

NEAT EVALUATION FOR ATOS:

Transforming Business Operations with GenAI

Market Segment: Overall

Introduction

This is a custom report for Atos presenting the findings of the 2025 NelsonHall NEAT vendor evaluation for *Transforming Business Operations with GenAI* in the *Overall* market segment. It contains the NEAT chart of vendor performance, a summary vendor analysis of Atos, and the latest market analysis summary.

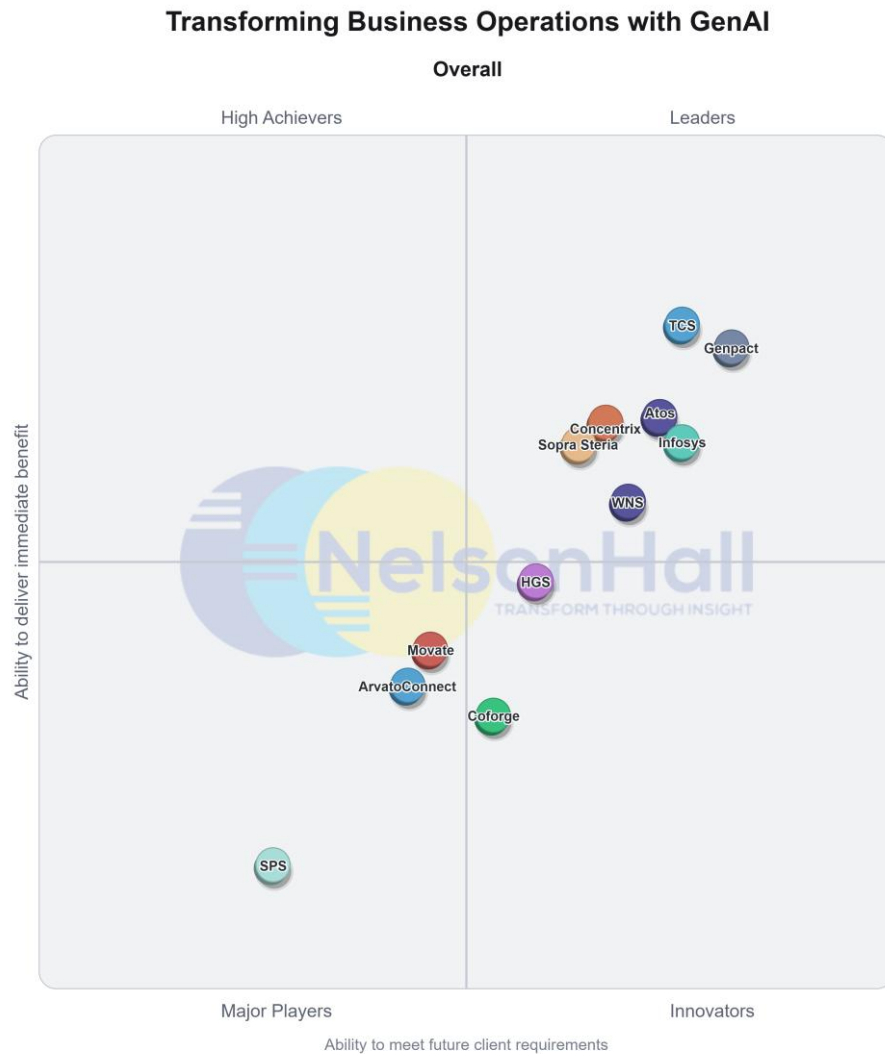
This NelsonHall Vendor Evaluation & Assessment Tool (NEAT) analyzes the performance of vendors offering operational transformation services enabled by GenAI. The NEAT tool allows strategic sourcing managers to assess the capability of vendors across a range of criteria and business situations and identify the best performing vendors overall and with specific capability in understanding GenAI requirements, support for customer interactions, support for BPS service delivery, and developing custom GenAI solutions.

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: ArvatoConnect, Atos, Coforge, Concentrix, Genpact, HGS, Infosys, Movate, Sopra Steria, Swiss Post Solutions, TCS, and WNS.

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

NEAT Evaluation: Overall



NelsonHall has identified Atos as a Leader in the *Overall* market segment, as shown in the NEAT chart. This market segment reflects Atos' overall ability to meet future client requirements as well as delivering immediate benefits to its operations transformation 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 *Transforming Business Operations with GenAI* NEAT tool [here](#).

Vendor Analysis Summary for Atos

Overview

Atos launched its GenAI accelerator program in late 2023, aimed at helping clients deploy GenAI solutions by providing end-to-end consulting, horizontal and vertical solutions, and a modular set of accelerators.

The company's GenAI services are supported with its Atos Polaris AI platform, a cloud-agnostic, LLM-agnostic framework to accelerate the design and implementation of GenAI, autonomous AI agents, and agentic industry solutions.

The Polaris platform supports:

- Software engineering across development, testing, and ITOps through the integration into the client's IDE
- Knowledge management to support the creation and management of RAG solutions
- Agentic AI solutions for business process automation for use within Atos' BPS offerings such as finance, customer services, supply chain, and HR services; plus, an agentic AI industry solutions module offers prepackaged solutions tailored to meet the needs of industry verticals
- The development of custom GenAI solutions using its AI factory, following a design-build-run model, covering a 150-point checklist to assess readiness for transformation, one-day workshops to help identify potential use cases for transformation, leveraging the company's use case navigator. Workshops and pilot development typically take four weeks.

Through the Polaris platform, Atos supports more than 100 GenAI models, including OpenAI GPT, Gemini, Titan, Claude, Llama, and Mistral.

For custom model development, Atos offers its BullSequana AI 1200H for training, and other BullSequana hardware lines for fine-tuning and inferencing.

Following the implementation of GenAI and agentic AI solutions, Atos provides managed security services focused on the prevention, detection, and response to cyber incidents related to GenAI and agentic AI applications. These services are supported by Atos' 17 Security Operations Centers (SOCs) and approximately 6.5k security FTEs.

Financials

Atos does not state its GenAI-enabled operational transformation revenues. However, NelsonHall estimates that the company's H1 2025 GenAI operational transformation revenues are €150m, derived from design and implementation services (50%), consulting and assessment services (40%), and maintenance and ongoing operations (10%).

NelsonHall estimates Atos' revenue split by region to be: EMEA (70%), North America (30%).

Strengths

- Strong domain expertise in developing industry-focused GenAI solutions
- One of the few vendors actively delivering image generation capabilities in production for clients
- Ability to host solutions on-premise or in hybrid cloud environments, leveraging its BullSequana server range for model training and inferencing at the edge or in data centers
- Clear workforce enablement strategy, with ambitions to ensure 100% of its workforce is GenAI-aware by the end of 2025.

Challenges

- Facing competition from vendors with deep specialization in specific domains, such as contact center providers offering advanced GenAI-based customer experience platforms
- Limited demonstration integrating GenAI into complex agentic workflows in live client environments
- A need for clearer proof of the benefits of GenAI-enabled solutions achieved by clients in comparison to the benefits quoted by competing vendors.

Strategic Direction

To win more GenAI and agentic AI -enabled operational transformation deals, Atos is focusing on the following areas:

- Transformation deals – targeting large-scale transformation contracts that aim to deliver business value through the implementation of Atos’ industry solutions
- Business and technology consulting – using its consulting services to identify opportunities for GenAI and agentic AI adoption within client organizations
- Partner-led sales – collaborating with product vendors such as Azure, AWS, GCP, SAP, Salesforce, ServiceNow, Databricks, Snowflake, ESRI to co-create solutions and build joint go-to-market offerings
- IP-led differentiation – embedding Atos’ prebuilt GenAI and agentic AI solutions into client environments. In 2024, IP-led deals resulted in approximately 25 new contract wins and were also incorporated into medium and large-scale renewals.

Atos is prioritizing the following areas for GenAI and agentic AI technology development:

- Enhancing document AI capabilities to support multimodal interpretation, including the extraction of insights from audio and video sources
- Developing and fine-tuning smaller language models trained on customer-specific data, along with implementing industry-specific LLMs
- Continuing to build verticalized GenAI and agentic AI solutions designed for reusability across clients within the same industry
- Creating GenAI-based language translation tools to enable real-time multilingual communication.



Based on client surveys, Atos has identified that one of the main challenges in moving GenAI and agentic AI solutions from pilot to production is performance not meeting expectations. In response, Atos has increased its investment in refining use case positioning and ROI modeling. This aims to ensure that solutions target the most relevant opportunities and provide more accurate expectations of value delivery.

Outlook

Atos is embedding GenAI across its service portfolio through a structured accelerator program, launched in late 2023, with the goal of scaling GenAI adoption across industries. The program includes pre-built horizontal and vertical solutions, developer tools, performance infrastructure, and security and compliance accelerators. Atos has developed over 800 GenAI use cases, with particular focus on finance, manufacturing, healthcare (research and revenue cycle), and the public sector in North America, with 180 client use cases.

Atos' GenAI and agentic AI services are supported through the company's Polaris platform, which has modules to support software development and testing, knowledge management, the company's BPS offerings, and industry solutions, and the creation of custom GenAI and agentic solutions. In support of developing new solutions, Atos offers a 150-point checklist to assess client readiness and single-day workshops. Ideas generated from these workshops are deployed using a 10-step provisioning process over ~4 weeks.

Organizations looking for a partner with deep industry experience, a structured GenAI enablement framework, and the ability to deploy solutions in cloud, hybrid, or on-premises environments may consider Atos for GenAI-enabled digital transformation initiatives.



Transforming Business Operations with GenAI

Market Summary

Overview

While automation and machine learning have already been incorporated in extensive numbers of digital use cases, these technologies are now being complemented by and combined with generative AI (GenAI).

GenAI does not necessarily replace narrow AI and ML solutions or RPA technology, as certain functions continue to benefit from specialized, task-specific models or workflows; these models often deliver greater precision and reliability for a lower cost base in comparison to more general reasoning technology.

GenAI is still a relatively new area, with clients unsure about the true capabilities of the technology, vendors still in the process of integrating these technologies into platforms, and regulatory authorities trying to keep up with developments.

Deployments have been led by customer service engagements, in use cases that aim to expand on previous automation efforts, with early deployments in areas such as payroll and recruitment workflows. These processes have tended to have strong existing data pipelines or knowledge databases that the AI can leverage.

In more advanced use cases, vendors are creating agentic processes, reducing the need for human operators by up to 95% by minimizing the need for L1 employees. Organizations have been upskilling their employees as they shift to GenAI-enabled operations; for example, allowing human agents who previously handled just two conversations in customer service engagements to supervise ten conversations at once.

North America is currently the most advanced region for GenAI adoption, albeit still fairly nascent. Organizations in the region have been first to develop proofs of concept and therefore have moved to enterprise-wide deployments, particularly across customer experience, finance, and HR operations. Regulation remains relatively light: there is no federal AI law, and governance is driven largely by sector-specific regulators, a handful of state regulations such as Colorado's AI Act (CAIA)/California's Transparency in Frontier AI Act (TFAIA), and voluntary corporate frameworks. This will change in the future, however, as shown by the 2025 AI Action Plan, though these regulations at the federal level will likely be less cautious than the EU AI Act.

Financial services are among the earliest and most aggressive adopters of GenAI for operational transformation. Banks, insurers, and investment firms have been faster to integrate generative models into customer service, document processing, compliance, and fraud monitoring, in part thanks to the industry's maturity with data readiness.

Buy-Side Dynamics

GenAI is still a relatively new area, with clients unsure about the true capabilities of the technology, vendors still in the process of integrating these technologies into platforms, and regulatory authorities trying to keep up with developments.

Similar to the adoption of the RPA over the last decade, buyers have been seeking to integrate GenAI capabilities into processes to reduce costs and cycle times of processes. However, more



than RPA, GenAI is enabling organizations to gain a better understanding of clients by summarizing large data sets and enabling better personalization of data.

Market Size & Growth

The global GenAI-enabled operational transformation market is worth \$23.5bn in 2025, and is forecast to grow at an average CAGR of 30% to reach \$70bn in 2029.

Success Factors

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

- *Robust data engineering and readiness*: ability to prepare, structure, and govern enterprise data, especially for use within GenAI models. This could simply be ensuring that all data is up-to-date
- *Strong orchestration capabilities and the ability to design agentic processes*: expertise in connecting GenAI to ERP, CRM, RPA, and other enterprise systems
- *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
- *AI governance and observability*: implementation of guardrails, bias checks, and monitoring for model drift and accuracy, 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 GenAI 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
- *Scalable delivery and lifecycle management*: frameworks for ongoing model updates, maintenance, and performance tracking.

Outlook

The future of the GenAI-enabled operational transformation market will lean heavily into GenAI integrated into agentic automation; i.e., using RPA, APIs, GenAI, and human operators. These agentic processes will be orchestrated through CRM platforms such as ServiceNow, automation platforms such as UiPath, and ERP platforms such as Workday, which are currently converging on shared capabilities.

Rather than integrations into individual tasks, GenAI, as part of agentic automation, will support more end-to-end automation of process chains.

LLM token prices will increase as model owners seek to achieve ROI. As such, it is expected that the usage of smaller models (SLMs) and industry-specific models will increase.

The use of models to understand and generate images and videos will grow dramatically within marketing processes to generate personalized advertisements and support content moderation.



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 or data fabrics.

It is also expected that countries will develop more regulations on the security requirements and governance standards for GenAI models to ensure that organizations monitor for bias, hallucinations, and data lineage.



NEAT Methodology for Transforming Business Operations with GenAI

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	Overall GenAI-Enabled Operational Transformational Capabilities
	Consulting Capabilities to Identify Opportunities for GenAI
	Capability to Design GenAI Solutions
	Ongoing Management of GenAI Operations
	Data Readiness Support
	GenAI Change Management Capability
	Understanding and Use of GenAI Models
	GenAI capabilities for Audio/Image/Video Use Cases
	Cybersecurity Capabilities for GenAI
	GenAI Guardrails and Support for Bias and Hallucination Reduction
	Prompt Engineering Capabilities
	Solution Delivery Capability
	GenAI in Support of BPS
GenAI-Enabled Solution Development	RAG Knowledge Database Capabilities
	Document Extraction, Classification, and Summarization Capabilities
	GenAI use in Agentic Automation
	GenAI-Enabled HR Capabilities
	GenAI-Enabled IT Assistant Capabilities
	GenAI-Enabled Marketing Capabilities
	GenAI-Enabled CX Services Capabilities
	GenAI-Enabled Due Diligence Capabilities
	GenAI-Enabled Software Development Capabilities
Client Presence	GenAI-Enabled F&A Capabilities
	GenAI-Enabled Data Analytics Capabilities
	Overall GenAI-Enabled Operational Transformation Presence
	North America Presence in GenAI-Enabled Operational Transformation
	EMEA Presence in GenAI-Enabled Operational Transformation
	APAC Presence in GenAI-Enabled Operational Transformation
	GenAI-Enabled Operational Transformation Support for BFSI Clients
	GenAI-Enabled Operational Transformation Support for Manufacturing Clients
	GenAI-Enabled Operational Transformation Support for Retail Clients
	GenAI-Enabled Operational Transformation Support for Telecoms and Media Clients

Continued...



	GenAI-Enabled Operational Transformation Support for Transportation Clients GenAI-Enabled Operational Transformation Support for E&U Clients GenAI-Enabled Operational Transformation Support for Other Industries
Benefits Achieved	Overall Benefits Received Monetary ROI Decreased Staff Onboarding Time Increasing Customer Experience Improved Staff Satisfaction Increasing Levels Of Straight-Through Processing Enabling Deeper Analysis And Faster Detection Of Trends Reducing Errors In Service Reducing Cycle Time Resulting In Improved Personalization And Localization Of Services Innovation & Creativity



Exhibit 2

‘Ability to meet client future requirements’: Assessment criteria

Assessment Category	Assessment Criteria
Level of Investments	Delivery Capability
	Pipeline Of Use Cases
	Sales Enablement
	GenAI Model Research
	Data Security Development
	GenAI-Enabled Transformation of BPM Offerings
Process & Sector Emphasis	Research in Non-Text Based GenAI Implementations
	Agentic Automation Use Case Development
	Development of GenAI for HR Assistant Solutions
	Development of GenAI for IT Assistant Solutions
	Development of GenAI for Document Extraction, Classification, And Summarization
	Development of GenAI for Marketing Solutions
	Development of GenAI for CX Assistant Solutions
	Development of GenAI for Due Diligence Solutions
	Development of GenAI for Software Development Solutions
	Development of GenAI for Data Analytics Solutions

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



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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:

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