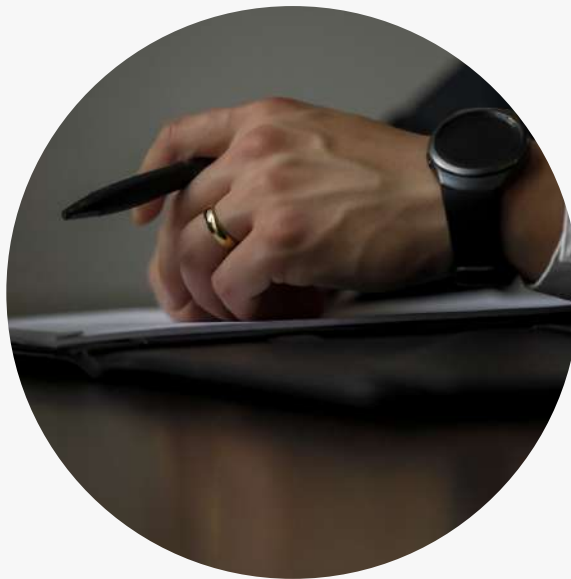# THE IOT C&SI SURVEY 2020

This document is a summary of the headline results produced by teknowlogy for

NTT DATA

"Over the last few years, NTT DATA has – based on its very strong implementation skills – developed a consistent and very strong portfolio, from digital design through strong AI & analytics capabilities and cloud transformation to the IoT device area.
With its end-to-end capabilities, from consulting-design-implementation to application management & operations, and thanks to the collaboration with NTT Group and its network capabilities, NTT DATA has a unique position in the market."

Klaus Holzhauser
Senior Vice President
Digital Innovation & IoT at teknowlogy Group

About teknowlogy

teknowlogy Group iis the leading independent European research and consulting firm in the fields of digital transformation, software, and IT services. It brings together the expertise of three research and advisory firms, each with a strong history and local presence in the fragmented markets of Europe.

We are a content-based company with strong consulting DNA.

We are the preferred partner for European user companies to define an IT strategy, govern teams and projects, and de-risk technology choices that drive successful business transformation.

We have a second-to-none understanding of market trends and IT users' expectations. We help software vendors and IT service companies better shape, execute, and promote their own strategy in coherence with market needs and in anticipation of tomorrow's expectations.

Capitalizing on more than 40 years of experience, we operate out of seven countries with a network of 150 experts.

teknowlogy Group is uniquely positioned at the converging point of the key driving forces of digitalization and can meet its customers' requirements in terms of:

- Reliable research data and consulting to drive decisions and go-to-market strategies in a rapidly changing IT environment.
- Increasing demand for a local understanding of both the user needs in the various industries and the local vendor landscape, which is something the global, US-based players fail to properly address.
- Significant demand for critical insight necessary to assess and adapt to the paradigm shift caused by rapidly expanding cloud-based IT.

"Understanding the needs of every line of business in the enterprise is key. We at teknowlogy Group are already there."

About The IoT C&SI Survey

The IoT C&SI Survey is the world's first customer-centric benchmark for the performance of numerous consulting & system integration providers on projects related to the Internet of Things.

The findings provide an unparalleled level of user feedback on 32 leading IoT providers.

ABOUT THE COMPANY

ABOUT NTT DATA

NTT DATA is one of the top global IT services providers and it is now making strong progress in its bid to break into the elite pack at a global level.

The vendor already ranks as one of the world's ten largest IT services suppliers. PAC places it in seventh place in their latest available IT Services Ranking.

The company has operations in more than 50 countries, with a huge systems integration and managed services business.

The global market leader for IT services
entered already the global Top 10 and grows further

NTT DATA has a very strong presence in Japan's IT services market as system integrator and has long-term relationships with major global Japanese companies. On top of this, NTT DATA has significantly improved its global capabilities in recent years by growing its overseas business to about 41% of its revenue. It can already be considered a significant player in markets such as the US, the UK, Germany, Spain, Italy and Australia.

The company has operations in more than 50 contries, combines deep industry expertise innovations across a comprehensive portfolio of consulting, application, infrastructure and business process services. The most transformational of NTT DATA's recent deals was its purchase of Dell Services in 2016, which gave it a major bridgehead in North America. It has built on this in the last years with some additional acquisitions and has the scale to regularly secure significant roles on major contract frameworks. NTT DATA´s recent acquisitions include 700-strong Canadian IT services vendor Sierra Systems and Flux7, an Amazon Web Services (AWS) Premier Consulting Partner.

As part of the NTT Group, they have a unique market position, by offering end-to-end solutions from Consulting to System integration, Infrastructure operations and even down to the network itself
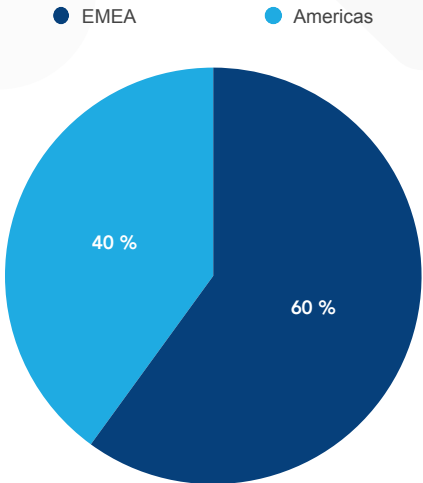.
NTT DATA has strong focus on Customer Digital Transformation Activities. Therefore we positioned 6 digital Focuses Areas (DFA) – Cyber Security, AI, Intelligent Automation, Optimized IT, Customer Experience and IoT). Along this 6 DFA we are jointly driving our customers and transforming them from strategic consulting, implementation and long term managed Services perspective to success.

NTT DATA has strong vendor-agnostic approach, together with strong inhouse software development capabilities. These skills make NTT DATA capable of serving the broad needs of their global clients.

NTT DATA supports a broad range of industry sectors, but has core strengths in financial services, manufacturing, healthcare and telecommunication. From a European point of view, NTT DATA has very strong competencies in the automotive sector, especially in Germany (Daimler, BMW and Volkswagen belong to their client base).

Demographics of survey respondents

Geography

- EMEA
- Americas

EMEA 60 %
Americas 40 %

Job title

IT manager / CIO	34 %
Management board or deputy	28 %
Project manager	20 %
Digital business unit member	8 %
Business consultant	7 %
Line of business manager	1 %
Other position	1 %

Industry sector

Manufacturing	50 %
Telecommunications	18 %
Transportation and logistics	7 %
Public sector and healthcare	7 %
Energy and utilities	6 %
Retail and wholesale	5 %
Other industry	6 %

Company size

- 500 - 999 employees
- 1,000 - 4,999 employees
- More than 5,000 employees

500 - 999 employees 33 %
1,000 - 4,999 employees 50 %
More than 5,000 employees 17 %

n = 1,976

7

Peer groups & KPIs

KPIs

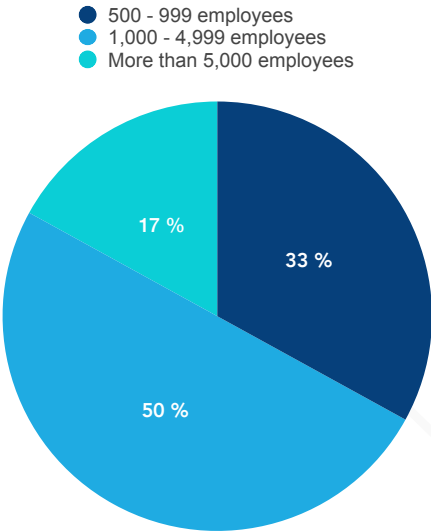The results of The IoT C&SI Survey 2020 are displayed in the form of KPI dashboards to provide the reader with precise information at a glance. The KPIs are all based on the following rules:

- We chose only those parameters found to be of the greatest importance to customers.
- KPIs may be based on one or more parameters from The IoT C&SI Survey.
- Only providers evaluated by at least 20 respondents are included. This applies to each of the questions that feed into the KPIs.
- KPIs are converted to a scale of 1 to 10 (worst to best).
- A linear min-max transformation is applied, which preserves the order of, and the relative distance between, providers' scores.
- In case two or more providers have the same score, their ranks are determined based on the next decimal place.

The terms "top-ranked" and "leader" as used in the KPI chart titles indicate "topmost position" (top-ranked) or a leading position (leader) in the top 3 to top 5 – depending on the size of the peer group.

Peer group classification

The IoT C&SI Survey 2020 features a range of different types of providers, which is why we use peer groups to help identify competing services. The groups are essential to allow a fair and useful comparison of providers likely to compete. The peer groups were defined by teknowlogy's analysts drawing on their experience as well as customer responses, since a provider needs a minimum of 20 answers per peer group in order to compete. The segmentation is based on two key factors:

- Regional focus: Companies in EMEA and the Americas were asked to share their opinions on their IoT C&SI partners, so if a provider competes in a regional peer group, only the responses from that region count towards their rank.
- Project scenario: Depending on the context of the projects as well as the industries the customers represent, providers can further compete in usage-related groups driven by the responses from the respective clients.

NTT DATA is present in the following peer groups:

- Americas
- EMEA
- Consulting

Peer group overview

Regional Focus

- Americas
- EMEA
- DACH
- France
- UK

Project Scenario

Consulting
Particular focus on consulting-driven projects

Connected Vehicles
Providers evaluated in projects related to IoT in vehicles, logistics, and automotive manufacturing

Digital Factory
Providers supporting discrete and process manufacturing companies with requirements around IoT

Smart Cities
Providers building the connected city of the present and future within projects with public and private institutions

NTT DATA HIGHLIGHTS

NTT DATA HIGHLIGHTS

Peer group **Americas**	Peer group **EMEA**	Peer group **Consulting**
Top ranked in the category:	Top ranked in the category:	Top ranked in the category:
Solution Development Efficiency	Implementation Skills Flexibility	Implementation Skills Implementation Solution Development Flexibility Business Value
Leader in the category:	Leader in the category:	Leader in the category:
Solution Building Flexibility Business Value	Strategic IoT Advisory Implementation Solution Development Proactivity Collaboration Recommendation Customer satisfaction Effectiveness Business Value	Solution Building Recommendation Customer Satisfaction Efficiency Effectiveness

teknowlogy GROUP
comment

NTT Data is one of the top vendors when it comes to Solution Development and Implementation. The company can prove through this survey as well that they deliver IoT solutions with a high level of customer satisfaction and with outstanding business value. In addition NTT DATA is one of the key vendors for clients when flexibility is required on the delivery side.

"Top-ranked" indicates the topmost position among providers listed in the chart.
"Leader" denotes a leading position in the respective peer group – usually among the top 3 – top 5, depending on the size of the group.

TOP PROVIDER RANKS

NTT DATA top ranks

Top-ranked in
SOLUTION DEVELOPMENT
Peer group
Americas and Consulting
teknowlogy

Top-ranked in
EFFICIENCY
Peer group
Americas
teknowlogy

Top-ranked in
FLEXIBILITY
Peer group
EMEA and Consulting
teknowlogy

Top-ranked in
IMPLEMENTATION SKILLS
Peer group
EMEA and Consulting
teknowlogy

Top-ranked in
IMPLEMENTATION
Peer group
Consulting
teknowlogy

Top-ranked in
BUSINESS VALUE
Peer group
Consulting
teknowlogy

Leader in
STRATEGIC IOT ADVISORY
Peer group
EMEA
teknowlogy

Leader in
IMPLEMENTATION
Peer group
EMEA
teknowlogy

Leader in
SOLUTION DEVELOPMENT
Peer group
EMEA
teknowlogy

Leader in
SOLUTION BUILDING
Peer group
Americas and Consulting
teknowlogy

Leader in
FLEXIBILITY
Peer group
Americas
teknowlogy

Leader in
Proactivity
Peer group
EMEA
teknowlogy

Leader in
COLLABORATION
Peer group
EMEA
teknowlogy

Leader in
RECOMMENDATION
Peer group
EMEA and Consulting
teknowlogy

Leader in
CUSTOMER SATISFACTION
Peer group
EMEA and Consulting
teknowlogy

Leader in
EFFECTIVENESS
Peer group
EMEA and Consulting
teknowlogy

Leader in
EFFICIENCY
Peer group
EMEA
teknowlogy

Leader in
BUSINESS VALUE
Peer group
Americas and EMEA
teknowlogy

INTRODUCTION

The IoT C&SI Survey 2020 examines customer feedback on IoT consulting and system integration provider selection and partnerships across 24 key performance indicators (KPIs), including competitiveness, consulting skills, implementation, solution building, collaboration, customer satisfaction, and business value.

This document contains a selection of the headline findings for **NTT DATA**

For more information on the survey, please visit www.iot-csi-survey.com.

STRATEGIC IOT ADVISORY

"Strategic IoT Advisory" refers to the perceived capabilities in IoT strategy development and execution.

STRATEGIC IOT ADVISORY

Strategic IoT Advisory : Leader
Peer group: EMEA

Company	Score
Accenture	10.0
Reply	8.9
Capgemini (incl. Altran)	8.2
NTT Data	8.2
IBM	8.1
Atos	8.0
CGI	7.9
Cognizant	7.7
Infosys	7.5
HPE	7.5
TCS	7.3
Vadafone	6.9
EY	6.8
DXC	6.4
Wipro	6.4
KPMG	6.0
Deloitte	5.8
Tieto	5.4
T-Systems	5.2
Tech Mahindra	4.9
Telefónica	4.2
HCL	3.4
PwC	2.7
Sopra Steria	1.0
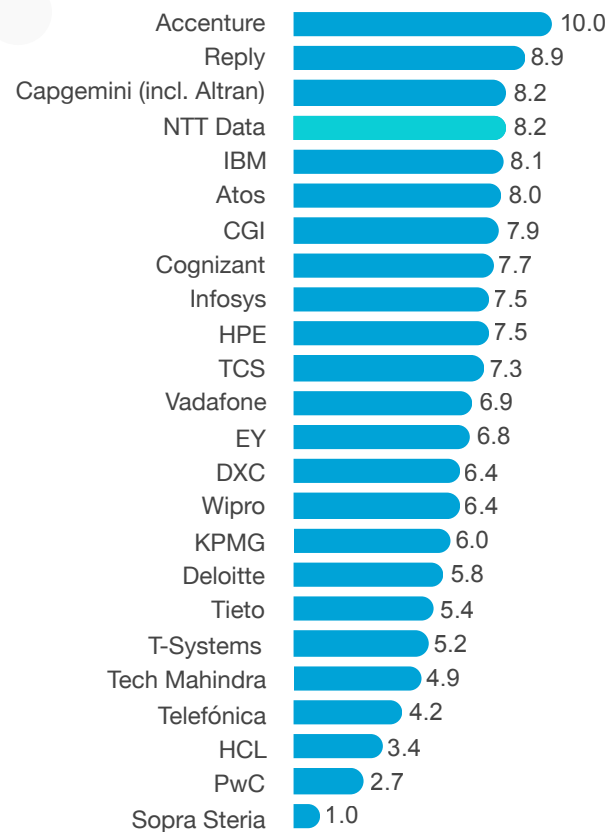
teknowlogy GROUP

The participants in this survey ranked NTT DATA among the top vendors for strategic IoT advisory in Europe. This underlines that NTT DATA has enhanced its capabilities already far beyond pure systems integration and managed services, especially in Europe. One push in this direction was the announcement of an AI & IoT Business Section which comprises around 200 data scientists, consultants, and analysts, together with 1,500 embedded technology developers. NTT DATA expects this team to further boost the company's existing IoT advisory capabilities, not only in Europe, but also in other regions across the world.

IMPLEMENTATION SKILLS

"Implementation Skills" reflects the perceived expertise in implementation activities.

IMPLEMENTATION SKILLS
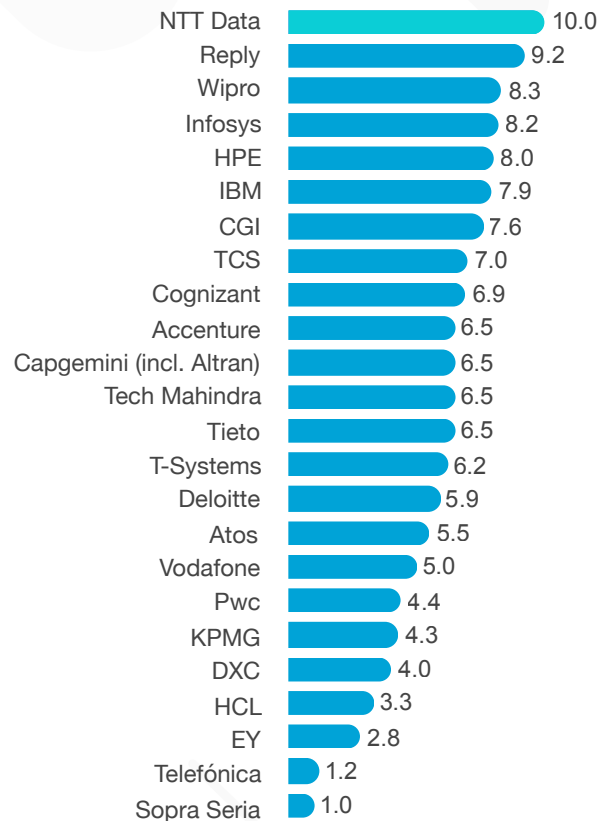
Implementation Skills: Top Ranked
Peer group: EMEA

Company	Score
NTT Data	10.0
Reply	9.2
Wipro	8.3
Infosys	8.2
HPE	8.0
IBM	7.9
CGI	7.6
TCS	7.0
Cognizant	6.9
Accenture	6.5
Capgemini (incl. Altran)	6.5
Tech Mahindra	6.5
Tieto	6.5
T-Systems	6.2
Deloitte	5.9
Atos	5.5
Vodafone	5.0
Pwc	4.4
KPMG	4.3
DXC	4.0
HCL	3.3
EY	2.8
Telefónica	1.2
Sopra Seria	1.0

Implementation Skills: Top Ranked
Peer group: Consulting

Company	Score
NTT Data	10.0
Accenture	9.2
IBM	8.3
CGI	8.2
Cognizant	8.0
Capgemini (incl. Altran)	7.9
Infosys	7.6
Deloitte	7.0
Wipro	6.9
KPMG	6.5
EY	6.5
PwC	6.5
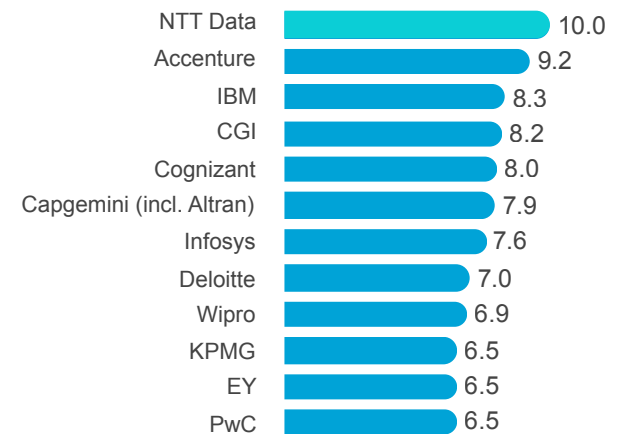
teknowlogy GROUP

The participants in this survey ranked NTT DATA as the top vendor for IoT implementation skills in Europe and also across the peer group of all consulting companies. This illustrates well that NTT DATA not only has strong systems integration and managed services capabilities in Japan, but also across the globe, and especially in Europe. An important aspect in this context is the presence of dedicated in-house software development capabilities to adapt solutions to the specific needs of large clients. Delivering end-to-end solutions is key in the complex world of IoT.

IMPLEMENTATION

"Implementation" measures the overall satisfaction with implementation-related projects in terms of time management and know-how.

IMPLEMENTATION

Implementation: Leader
Peer group: EMEA

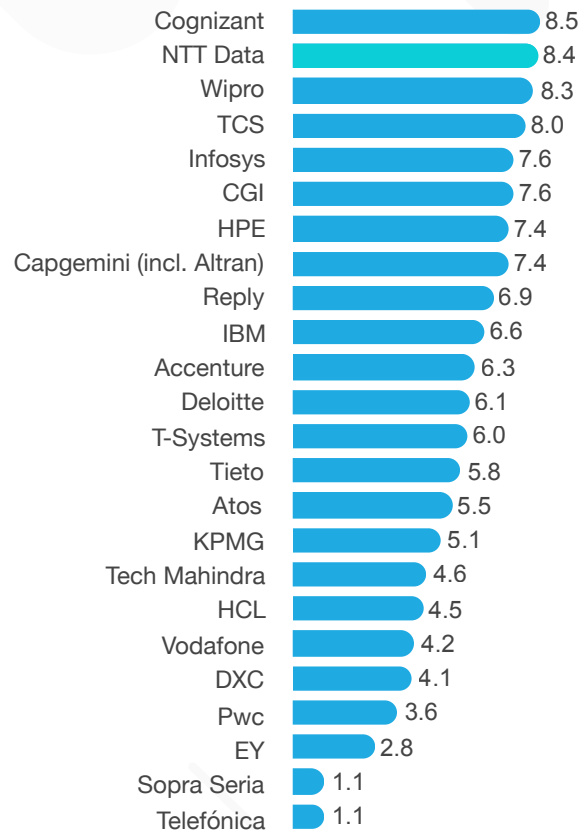| Company	Score
Cognizant	8.5
NTT Data	8.4
Wipro	8.3
TCS	8.0
Infosys	7.6
CGI	7.6
HPE	7.4
Capgemini (incl. Altran)	7.4
Reply	6.9
IBM	6.6
Accenture	6.3
Deloitte	6.1
T-Systems	6.0
Tieto	5.8
Atos	5.5
KPMG	5.1
Tech Mahindra	4.6
HCL	4.5
Vodafone	4.2
DXC	4.1
Pwc	3.6
EY	2.8
Sopra Seria	1.1
Telefónica	1.1

Implementation: Top Ranked
Peer group: Consulting

Company	Score
NTT Data	9.1
Accenture	8.7
IBM	8.0
Cognizant	7.8
Capgemini (incl. Altran)	7.4
CGI	6.7
Wipro	6.7
Deloitte	5.8
Infosys	5.6
KPMG	4.8
EY	4.4
PwC	1.0
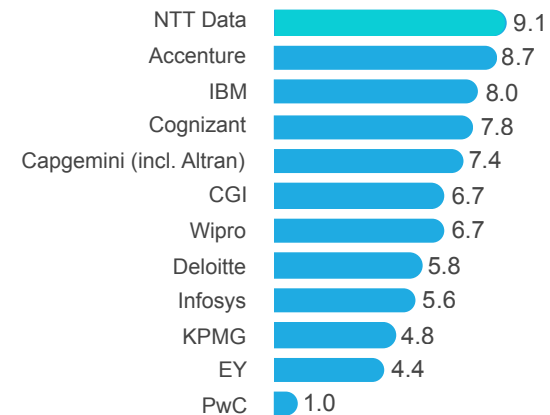
teknowlogy GROUP

The participants in this survey ranked NTT DATA not only top in IoT implementation skills (as mentioned in the previous section), but they ranked them also very high in overall implementation. Besides NTT DATA's already mentioned strong implementation skills, another advantage is the ability to leverage additional implementation know-how of its parent organization (telecom giant NTT, which has network coverage in 190 countries) to offer full-stack services, from advisory through infrastructure to applications and the network layer. Extended network capabilities in particular are key for IoT implementations.

SOLUTION DEVELOPMENT

"Solution Development" measures the development performance based on several IoT-specific use cases, such as security, machine learning, analytics, DevOps, AR/VR, connectivity, and device management.
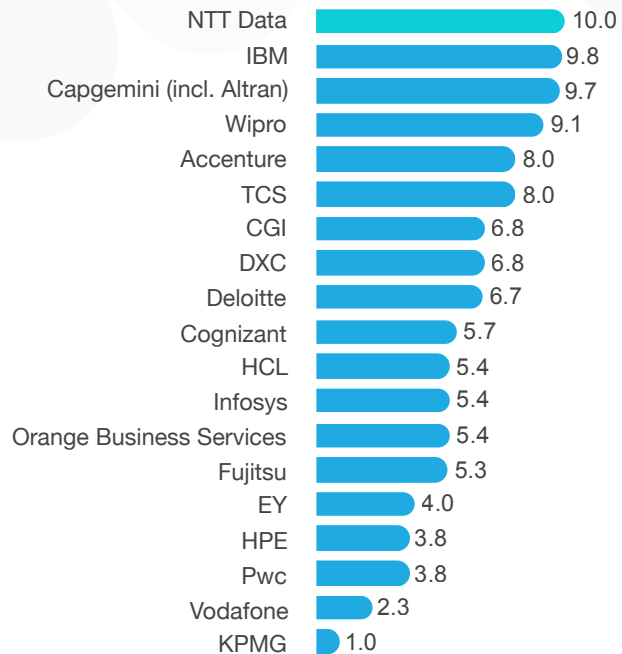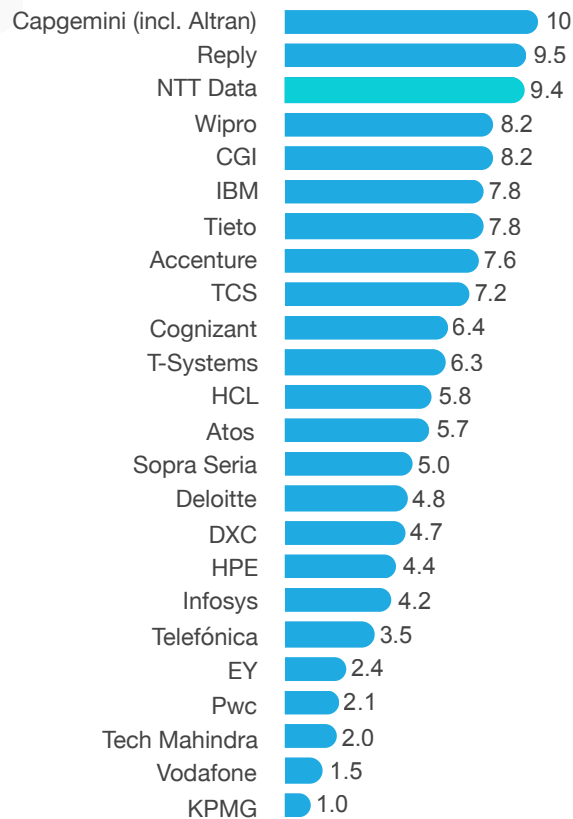
SOLUTION DEVELOPMENT
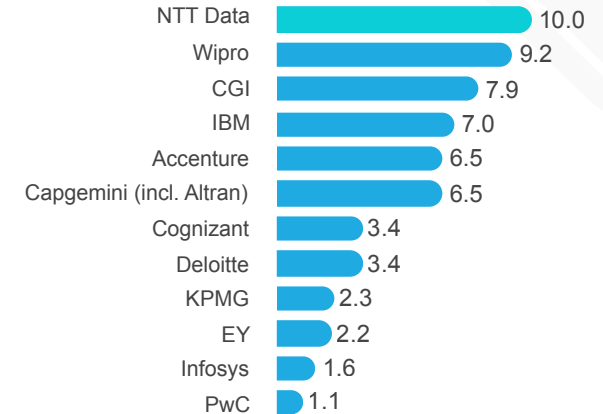
Solution Development: Top-ranked
Peer group: Americas

NTT Data	10.0
IBM	9.8
Capgemini (incl. Altran)	9.7
Wipro	9.1
Accenture	8.0
TCS	8.0
CGI	6.8
DXC	6.8
Deloitte	6.7
Cognizant	5.7
HCL	5.4
Infosys	5.4
Orange Business Services	5.4
Fujitsu	5.3
EY	4.0
HPE	3.8
Pwc	3.8
Vodafone	2.3
KPMG	1.0

Solution Development: Leader
Peer group: EMEA

Capgemini (incl. Altran)	10.
Reply	9.5
NTT Data	9.4
Wipro	8.2
CGI	8.2
IBM	7.8
Tieto	7.8
Accenture	7.6
TCS	7.2
Cognizant	6.4
T-Systems	6.3
HCL	5.8
Atos	5.7
Sopra Seria	5.0
Deloitte	4.8
DXC	4.7
HPE	4.4
Infosys	4.2
Telefónica	3.5
EY	2.4
Pwc	2.1
Tech Mahindra	2.0
Vodafone	1.5
KPMG	1.0

Solution Development: Top-ranked
Peer group: Consulting

NTT Data	10.0
Wipro	9.2
CGI	7.9
IBM	7.0
Accenture	6.5
Capgemini (incl. Altran)	6.5
Cognizant	3.4
Deloitte	3.4
KPMG	2.3
EY	2.2
Infosys	1.6
PwC	1.1

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According to the participants in this survey, NTT DATA is a global leader (Europe & Americas) in IoT solution development. This represents a strong proof point for its current IoT capabilities. However, this does not come as a big surprise. The company continues to ramp up its consulting and design spearhead, can draw upon the R&D engine of its parent organization (which supports areas such as the development of the Corevo artificial intelligence platform), and NTT DATA's project business is already strongly related to solution development (around 1/3 of its revenue today comes from application-related project services).
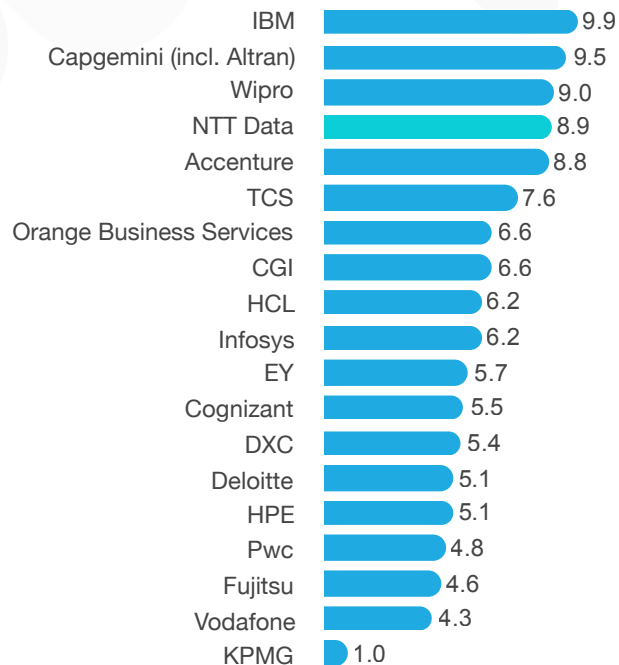
SOLUTION BUILDING

"Solution Building" reflects the overall satisfaction with the entire solution building portfolio, indicating which providers have proven that they know how to develop solutions that can deal with complex challenges.
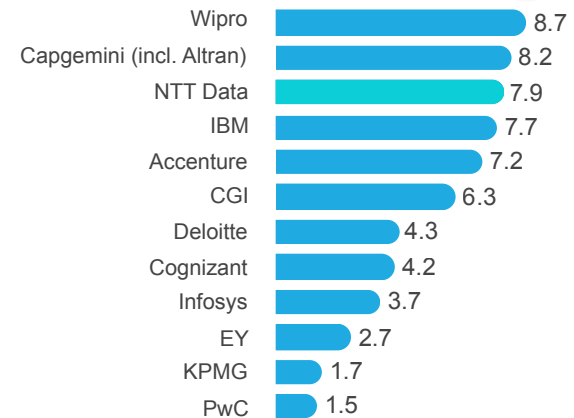
SOLUTION BUILDING

Solution Building: Leader
Peer group: Americas

Vendor	Score
IBM	9.9
Capgemini (incl. Altran)	9.5
Wipro	9.0
NTT Data	8.9
Accenture	8.8
TCS	7.6
Orange Business Services	6.6
CGI	6.6
HCL	6.2
Infosys	6.2
EY	5.7
Cognizant	5.5
DXC	5.4
Deloitte	5.1
HPE	5.1
Pwc	4.8
Fujitsu	4.6
Vodafone	4.3
KPMG	1.0

Solution Building: Leader
Peer group: Consulting

Vendor	Score
Wipro	8.7
Capgemini (incl. Altran)	8.2
NTT Data	7.9
IBM	7.7
Accenture	7.2
CGI	6.3
Deloitte	4.3
Cognizant	4.2
Infosys	3.7
EY	2.7
KPMG	1.7
PwC	1.5

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Based on the very strong results for NTT DATA in IoT solution development (as described in the previous section), we see that NTT DATA is also ranked among the top vendors in solution building (in the Americas and in the Consulting vendor peer group). The Solution Building KPI consists of the two sub-KPIs Solution Development and IoT Technology Expertise. This illustrates that NTT DATA can combine and provide its superior IoT solution development expertise together with solid IoT technology expertise.
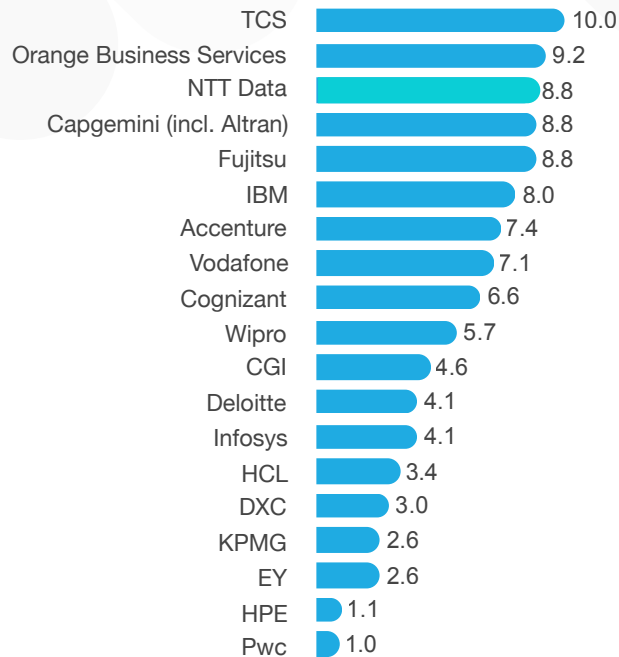
FLEXIBILITY

"Flexibility" refers to the perceived flexibility of a provider; for instance, it evaluates the handling of change requests to allow adjustments to new challenges.
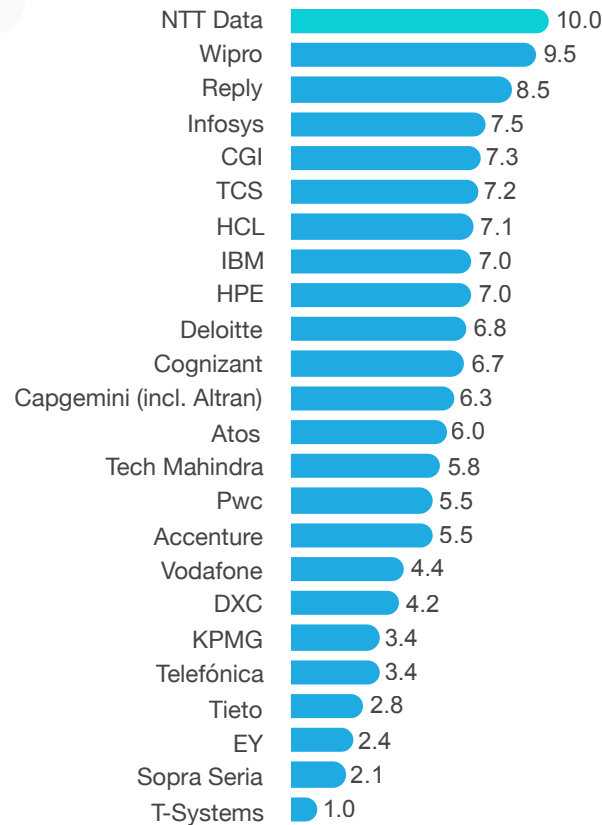
FLEXIBILITY

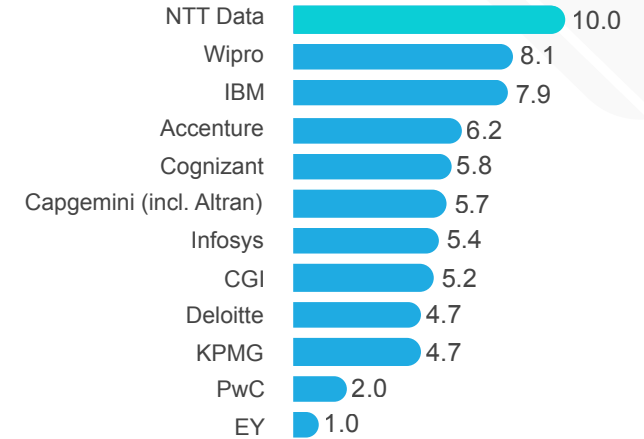## Flexibility: Leader
Peer group: Americas

TCS	10.0
Orange Business Services	9.2
NTT Data	8.8
Capgemini (incl. Altran)	8.8
Fujitsu	8.8
IBM	8.0
Accenture	7.4
Vodafone	7.1
Cognizant	6.6
Wipro	5.7
CGI	4.6
Deloitte	4.1
Infosys	4.1
HCL	3.4
DXC	3.0
KPMG	2.6
EY	2.6
HPE	1.1
Pwc	1.0

Flexibility: Top-Ranked
Peer group: EMEA

NTT Data	10.0
Wipro	9.5
Reply	8.5
Infosys	7.5
CGI	7.3
TCS	7.2
HCL	7.1
IBM	7.0
HPE	7.0
Deloitte	6.8
Cognizant	6.7
Capgemini (incl. Altran)	6.3
Atos	6.0
Tech Mahindra	5.8
Pwc	5.5
Accenture	5.5
Vodafone	4.4
DXC	4.2
KPMG	3.4
Telefónica	3.4
Tieto	2.8
EY	2.4
Sopra Seria	2.1
T-Systems	1.0

Flexibility: Top-Ranked
Peer group: Consulting

NTT Data	10.0
Wipro	8.1
IBM	7.9
Accenture	6.2
Cognizant	5.8
Capgemini (incl. Altran)	5.7
Infosys	5.4
CGI	5.2
Deloitte	4.7
KPMG	4.7
PwC	2.0
EY	1.0

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In this survey, NTT DATA is recognized as a global leader (top 1 in Europe, top 3 in the Americas, and top 1 in the Consulting vendor peer group) for its flexibility in IoT solution development. NTT DATA follows a vendor-agnostic approach and combines this with strong in-house software development capabilities for its global client base. This approach ensures high flexibility, allowing to instantly react to new customer requests. This is impressive, as flexibility is typically a challenging KPI for many IT service providers. Vendors are constantly forced to maximize their flexibility to satisfy clients, but keeping costs (efficiency) under control often leads to a bottleneck.
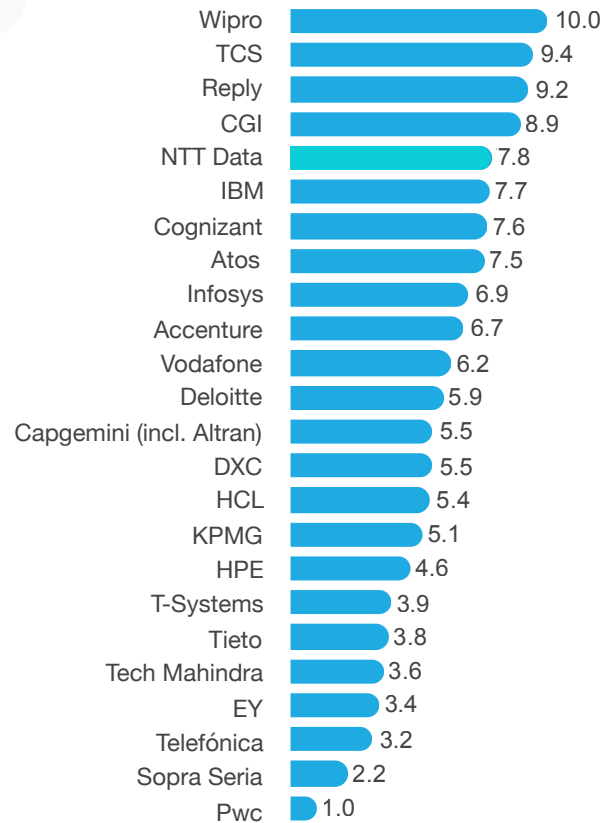
PROACTIVITY

"Proactivity" indicates how proactive a
provider is in driving a project forward
successfully.

PROACTIVITY

Proactivity: Leader
Peer group: EMEA

Company	Score
Wipro	10.0
TCS	9.4
Reply	9.2
CGI	8.9
NTT Data	7.8
IBM	7.7
Cognizant	7.6
Atos	7.5
Infosys	6.9
Accenture	6.7
Vodafone	6.2
Deloitte	5.9
Capgemini (incl. Altran)	5.5
DXC	5.5
HCL	5.4
KPMG	5.1
HPE	4.6
T-Systems	3.9
Tieto	3.8
Tech Mahindra	3.6
EY	3.4
Telefónica	3.2
Sopra Seria	2.2
Pwc	1.0

teknowlogy GROUP

According to the participants in this survey, NTT DATA is a highly proactive IoT service provider in Europe. In fact, NTT DATA is perceived to be much more proactive in its client interactions than most of its peers across Europe. In addition, NTT DATA also is very proactive in developing and leveraging new technologies for its clients. The company plans to invest further in the coming years, especially with the aim of developing more flexible and agile solutions. This would allow them to become even more proactive in the future.
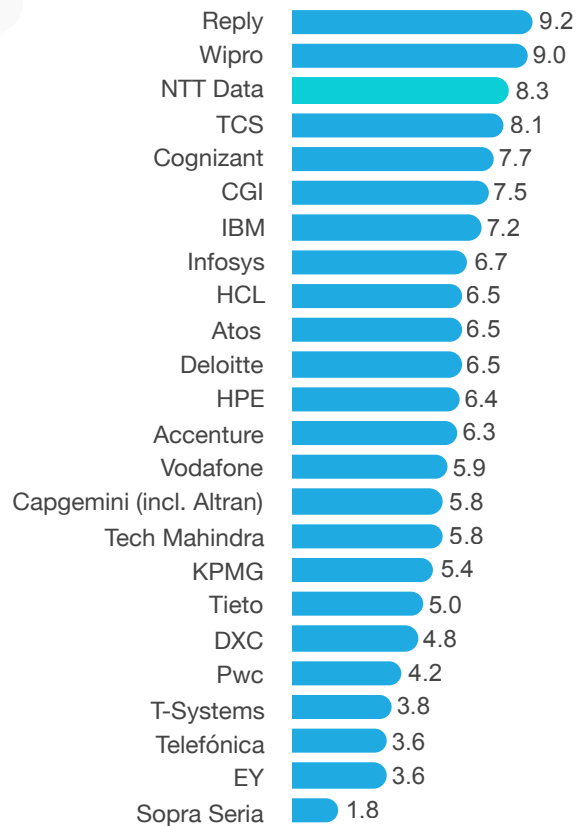
COLLABORATION

"Collaboration" evaluates the overall performance related to soft skills in communication and project handling.

COLLABORATION

Colaboration: Leader
Peer group: EMEA

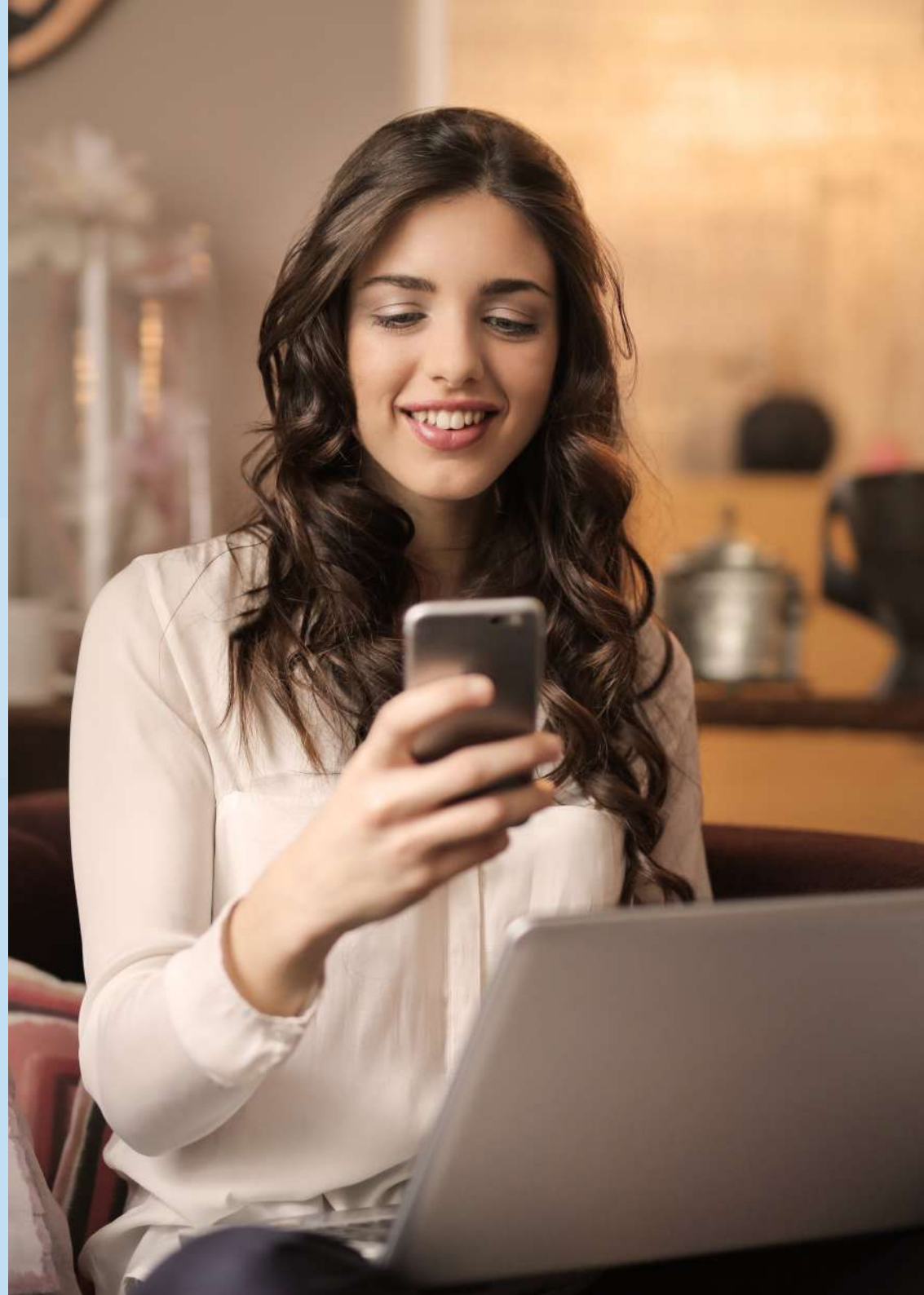| Company	Score
Reply	9.2
Wipro	9.0
NTT Data	8.3
TCS	8.1
Cognizant	7.7
CGI	7.5
IBM	7.2
Infosys	6.7
HCL	6.5
Atos	6.5
Deloitte	6.5
HPE	6.4
Accenture	6.3
Vodafone	5.9
Capgemini (incl. Altran)	5.8
Tech Mahindra	5.8
KPMG	5.4
Tieto	5.0
DXC	4.8
Pwc	4.2
T-Systems	3.8
Telefónica	3.6
EY	3.6
Sopra Seria	1.8

teknowlogy GROUP

Based on its global presence, NTT DATA continues to drive a more collaborative approach with clients around digital transformation, including IoT. And the feedback from clients in Europe on this KPI is already very positive, according to this survey. In the UK, for example, NTT DATA recently opened an innovation center as part of a £100m investment in the country, and it is increasingly engaging with C-suite-level stakeholders to drive collaborative engagements. It plans to extend the collaborative approach more and more into new topics such as artificial intelligence, IoT, blockchain, and virtual and augmented reality.
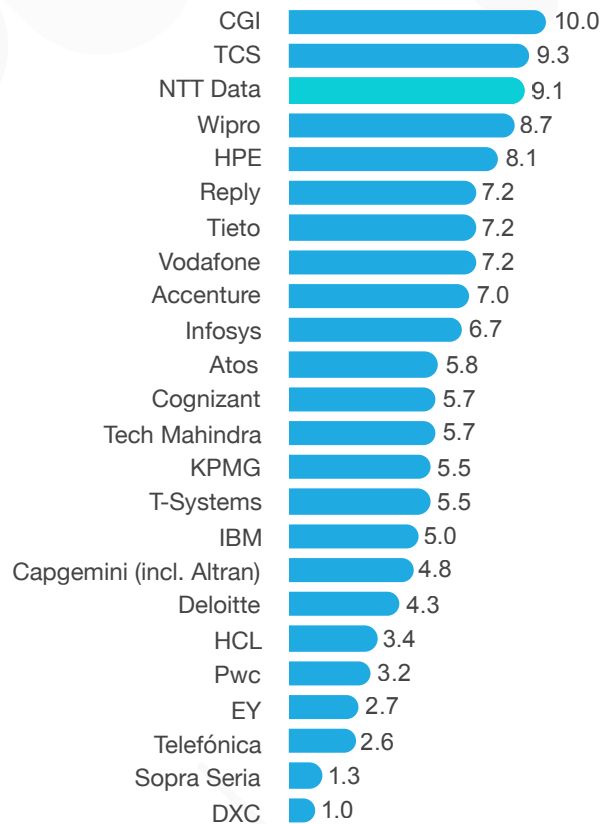
RECOMMENDATION

"Recommendation" indicates the share of users that say they would recommend a provider to others.
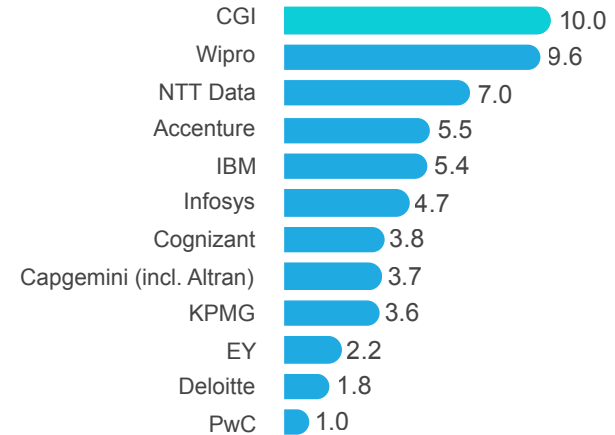
RECOMMENDATION

Recommendation: Leader
Peer group: EMEA

Company	Score
CGI	10.0
TCS	9.3
NTT Data	9.1
Wipro	8.7
HPE	8.1
Reply	7.2
Tieto	7.2
Vodafone	7.2
Accenture	7.0
Infosys	6.7
Atos	5.8
Cognizant	5.7
Tech Mahindra	5.7
KPMG	5.5
T-Systems	5.5
IBM	5.0
Capgemini (incl. Altran)	4.8
Deloitte	4.3
HCL	3.4
Pwc	3.2
EY	2.7
Telefónica	2.6
Sopra Seria	1.3
DXC	1.0

Recommendation: Leader
Peer group: Consulting

Company	Score
CGI	10.0
Wipro	9.6
NTT Data	7.0
Accenture	5.5
IBM	5.4
Infosys	4.7
Cognizant	3.8
Capgemini (incl. Altran)	3.7
KPMG	3.6
EY	2.2
Deloitte	1.8
PwC	1.0

teknowlogy GROUP

In this survey, NTT DATA achieved very strong ratings in terms of recommendation rate (top 3 in Europe and top 3 in the Consulting vendor peer group). Given this strong recommendation rate, it is no surprise that the company has been able to further grow its business across Europe. This is underlined by significant wins in both the private (Daimler) and public sectors (HM Treasury), which have given it a strong platform in the UK, Germany, Italy, and Spain in particular. NTT DATA is doing a good job of acquiring, integrating, and leveraging well-established companies such as itelligence and Everis in order to provide superior value to its European client base.
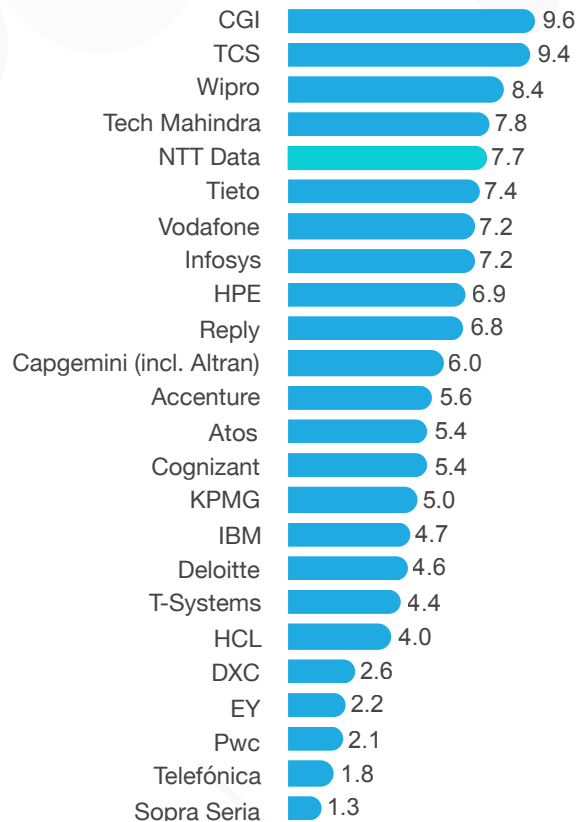
CUSTOMER SATISFACTION

"Customer Satisfaction" measures overall customer satisfaction based on the satisfaction with the pricing model as well as the likelihood of a recommendation.
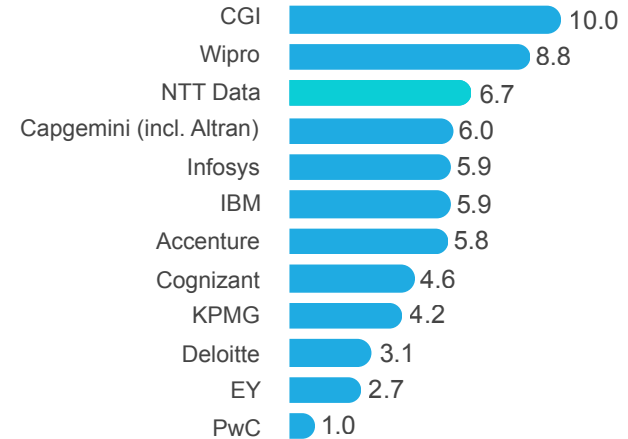
CUSTOMER SATISFACTION

Customer Satisfaction: Leader
Peer group: EMEA

Company	Score
CGI	9.6
TCS	9.4
Wipro	8.4
Tech Mahindra	7.8
NTT Data	7.7
Tieto	7.4
Vodafone	7.2
Infosys	7.2
HPE	6.9
Reply	6.8
Capgemini (incl. Altran)	6.0
Accenture	5.6
Atos	5.4
Cognizant	5.4
KPMG	5.0
IBM	4.7
Deloitte	4.6
T-Systems	4.4
HCL	4.0
DXC	2.6
EY	2.2
Pwc	2.1
Telefónica	1.8
Sopra Seria	1.3

Customer Satisfaction: Leader
Peer group: Consulting

Company	Score
CGI	10.0
Wipro	8.8
NTT Data	6.7
Capgemini (incl. Altran)	6.0
Infosys	5.9
IBM	5.9
Accenture	5.8
Cognizant	4.6
KPMG	4.2
Deloitte	3.1
EY	2.7
PwC	1.0

teknowlogy GROUP

Customer satisfaction is a core KPI when it comes to extending one's footprint within an account. NTT DATA combines a strong recommendation rate (as described in the previous section) with good price-to-value scores, thus achieving strong overall results in customer satisfaction. It is important to understand that NTT DATA sees customer satisfaction as a strategic topic and does everything to optimize it. Why? Because NTT DATA aims to expand its presence within existing clients step by step. This would be impossible without a high level of customer satisfaction. Therefore clients can trust that NTT DATA is always willing to deliver high quality.
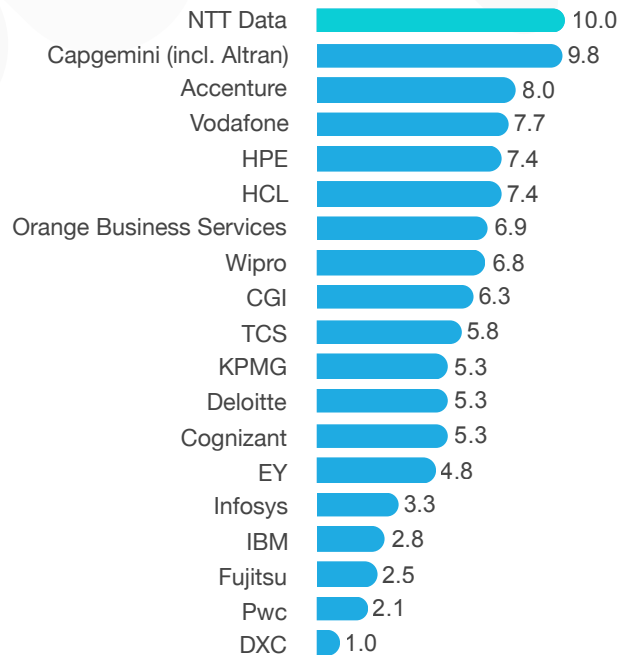
EFFICIENCY

"Efficiency" refers to the extent to which a provider manages to stay within or even under budget.
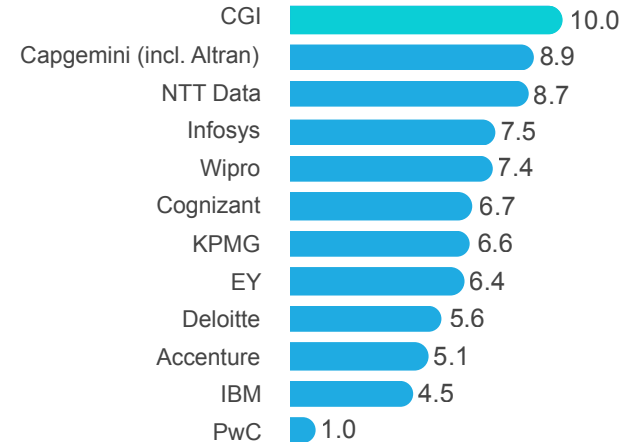
EFFICIENCY

Efficiency: Top-Ranked
Peer group: Americas

Company	Score
NTT Data	10.0
Capgemini (incl. Altran)	9.8
Accenture	8.0
Vodafone	7.7
HPE	7.4
HCL	7.4
Orange Business Services	6.9
Wipro	6.8
CGI	6.3
TCS	5.8
KPMG	5.3
Deloitte	5.3
Cognizant	5.3
EY	4.8
Infosys	3.3
IBM	2.8
Fujitsu	2.5
Pwc	2.1
DXC	1.0

Efficiency: Leader
Peer group: Consulting

Company	Score
CGI	10.0
Capgemini (incl. Altran)	8.9
NTT Data	8.7
Infosys	7.5
Wipro	7.4
Cognizant	6.7
KPMG	6.6
EY	6.4
Deloitte	5.6
Accenture	5.1
IBM	4.5
PwC	1.0

teknowlogy GROUP

In terms of IoT, connected vehicles is one of NTT DATA's focus areas. A key strength in this context is the company's standardized software portfolio, which can be adapted to customers' individual needs. As this example underlines, NTT DATA provides a good balance between standardized software and individual services on top. This is not only the case for connected vehicles, it is also true in the broader IoT context. This approach ensures a high level of flexibility and customer satisfaction while also maintaining a high level of efficiency. According to customer feedback, NTT DATA is doing a good job of balancing these factors.
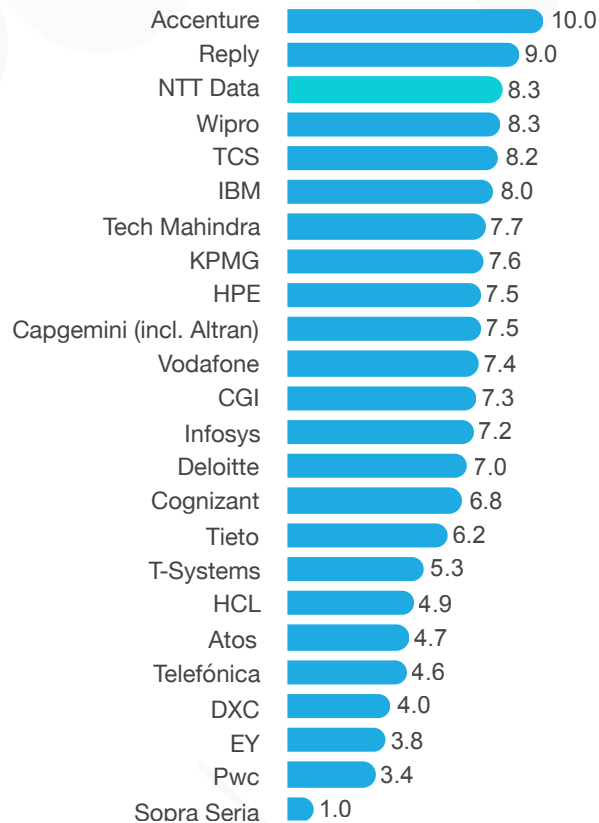
EFFECTIVENESS

"Effectiveness" is based on how well a provider supports customers in meeting their business objectives.
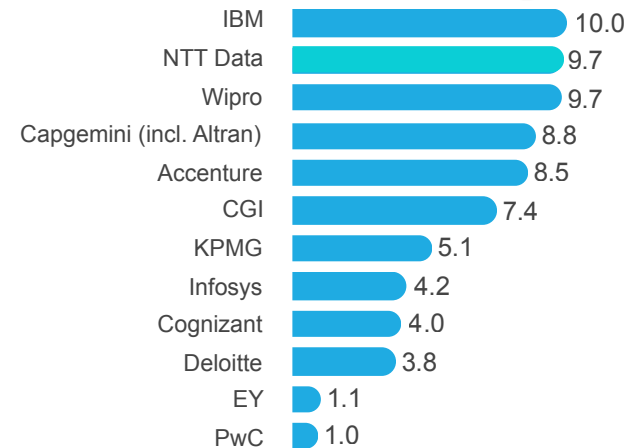
EFFECTIVENESS

Effectiveness: Leader
Peer group: EMEA

Accenture	10.0
Reply	9.0
NTT Data	8.3
Wipro	8.3
TCS	8.2
IBM	8.0
Tech Mahindra	7.7
KPMG	7.6
HPE	7.5
Capgemini (incl. Altran)	7.5
Vodafone	7.4
CGI	7.3
Infosys	7.2
Deloitte	7.0
Cognizant	6.8
Tieto	6.2
T-Systems	5.3
HCL	4.9
Atos	4.7
Telefónica	4.6
DXC	4.0
EY	3.8
Pwc	3.4
Sopra Seria	1.0

Effectiveness: Leader
Peer group: Consulting

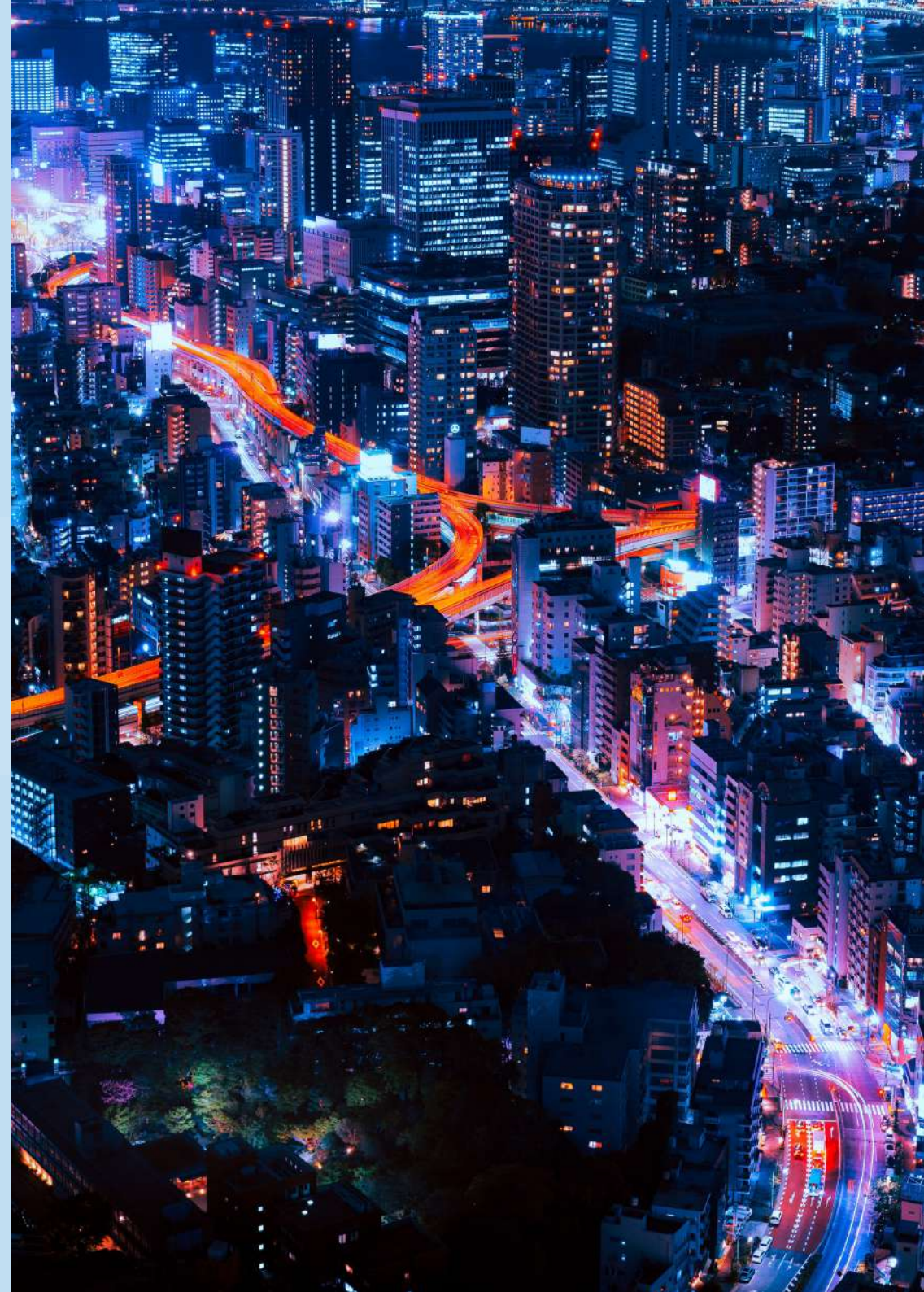|	
IBM	10.0
NTT Data	9.7
Wipro	9.7
Capgemini (incl. Altran)	8.8
Accenture	8.5
CGI	7.4
KPMG	5.1
Infosys	4.2
Cognizant	4.0
Deloitte	3.8
EY	1.1
PwC	1.0

teknowlogy GROUP

In the IoT survey, NTT DATA achieves very good ratings for effectiveness (top 3 in EMEA and top 2 in the Consulting peer group). This makes NTT DATA one of the leading vendors when it comes to meeting clients' specific business objectives. As previously mentioned, the recently opened innovation center in the UK is not only focused on engaging with C-suite-level stakeholders around collaborative engagements, but it is also a proof point for NTT DATA's increasing focus on delivering business outcomes in a more direct and local manner.

BUSINESS VALUE

"Business Value" refers to the overall value of a provider in terms of how effectively and efficiently business objectives are met.
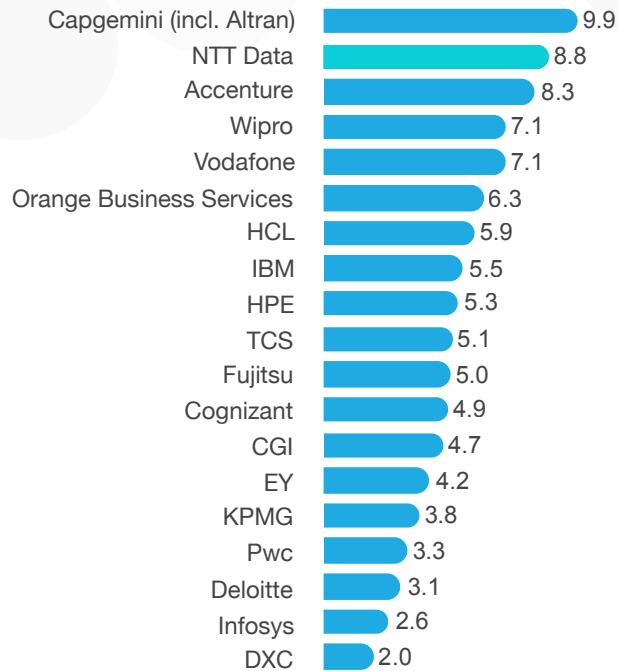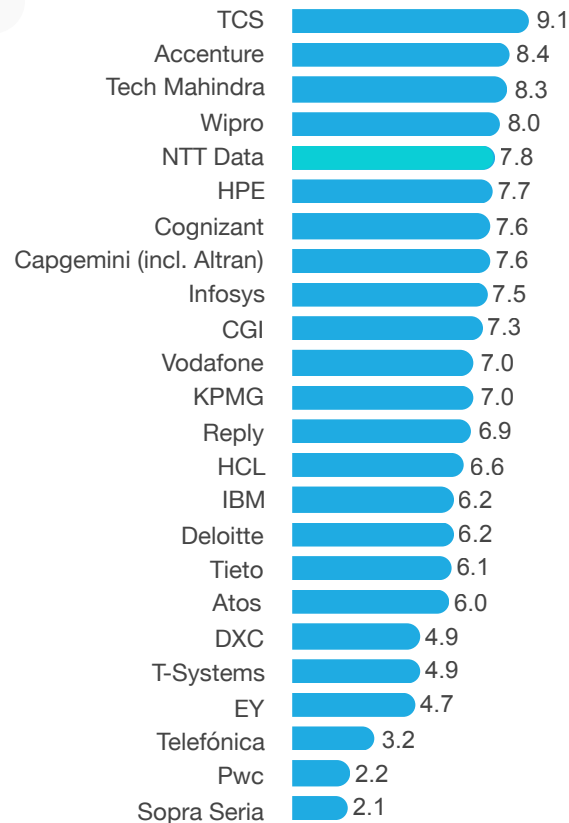
BUSINESS VALUE

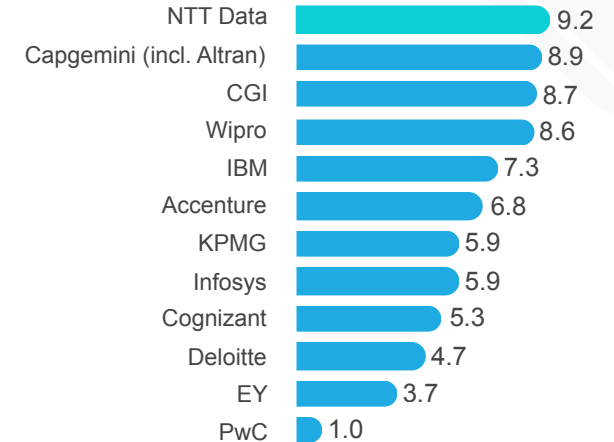## Business Value: Leader
Peer group: Americas

Capgemini (incl. Altran)	9.9
NTT Data	8.8
Accenture	8.3
Wipro	7.1
Vodafone	7.1
Orange Business Services	6.3
HCL	5.9
IBM	5.5
HPE	5.3
TCS	5.1
Fujitsu	5.0
Cognizant	4.9
CGI	4.7
EY	4.2
KPMG	3.8
Pwc	3.3
Deloitte	3.1
Infosys	2.6
DXC	2.0

Business Value: Leader
Peer group: EMEA

TCS	9.1
Accenture	8.4
Tech Mahindra	8.3
Wipro	8.0
NTT Data	7.8
HPE	7.7
Cognizant	7.6
Capgemini (incl. Altran)	7.6
Infosys	7.5
CGI	7.3
Vodafone	7.0
KPMG	7.0
Reply	6.9
HCL	6.6
IBM	6.2
Deloitte	6.2
Tieto	6.1
Atos	6.0
DXC	4.9
T-Systems	4.9
EY	4.7
Telefónica	3.2
Pwc	2.2
Sopra Seria	2.1

Business Value: Top-Ranked
Peer group: Consulting

|	
NTT Data	9.2
Capgemini (incl. Altran)	8.9
CGI	8.7
Wipro	8.6
IBM	7.3
Accenture	6.8
KPMG	5.9
Infosys	5.9
Cognizant	5.3
Deloitte	4.7
EY	3.7
PwC	1.0

teknowlogy GROUP

The participants in this survey gave NTT DATA strong ratings for business value (top 2 in the Americas, top 5 in EMEA, and top 1 in the Consulting peer group). This means that NTT DATA meets its clients' individual business objectives in a highly efficient way. They avoid overengineering solutions by combining standardized software with individual add-on services. These customer-specific end-to-end solutions, plus in-depth expertise and experience in Europe, above all in the German automotive sector (where they work on IoT projects with all the large OEMs), make NTT DATA a key vendor for IoT C&SI services in Europe and across the world.
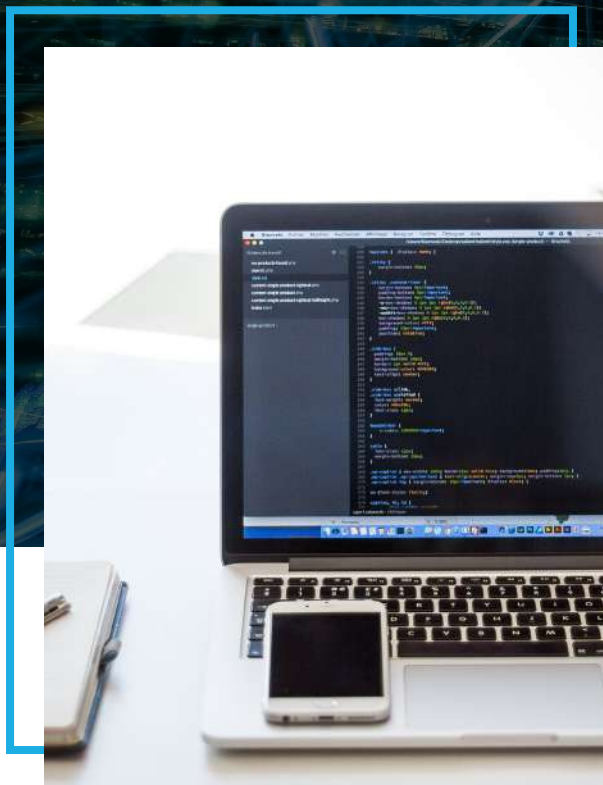
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