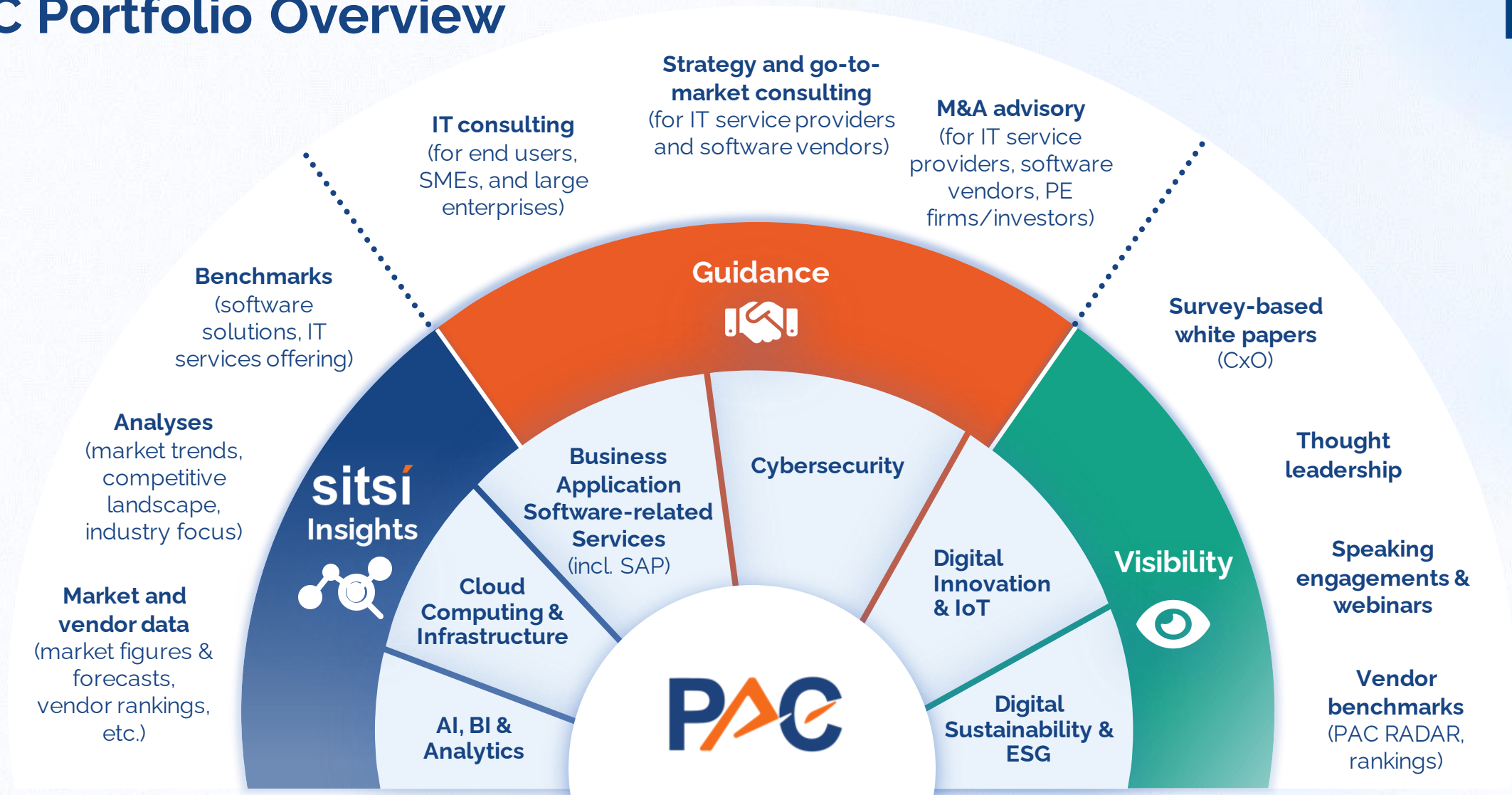


# PAC Research Agenda 2025

SITSI<sup>®</sup>, RADAR, CxO  
Surveys & Rankings



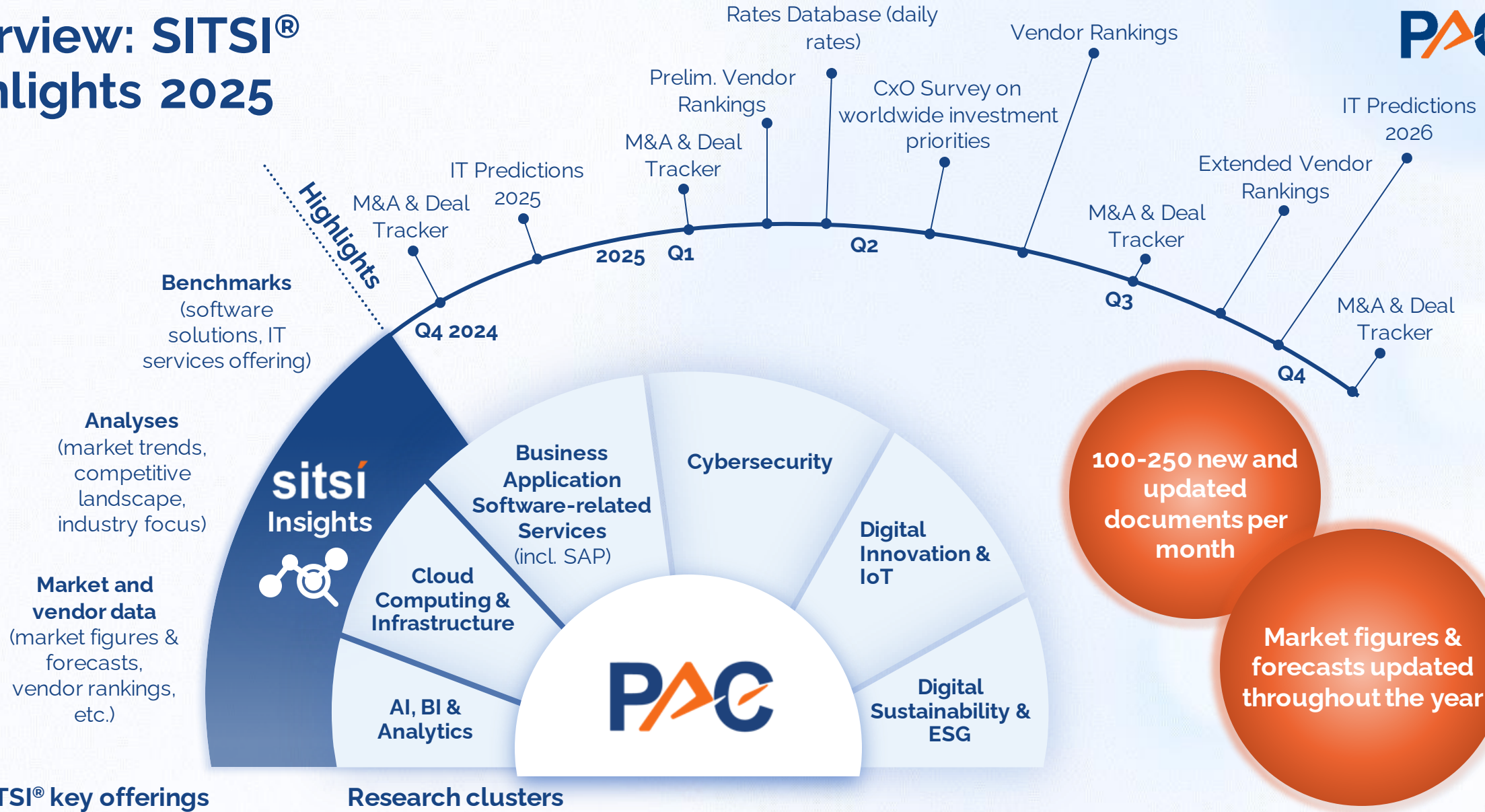
# PAC Portfolio Overview



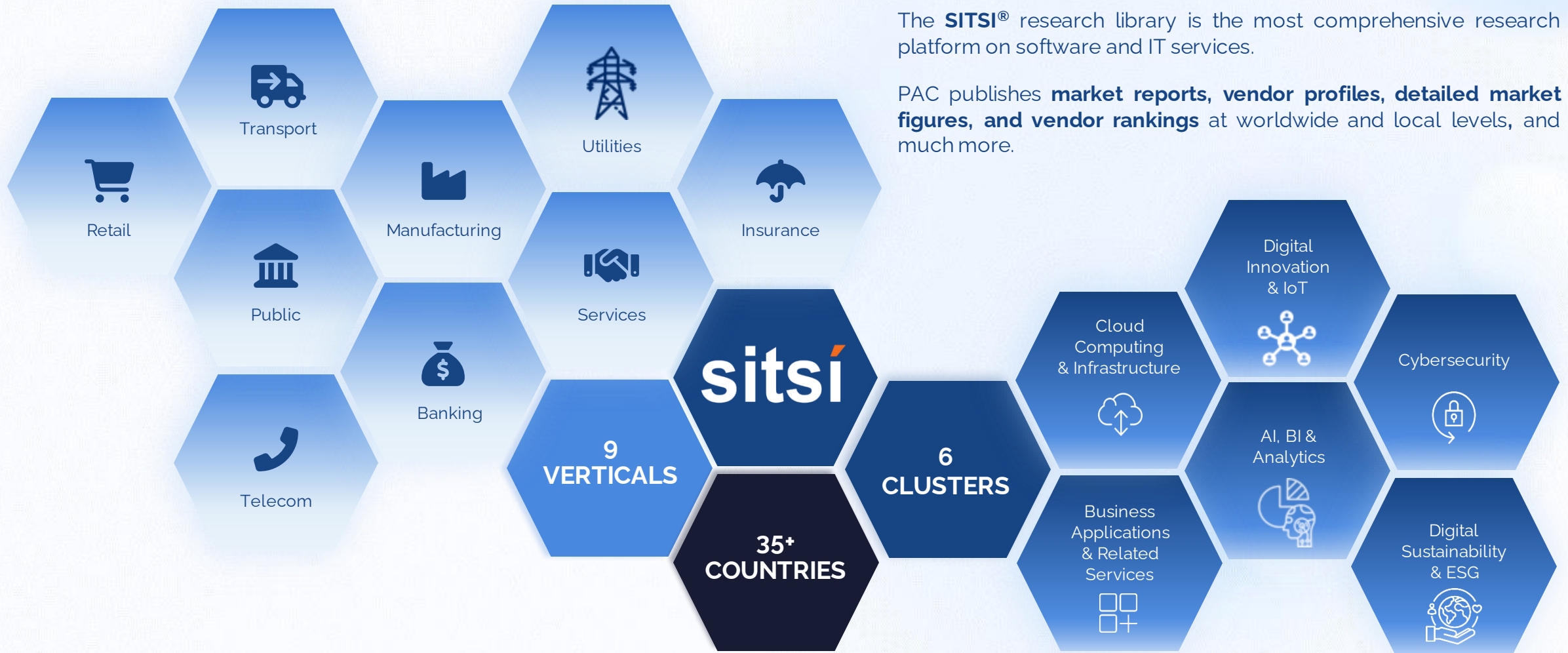
Key offerings

Research clusters

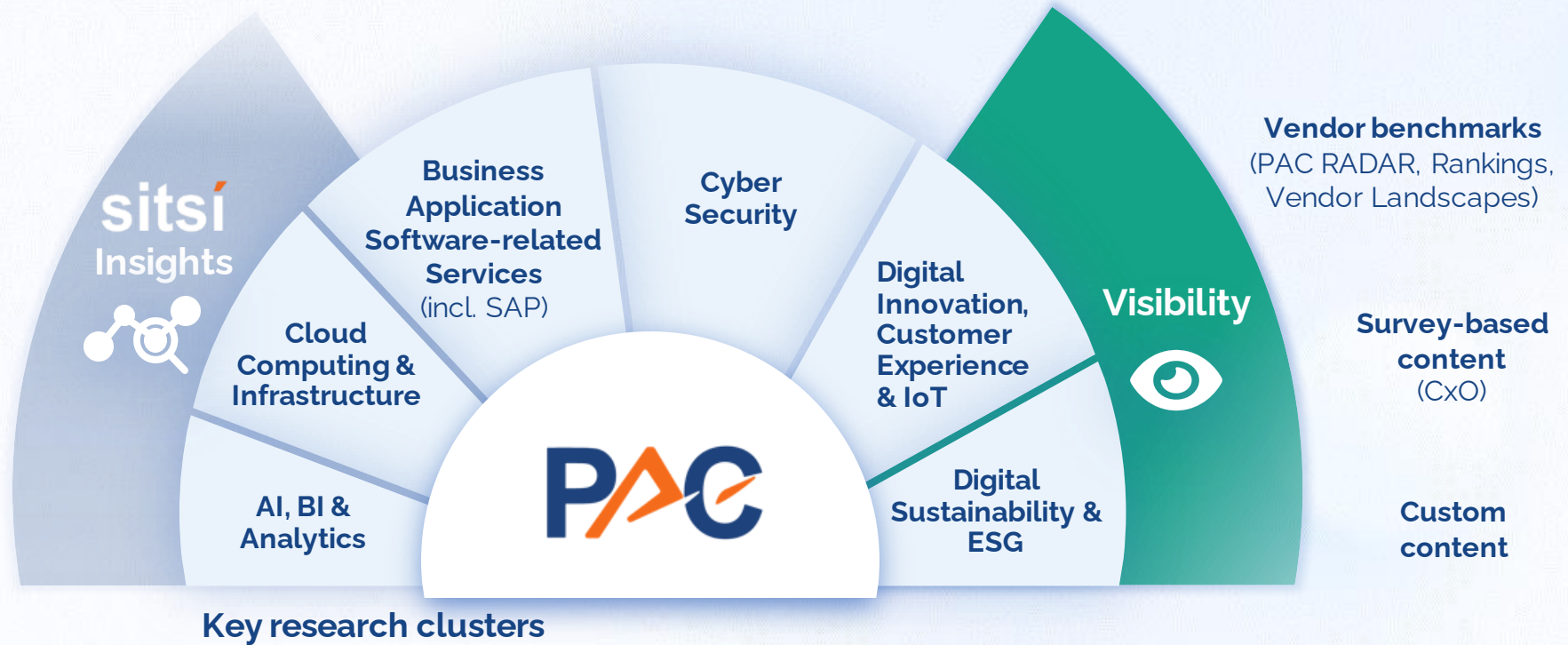
# Overview: SITSI® Highlights 2025



# SITSI® Market Research Services



# Overview: PAC Visibility Portfolio



# PAC Research Products 2024-2026



Date of publication  
(Production starts 4-5 months before  
publication.)



Date of publication  
(Production starts 2-3 months before publication.)



Date of publication



Date of publication

		Date of publication (Production starts 4-5 months before publication.)	Date of publication (Production starts 2-3 months before publication.)	Date of publication	Date of publication
2024	Q3	AI-related Services	SAP	Vendor Rankings by topics	
	Q4	Google Cloud Services	AI Cybersecurity (Cyber Resilience)		
2025	Q1	ServiceNow Services	Sustainability		Cloud C&SI
	Q2		SAP	Vendor Rankings by geo & verticals	Generative AI C&SI practices
	Q3	Open Digital Platforms AI-related Services	Banking Industry	Vendor Rankings by topics	Cloud operations
	Q4	Sustainability-related Services Azure Services	Cloud		SOC services
2026	Q1	SAP-related Services Salesforce Services	Manufacturing Industry		Responsible AI C&SI practices
	Q2	Adobe Services	Cybersecurity/AI	Vendor Rankings by geo & verticals	ESG platforms

# PAC Research Agenda Q3 & Q4 2024



## RADAR

Date of publication  
(Production starts 4-5 months before publication.)

## CxO Surveys

Date of publication  
(Production starts 2-3 months before publication.)

## Vendor Rankings

Date of publication

2024

Q3

### AI-related Services

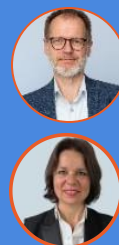
#### Scope

- AI-related C&SI
- GenAI-related C&SI
- HCM
- DCE
- Back-office workflows
- Production
- SCM & logistics
- IT operations
- German Mittelstand

#### Coverage



#### Analysts



### SAP

#### Scope

- S/4HANA migration status
- SAP cloud-centric approach
- Willingness of clients
- Companies' approach to process modernization, BTRP-based customizing, integration of AI
- Companies' demands on the consultants

#### Coverage



#### Analysts



### Extended Vendor Rankings (topics)

- SAP Services
- Cloud
- AI & Analytics
- IT Security
- Digital Customer Engmt.
- Salesforce C&SI



Q4

### Google Cloud Services

#### Evaluation Criteria:

- Focus on GCP vs other hyperscalers
- Certification of employees
- Go-to-market strategy
- Investments in IP
- AI capabilities
- Vertical capabilities

#### Coverage



#### Analysts



### Artificial Intelligence

#### Scope

- Investment priorities
- Trends: strategies, capabilities, policy decisions

#### Coverage



#### Analysts



### Cybersecurity

#### Scope

- Cyber resilience strategies
- Supporting solutions
- Protection against cyber attacks

#### Coverage



#### Analysts



The contents listed may differ from the final products.

# PAC Research Agenda Q1 & Q2 2025



## RA<sup>D</sup>AR

Date of publication  
(Production starts 4-5 months before publication.)

## CxO Surveys

Date of publication  
(Production starts 2-3 months before publication.)

## Vendor Rankings

Date of publication

2025

Q1

### ServiceNow Services

#### Scope

- For IT
- For HR
- For GRC
- For CSM
- For Security
- For NowPlatform

#### Coverage



#### Analysts



### Sustainability

#### Scope

- Investment strategies and priorities
- Sustainability initiatives
- Regulatory requirements

#### Coverage Analysts



### Investment Priorities



Q2

### SAP

#### Scope

- S/4HANA migration status
- SAP cloud-centric approach
- Willingness of clients
- Companies' approach to process modernization, BTRP-based customizing, integration of AI
- Companies' demands on the consultants

#### Coverage Analysts



### Vendor Rankings by geography and verticals

- For 4 regions, 20 countries and 9 verticals
- IT services and SW
- Preliminary rankings in March-April
- Final rankings in June - August



The contents listed may differ from the final products.



## RA<sup>D</sup>AR

Date of publication  
(Production starts 4-5 months before publication.)

## CxO Surveys

Date of publication  
(Production starts 2-3 months before publication.)

## Vendor Rankings

Date of publication

2025

Q3

### Open Digital Platforms

#### Scope

- PLM-services
- Industrial edge
- Industrial copilots
- Connected workers (AR)
- ...

#### Coverage



#### Analysts



### Banking Industry

#### Scope

- Retail
- Corporate
- Private (wealth)
- Investment

#### Coverage



#### Analysts



### AI-related Services

- AI-related C&SI
- GenAI-related C&SI
- HCM
- DCE
- Back-office workflows
- Production
- ...



### Extended Vendor Rankings (topics)

- SAP Services
- Cloud
- AI & Analytics
- IT Security
- Digital Customer Engmt.
- Salesforce C&SI



The contents listed may differ from the final products.

# PAC Research Agenda Q4 2025



## RA<sup>D</sup>AR

Date of publication  
(Production starts 4-5 months before publication.)

## CxO Surveys

Date of publication  
(Production starts 2-3 months before publication.)

## Vendor Rankings

Date of publication

2025

Q4

### Sustainability-related Services

#### Scope

- Sustainable IT, supply chain, product life cycle, assets
- ESG monitoring, controlling & reporting
- ESG strategy & roadmap

#### Coverage



#### Analysts



### Azure Services

#### Scope

- App development & management
- C&SI
- Data & AI
- IaaS/PaaS & security
- Outsourcing & managed services
- Workplace



### Cloud Scope

- IT infrastructure modernization and transformation strategies
- (Gen)AI infrastructure – on-prem, private cloud, public cloud, SaaS (status quo, planning, needs, etc.)

#### Coverage



#### Analysts



The contents listed may differ from the final products.

# PAC Research Agenda Q1 & Q2 2026



## RA•DAR

Date of publication  
(Production starts 4-5 months before publication.)

## CxO Surveys

Date of publication  
(Production starts 2-3 months before publication.)

## Vendor Rankings

Date of publication

2026

Q1

### SAP-related Services

#### Scope

- S/4HANA services
- CX-related services
- Public cloud-based hosting
- etc.

#### Coverage



#### Analysts



### Salesforce Services

#### Scope

- Financial Services
- Manufacturing
- Public
- etc.



### Manufacturing Industry

#### Scope

- IT/OT/ET integration concepts
- Relevance & maturity of use cases for industrial AI, smart robots, industrial metaverse
- Digital communities (Catena-X, Eclipse)
- Status quo of OT security
- User preferences in IT buying

#### Coverage



### Investment Priorities



Q2

### Adobe Services

#### Scope

- Overall
- Financial Services
- Manufacturing
- Retail
- Telco

#### Coverage

#### Analysts



### AI/Cybersecurity

#### Scope

- IT resilience – from backup data centers to cloud (status quo, planning, etc.)

#### Coverage



### Vendor Rankings by geography and verticals

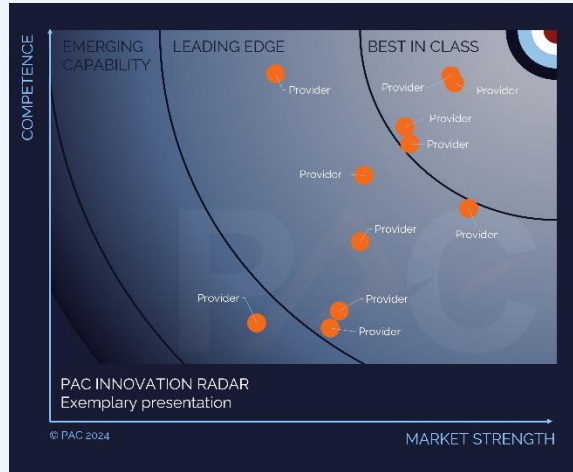
- For 4 regions, 20 countries and 9 verticals
- IT services and SW
- Preliminary rankings in March-April
- Final rankings in June



# Classification of PAC Vendor Benchmarking Products

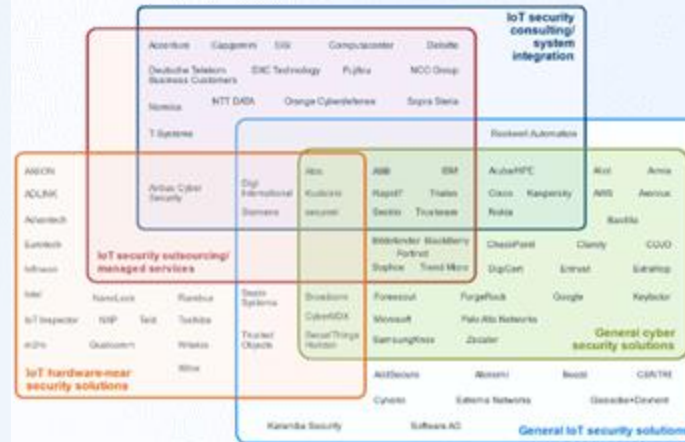


Shortlist:  
**RA****DAR**  
(benchmarking)



The PAC RADAR is a tool for the holistic evaluation and visual positioning of software suppliers and IT service providers on local markets. It supports IT buyers in the selection of suitable IT partners.

Longlist:  
**Vendor Landscapes**  
(positioning)



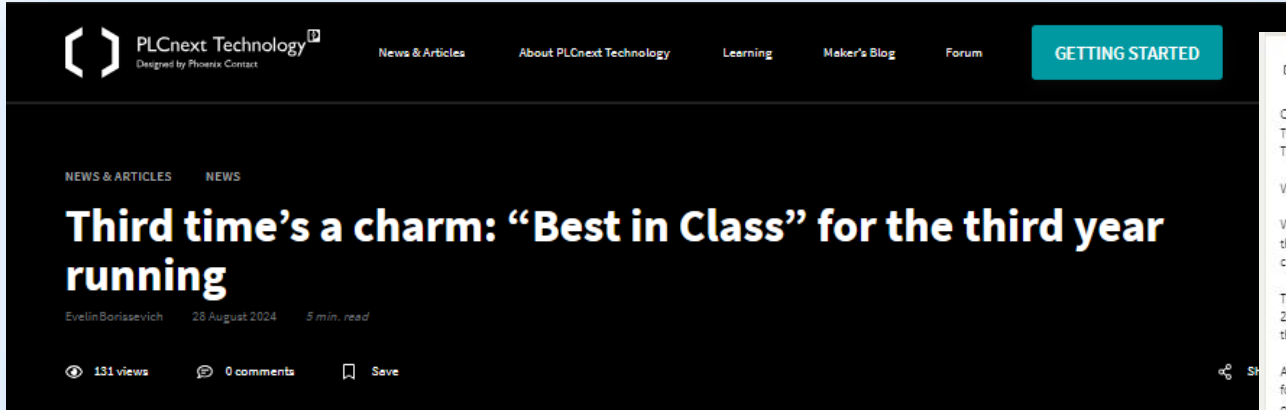
PAC Vendor Landscapes provide a comprehensive overview of leading and innovative players in selected countries, industries, or horizontal topics.

Revenue, growth, market share:  
**Vendor Rankings**  
(market leadership)

Germany - Leading IT Services* Providers in FY 2021 (in million EUR)							
Rank	Company	Nationality	FY End**	Revenue 2020	Revenue 2021	Growth 2020/21	Market Share 2021
1	T-Systems	DE	31. Dec 21	2,280	2,200	-4%	5.1%
2	Accenture	US	31. Aug 21	1,722	1,912	11%	4.5%
3	Atos	FR	31. Dec 21	1,887	1,800	-5%	4.2%
4	Capgemini	FR	31. Dec 21	1,093	1,320	21%	3.1%
5	IBM (Pro-forma w/o Kyndryl)	US	31. Dec 21	1,215	1,275	5%	3.0%
6	Kyndryl (Pro-forma, spinoff from IBM)	US	31. Dec 21	1,221	1,175	-4%	2.7%
7	DXC Technology	US	31. Mar 21	1,277	1,170	-8%	2.7%
8	Computacenter	UK	31. Dec 21	651	724	11%	1.7%
9	SAP	DE	31. Dec 21	730	707	-3%	1.6%
10	NTT Data	JP	31. Mar 21	700	700	0%	1.6%
11	Bechtle	DE	31. Dec 21	677	692	2%	1.6%
12	TCS (Tata Consultancy Services)	IN	31. Mar 21	554	682	23%	1.6%
13	msg group	DE	31. Dec 21	620	650	5%	1.5%
14	Infosys	IN	31. Mar 21	531	601	13%	1.4%
15	Arvato	DE	31. Dec 21	569	594	4%	1.4%

PAC Vendor Rankings position and rank the most important software suppliers and IT service providers by revenue, growth, and market share in various countries, segments, and industries.

# See How Our Clients Use the PAC RADAR



What's better than winning an award? Winning it three years in a row!

We are excited to announce that PLCnext Technology designed by Phoenix Contact has been recognized as "Best in Class" in the category "Open Digital Platforms for Industrial Edge Management in Europe 2024" by PAC RADAR for the third year in a row! This award highlights our dedication to innovation, openness, and outstanding performance in industrial automation.

VIEW MORE FROM

- > Best in Class > Best in Class 2024
- > OPEN DIGITAL PLATFORMS
- > PAC RADAR > PLCnext Technology

Phoenix Contact  
157.103 Follower:innen  
2 Wochen · 🌐

Once could be luck  
Twice might be coincidence  
Three times is pure skill

What's better than winning a...

We're proud to announce that the Open Digital Platforms fit category by PAC for the third...

This award highlights our line 2016, we've been on a mission this recognition keeps us motivated.

A huge thank you to our amazing community for your continuous support of industrial automation! 🙌

#plcnext #iamplcnext #best #industrialedgemanagement

Übersetzung anzeigen



Greg Rinke gefällt das

Nico Scherpereel gefällt das

Lotte Van Si

Phoer 197.10  
2 Wochen

Wat is er moole winnen!

PLCnext op een rij Platforms

Deze prijs: industriële auto industriële auto motivatie om u

Samen geven we

#plcnext #edge

Übersetzung anzeigen

Gefällt mir 46

Kommentar

PAC 8.241 Follower:innen  
1 Woche · 🌐

We're seeing growing adoption of industrial edge management solutions in the market and have recognized PLCnext Technology from Phoenix Contact as a best-in-class platform in this space.

This is based on two simple facts – constant progress towards more openness of the PLCnext platform and ecosystem leadership with its developer community. - Arnold Vogt, Head of Digital & IoT, PAC

Learn more about PLCnext Technology's positioning in our Open Digital Platforms for the Industrial World in Europe 2024 RADAR: [https://lnkd.in/deTa9q\\_U](https://lnkd.in/deTa9q_U)

#PACRADAR #ITcompanies #positioning #industrialedgemanagement

Übersetzung anzeigen

PAC INNOVATION RADAR  
Open digital platforms for industrial edge management

© PAC 2024

Gefällt mir 46

1 Kommentar · 13 direkt geteilte Beiträge

Gefällt mir Kommentar Teilen Senden

# What Our Customers Say About the PAC RADAR



PAC has long been a trusted source of relevant market data and valuable insights that we use to fine-tune our portfolio strategy and support business decisions. Given PAC's reputation and credibility, the PAC RADARs are credible proof of our competencies and market position. We proudly refer to the assessments in front of our prospects and customers.

- Uwe Birkenhauer, Head of SAP Portfolio Management



# Our Value Proposition for CxO Surveys



Harness the power of your customers' voice. Receive engaging content and powerful market insights that help you **position yourself as a thought leader**.

Leverage survey data from our quarterly CxO Surveys to produce your own custom thought-leadership content at **a fraction of the cost**.

Your **content is customized** to support your communication strategy with **reliable, valid, and objective data** points.

**Understand and target your European clients'** use cases, challenges, investment priorities, opportunities, and more.

# Client Example: CxO Survey

## Rising up to the cloud



## RISE with SAP and SAP S/4HANA [2024]

Other available content formats:

- Webinar participation
- Speaking engagement
- Q&A/interview (on video or in written form)
- Blog post
- Podcast





# Use cases for Vendor Rankings in communication, marketing & strategy

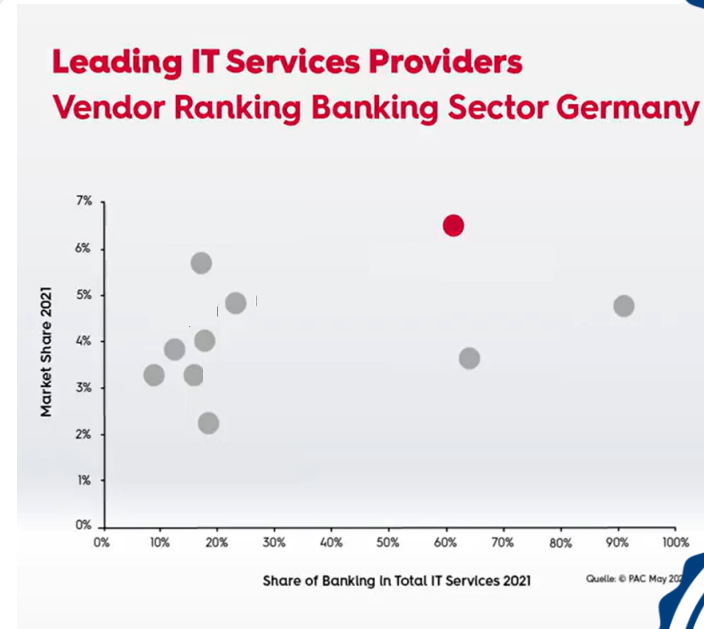
Show your market strength in investor & analyst presentations

Build trust with clients by demonstrating your expertise in RFIs

Communicate your market leadership to potential customers

Understand your positioning compared to your competitors

Determine gain or loss of market share



Non-binding sample presentation

## More than 2 million impression in total

Christophe Chalons • 1.  
Chief Analyst & Head of Research at PAC (Pierre Audoin Consultants)  
5 Monate •

Top 15 IT Services in Americas - Accenture confirms leadership, Deloitte & EY fastest growing.  
PAC published its first vendor rankings by 2023 IT services revenue in ... mehr

Übersetzung anzeigen

Company	Market Share
accenture	6.1%
Deloitte.	4.2%
IBM	3.7%
tcs	3.4%
cognizant	3.1%
Infosys	2.5%
GDIT	2.2%
pwc	2.1%
leidos	1.8%
HCLTech	1.7%
Capgemini	1.7%
kyndryl	1.5%
Peraton	1.5%
DELLTechnologies	1.4%
EY	1.4%

1.153 Reaktionen • 23 Kommentare • 90 direkt geteilte Beiträge

Gefällt mir • Kommentar • Teilen • Senden

Christophe Chalons • 1.  
Chief Analyst & Head of Research at PAC (Pierre Audoin Consultants)  
5 Monate • Bearbeitet •

Top 15 IT Services in EMEA - Accenture and Capgemini confirm their lead, Sopra Steria and Deloitte fastest growing.  
PAC published its first vendor rankings by 2023 EMEA revenue. No ... mehr

Übersetzung anzeigen

Company	Market Share
accenture	6.2%
Capgemini	4.1%
IBM	2.9%
tcs	2.9%
AtoS	2.3%
Deloitte.	2.1%
DXC	2.0%
kyndryl	1.9%
NTT DATA	1.9%
sopra steria	1.7%
CGI	1.6%
Infosys	1.5%
pwc	1.4%
F Systems	1.2%
cognizant	1.2%

4.919 Reaktionen • 71 Kommentare • 396 direkt geteilte Beiträge

Gefällt mir • Kommentar • Teilen • Senden

Christophe Chalons • 1st  
Chief Analyst & Head of Research at PAC (Pierre Audoin Consultants)  
6mo • Edited •

Top 10 IT Services - Accenture confirms its leadership, NTT Data enters the Top 5  
PAC published yesterday its first vendor rankings by 2023 revenue. ...more

Company	Market Share
accenture	5.7%
IBM	2.9%
tcs	2.7%
Deloitte.	2.6%
NTT DATA	2.2%
Capgemini	2.2%
cognizant	1.8%
Infosys	1.7%
FUJITSU	1.7%
kyndryl	1.6%

2,555 Reaktionen • 56 comments • 265 reposts

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# Digital Europe Update Newsletter



## Sign up for our weekly update on the software and IT services (SITS) market in Europe

This newsletter provides a round-up of our latest analysis on how European organizations are pushing ahead with their digital initiatives, and how key SITS suppliers are responding to the changing market conditions.

Each week, you will receive a round-up of the major news stories, contract awards, M&A and investment activity, and insight into forthcoming opportunities.

**SUBSCRIBE NOW**

**PAC** DIGITAL EUROPE UPDATE  
No.2 / September 2024

Welcome to PAC's weekly update on the software and IT services (SITS) market in Europe. Here we provide a round-up of our latest analysis on how European organizations are pushing ahead with their digital initiatives, and how key SITS suppliers are responding to the changing market conditions. Each week, we will provide a round-up of the major news stories, contract awards, M&A and investment activity and insight into forthcoming opportunities.

**NEWS**

AWS has unveiled plans to invest £8bn over the next five years building, operating, and maintaining data centres in the UK.

Technology and data consultancy **Transform UK** is to acquire public sector change management specialist Cadence Innova.

**DEALS**

In this section, we provide an update on the latest software and IT services contract awards across Europe, as recorded in our Deal Tracker service.

Account	Sector	Region	Vendor	Overview
Arsenal FC	Services	UK	NTT Data	NTT Data has become Arsenal's official digital transformation partner, and will provide data analytics tools, machine learning and real-time data integrations.
City of Edinburgh	Public	UK	Access Mosaic	The City of Edinburgh Council has selected Access Mosaic to support the transformation of both digital social care and justice social work services.



Your partner of choice for  
European-focused IT market  
data, insights, and advice.

**For any questions  
contact-us**

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