list-style-type: none"> Depth of SCM Transformation capabilities Scale of Next Gen technology in supply chain services Availability of proprietary tools Application & availability of SCM tools and technology Overall delivery capability
Client Presence	<ul style="list-style-type: none"> Scale of client base: Consulting/Transformation Scale of client base: Managed Services Scale of client base: Sustainability services Number of global/multi-country clients
Benefits Achieved	<ul style="list-style-type: none"> Level of improvement in visibility of the overall supply chain achieved Level of automation in order management achieved Level of improved access to real time data Cost reduction in supply chain management Improved asset utilization Improved planning and forecasting accuracy Improved process visibility and compliance Sustainability roadmap and transformation Increased customer satisfaction or NPS



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Investments	<ul style="list-style-type: none"> Investment in analytics tools and capabilities Investment in Supply chain BPS capabilities Investment in Supply chain transformation/consulting capabilities Investment in latest technology such as AI/ML/GenAI Investment in RPAs and process automations Investment in process mining Investment in sustainability tools and capabilities
Ability to Deliver Innovation	<ul style="list-style-type: none"> Mechanisms in place to deliver client innovation Extent to which client perceives outcome and transformation has been delivered Suitability of vendor to meet future needs of client Innovation in delivery management and engagement commercials
Partners and Technological Advancements	<ul style="list-style-type: none"> Existing partners and technology alliances Agility and investments towards strategic alliances and partnerships Ability to evolve services Perceived commitment to transformation
Market Momentum	<ul style="list-style-type: none"> Client wins in the past 12 months

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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