NEAT EVALUATION FOR CAPGEMINI:

Supply Chain Transformation

Market Segment: Overall

Introduction

This is a custom report for Capgemini 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 Capgemini 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

Supply Chain Transformation 2026
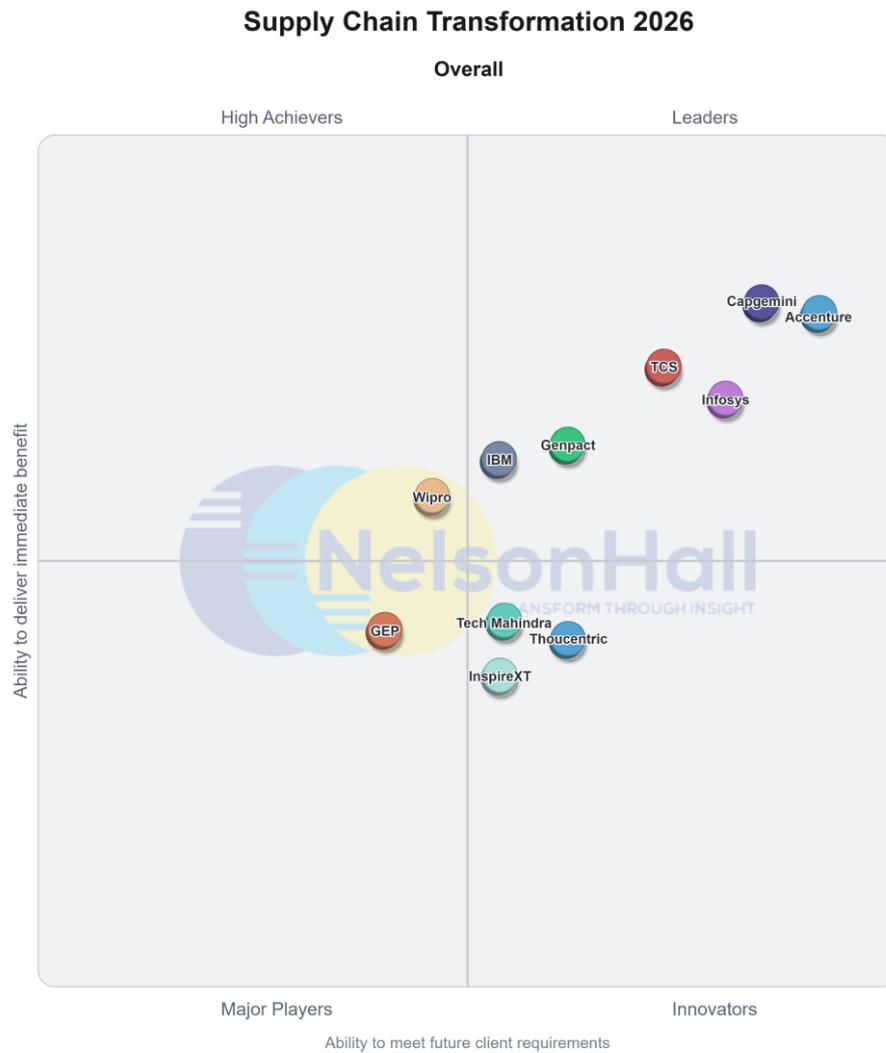
Overall

NelsonHall has identified Capgemini as a Leader in the *Overall* market segment, as shown in the NEAT graph. This market segment reflects Capgemini's 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 Capgemini

Overview

Capgemini positions itself as a specialist in supply chain transformation, focusing on managing traditional-to-intelligent supply chains at scale. Its supply chain management services include consulting, engineering, system integration capabilities, cloud-based supply chain platform offerings, data and AI, and managed services. It positions its supply chain offering as end-to-end, from design to delivery, encompassing services, engineering, cloud, and data capabilities.

In the last couple of years, Capgemini has been strengthening its delivery capabilities and footprints in various geographies, such as in Romania, to strengthen its European language-specific delivery capability, and in Brazil and Guatemala to support its penetration of the North American market.

Capgemini typically works with clients at high levels of maturity in their supply chain functions and continues to work with them throughout their transformation journey across services, platforms, and technology enablement. Capgemini is also looking to build on its existing capabilities and proven domain expertise across the CPG and pharmaceutical industries to drive growth in supply chain areas by using GenAI in logistics and transportation, master data management, and the use of agentic AI.

The company highlights that it has achieved client outcomes including a 10-20% increase in forecast accuracy, ~20-30% reduction in planner's time, >85% touchless planning, 95-97% stock availability, 10-20% reduction in inventory, ~3-5% increase in perfect orders, ~5-7% reduction in logistics cost, >99% data quality, and 30-70% faster speed to market.

Financials

With ~170 supply chain BPS clients, NelsonHall estimates the supply chain BPS has a revenue share of ~$150m in CY 2025.

Strengths

- An integrated supply chain offering that includes consulting, managed services, platform integration, and engineering services, along with an investment in next-gen areas such as smart factory and GenAI/agentic AI

- A large client base across the CPG sector with proven results and use cases

- An ecosystem of technology offerings and frameworks with investments and POCs in some of the latest technology such as GenAI, agentic AI, and smart factory.

Challenges

- With the recent acquisition of WNS, Capgemini should plan a strategic integration of the wider supply chain offering and capabilities

- Ability to seamlessly bundle offerings across consulting, managed services, platform integration, and engineering services to provide clients with a 'one Capgemini' approach.

Strategic Direction

Capgemini's supply chain services remain a core focus area at group level, receiving significant attention and access to investment. It is looking to build on its existing capabilities and proven domain expertise across the CPG and pharmaceutical industries to drive growth in supply chain management using GenAI in logistics and transportation, master data management, and agentic AI. Some of the priority areas for the coming years include:

- Deploying GenAI and agentic AI across the supply chain to drive efficiency and productivity

- Assisting clients with supply chain resilience in areas such as unpredictable cost management, supply instability, logistics bottlenecks, and improving real-time visibility

- Enabling data-driven transformation while leveraging Capgemini's data trust framework

- Growth in supply chain sustainability services: Capgemini expects sustainability services to be a significant growth and focus area.

Other key focus areas include:

- Leveraging engineering capabilities to drive improvements for industrial clients

- Assisting OEMs and manufacturers with complex supply chain engineering solutions

- Work on IT/OT integrated smart factory solutions.

Outlook

Capgemini will continue expanding its supply chain management offerings across platforms and services, emphasizing transformation, touchless operations, ESG, smart factory, and next-gen technology.

Expect to see:

- Further investments in its development and deployment of use cases across GenAI and agentic AI

- Increased emphasis on building its supply chain management ecosystem, including some partnership announcements across services and technology

- Prioritization of consulting-led and business outcome-driven account management with a focus on cross-selling services such as engineering, sustainability, and smart factory.

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	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	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	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	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	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	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	Existing partners and technology alliances
	Agility and investments towards strategic alliances and partnerships
	Ability to evolve services
	Perceived commitment to transformation
Market Momentum	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

research.nelson-hall.com

NelsonHall will be pleased to discuss how we can bring benefit to your organization. You can contact us via the following relationship manager:

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