



Sustainability & CSR | Europe | 2023

Leaders in Sustainability-related IT Consulting & Services in Europe

SITSI® | Vendor Analysis | PAC INNOVATION RADAR

Europe
Germany
UK

Sustainability of IT

- Focus on Applications
- Focus on Infrastructures
- Focus on the Banking Sector

Sustainability through IT

- Sustainability Reporting
- Sustainability through the IoT (Internet of Things)

- Consolidated -

Positioning of

NTT DATA

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DOCUMENT INFORMATION

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Related reports: This document is part of a series of eleven PAC INNOVATION RADAR reports.

INTRODUCTION

Environmental sustainability as part of ESG

As part of the ubiquitous ESG (environmental, social and governance) regulations and strategies, environmental sustainability is one of the most dynamic topics in the IT services market and an increasingly important selection criterion when choosing an IT provider.

Future regulations are putting businesses under pressure. Recent examples have included EU regulations, such as the Green Deal, including new standards (taxonomy) or country-specific regulations, such as the German Supply Chain Due Diligence Act (Lieferkettensorgfaltspflichtengesetz, LkSG).

Likewise, nearly all leading IT service providers have not only made efforts to address sustainability internally by, for example, reducing their own carbon footprint but also in their day-to-day business.

Sustainability-related IT consulting & services

Moreover, more specific approaches have been introduced in the market to support customers in defining, monitoring and achieving their sustainability goals. Often, sustainability-related consulting & services are close to the core competencies of IT companies, such as data management & analytics, reporting, utilization & efficiency optimization, simulation, digital transformation, cloud migration, hybrid work, etc.

In this context, market analysis and consulting company PAC has analyzed the IT service provider landscape in Europe and evaluated

the leading providers' approaches, offerings, strategies and references in its PAC INNOVATION RADAR series on "Sustainability-Related IT Consulting & Services in Europe". A total of 26 IT service providers considered relevant for the industry have been analyzed for their specific strengths and weaknesses based on numerous defined criteria (s. page 36).

The results have been published in eleven PAC RADAR reports, each focusing on different aspects of a provider's service value chain (in accordance with customer needs and requirements) and providing an overview of the key providers' positioning.

As a benchmarking tool comparing the most relevant providers, the following RADAR analyses have been conducted to accompany customers on their sustainability journey (for more details, see page 30):

- Sustainability-related IT Consulting & Services
- Sustainability of IT
- Sustainability of IT – Focus on Applications
- Sustainability of IT – Focus on Infrastructures
- Sustainability through IT
- Sustainability Reporting
- Sustainability of IT – Focus on the Banking Sector
- Sustainability through the Internet of Things (IoT)
- Sustainability-related IT Consulting & Services in Germany 2023
- Sustainability-related IT Consulting & Services in the UK 2023
- Sustainability-related IT Consulting & Services in France 2023

KEY FINDINGS

On the demand side

Although the topic of **sustainability** has made it to the highest management levels in all industries (CEO, CFO, CIO, CDO, etc.), it is still **largely in its infancy for the companies considered in this analysis**. Consequently, developments are progressing at a correspondingly **rapid pace**.

On the customer side, there are various **drivers** for investing in IT in order to achieve sustainability. Investment strategies range from implementing the most necessary reporting requirements (**regulation-driven**) to comprehensive business transformation aimed at positioning sustainability as a competitive advantage (**value-driven**).

The **starting point** for sustainability-related projects can be IT infrastructures or application landscapes (sustainability of IT), but also comprehensive business transformation strategies (sustainability through IT). These include **ESG reporting**, but also sustainability approaches that make use of the Internet of Things (**IoT**), e.g., in areas such as smart buildings, smart mobility or smart city.

Given the diverse range of data sources and possible levers along the value chain of large companies, the **complexity** to be managed is enormous. In many cases, companies struggle to aggregate sustainability-related data from various sources and to disclose it to **different kinds of stakeholder in an automated way**.

Highly heterogeneous maturity levels on the client side – Large enterprises are clearly first movers (establishment of data analytics

and reporting tools; turning costs into value; automation) vs. SMEs (often at the beginning; basic consulting on targets and strategies regarding sustainability, etc.)

All industry sectors are impacted – From financial services (e.g., Sustainable Finance, Green IT), to manufacturing (production, supply chains, IoT), to transport (scope 1 [e.g., aviation]; complex supply chains), to public sector & utilities (e.g., supporting public initiatives; waste, water), etc. At banks for example, the IT plays a particularly important part of the value chain and thus represents a major lever for emissions savings.

Therefore, the **demand for external support is correspondingly high** and is expected to be increasing in the future. The maturity of this support, however, is just **as heterogeneous as the strategies on the customer side**.

On the provider side

At the moment, demand determines a provider's offering (and not the other way around). Offerings often arise from a **co-creation process with the customer**, who approaches the provider with, for example, a particular need.

Thus, the **spectrum of providers** analyzed is correspondingly **heterogeneous**. Their positioning, portfolios, investments, tools, and strategies show in part considerable differences in maturity – and often reflect the maturity of their addressed clientele. They range from globally active service providers with very comprehensive sustainability approaches in all the areas examined to national providers with sometimes still extremely specific competencies and focal points. However, they all agree

that the topic is becoming an increasingly critical competitive factor.

The topic’s entrenchment within the organizations is heterogeneous.

- There are both dedicated business units and virtual teams. From PAC's point of view, the most promising approach is to have the topic both driven forward by a dedicated unit and implemented in a decentralized way, meaning in all areas of the IT service company.
- Typically, sustainability projects are staffed not only with mere sustainability experts, but with mixed teams comprising data scientists, cloud experts, consultants, developers, etc. Interdisciplinary teams are important to drive innovative topics, such as that of sustainability-related IT services, and to develop the business field in this direction.

The providers’ portfolios are characterized by **different maturity levels:**

- From end-to-end services (consulting to implementation) to niche offerings (e.g., focus on specific sectors and industries, reporting-only).
- We found out that dedicated offerings (e.g., sustainability reporting) were usually more advanced than the embedded ones (sustainability anchored in traditional business [SW development, infrastructure optimization, etc.]). This could be driven by regulations (e.g., the EU Corporate Sustainability Reporting Directive, CSRD).
- Consulting-led vendors with C-level access are usually most advanced in their maturity levels indicating that this development depends on the overall business focus, posi-

tioning and client access (e.g., IT-only, business).

The level of commitment and investment varies among the evaluated vendors:

- All vendors have committed themselves to internal measures, KPIs with respect to net-zero targets, etc.;
- Most vendors invest in sustainability-related assets (IP, tools, solutions, methods, etc.);
- Some vendors invest in their own IP and platforms (partly add-on solutions to major platforms like ServiceNow or SAP);
- The ability to establish an (interdisciplinary) ecosystem is key to building a sustainability-related offering. We see most vendors partnering with start-ups/specialists and established providers (e.g., platform providers like Microsoft, SAP, Salesforce, ServiceNow, AWS, Google);
- There are targeted M&A activities, however they are pursued selectively.

Projects and references range **from first selective projects to huge business transformation engagements** (but still very few lighthouse deals) – **usually starting within the existing customer base.** We have seen many case studies in the following areas:

- Sustainability-related analytics & reporting,
- Circular economy,
- IoT (smart buildings, smart city, smart mobility, industrial IoT, etc.),
- Sustainable finance,
- Supply chain optimization,
- Hybrid work, digital collaboration, digital twin/simulation, etc.

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023"

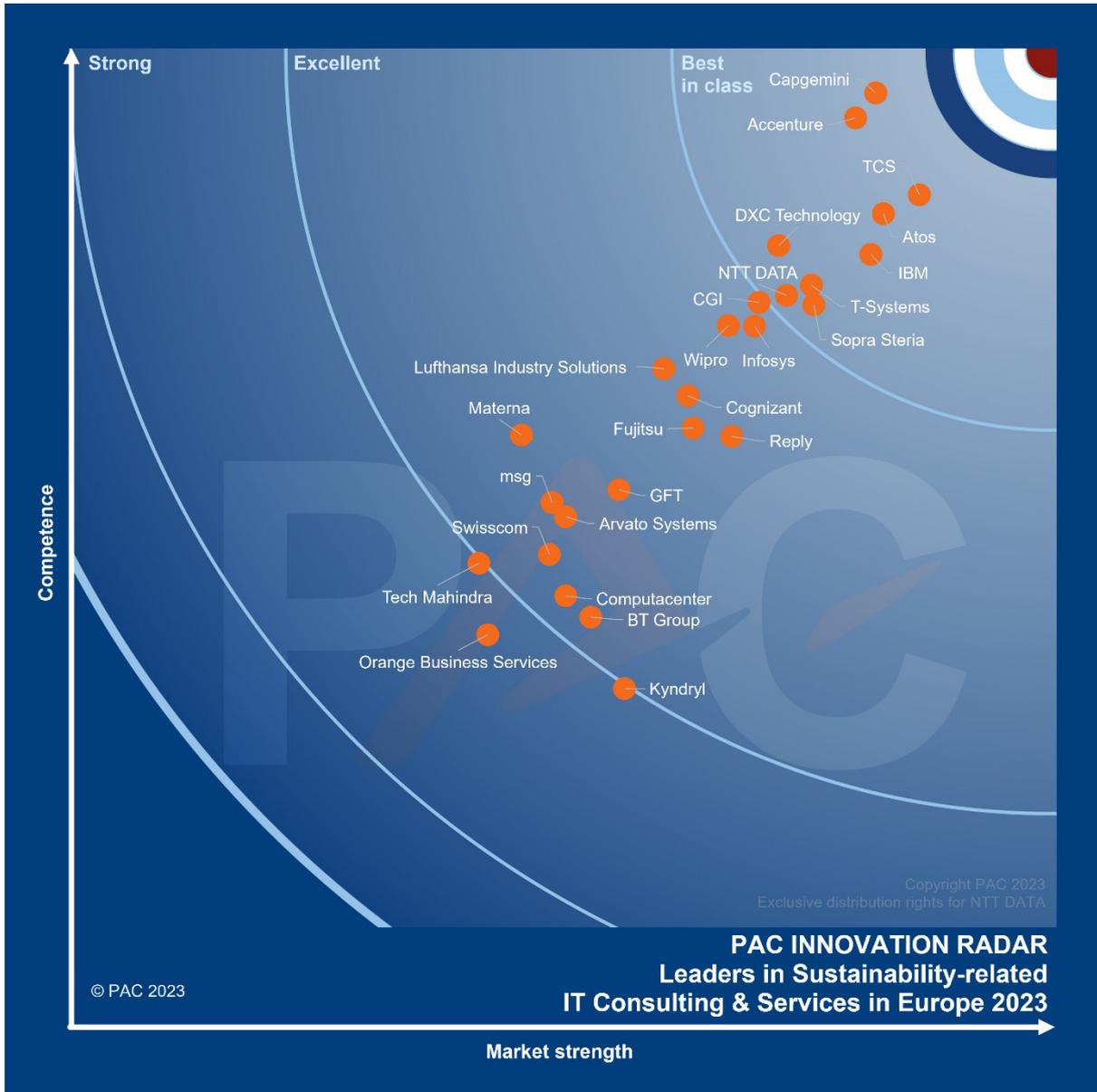


Fig. 1: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023”

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.30 | 2.00 |
| Competence | 2.25 | 1.92 |
| Total score | 2.26 | 1.94 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)
- General strength on the EMEA market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN GERMANY 2023"

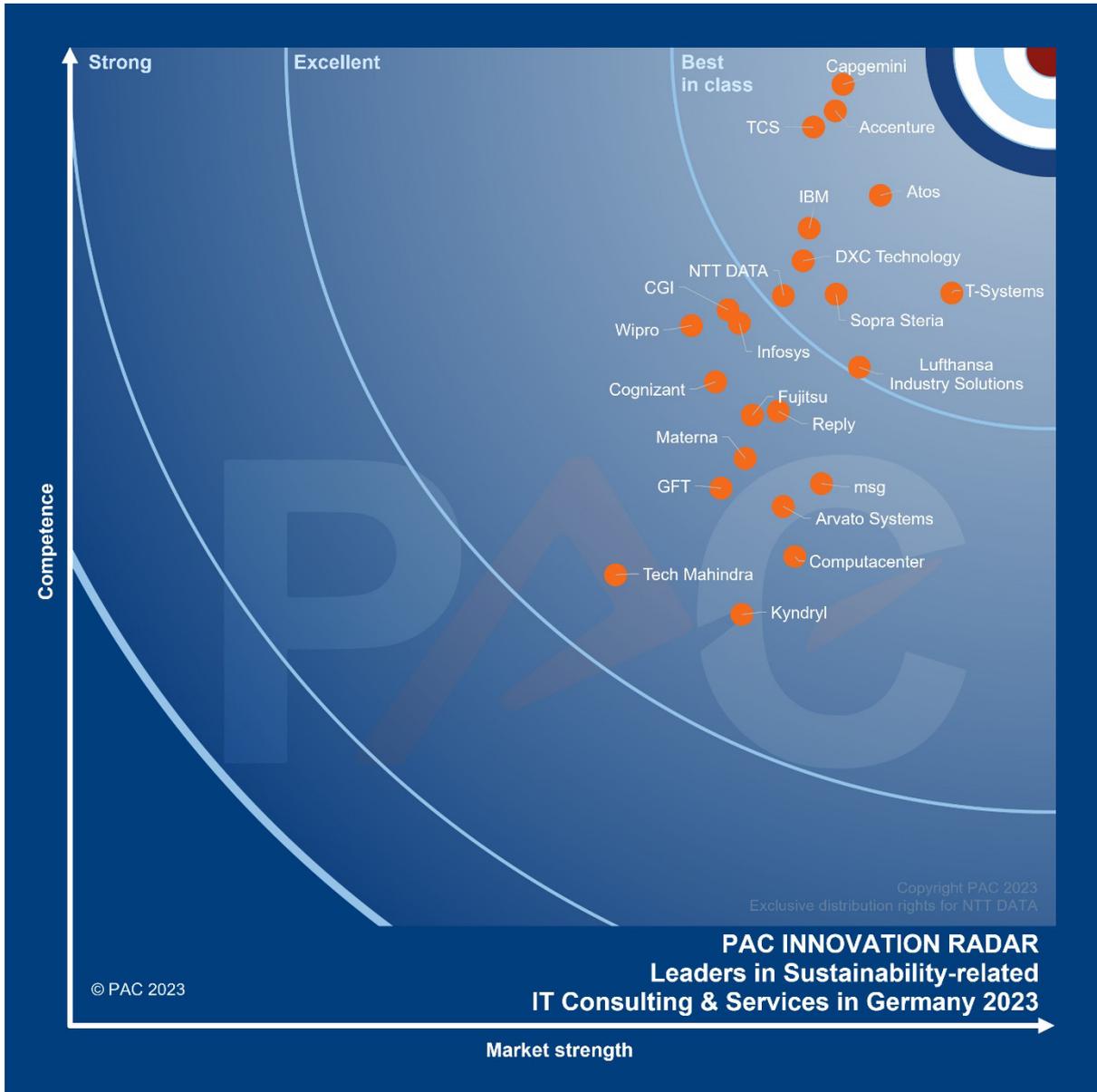


Fig. 2: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Germany 2023"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Germany 2023”

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 1.99 | 2.00 |
| Competence | 2.14 | 1.92 |
| Total score | 2.07 | 1.96 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)
- n/a

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN THE UK 2023"

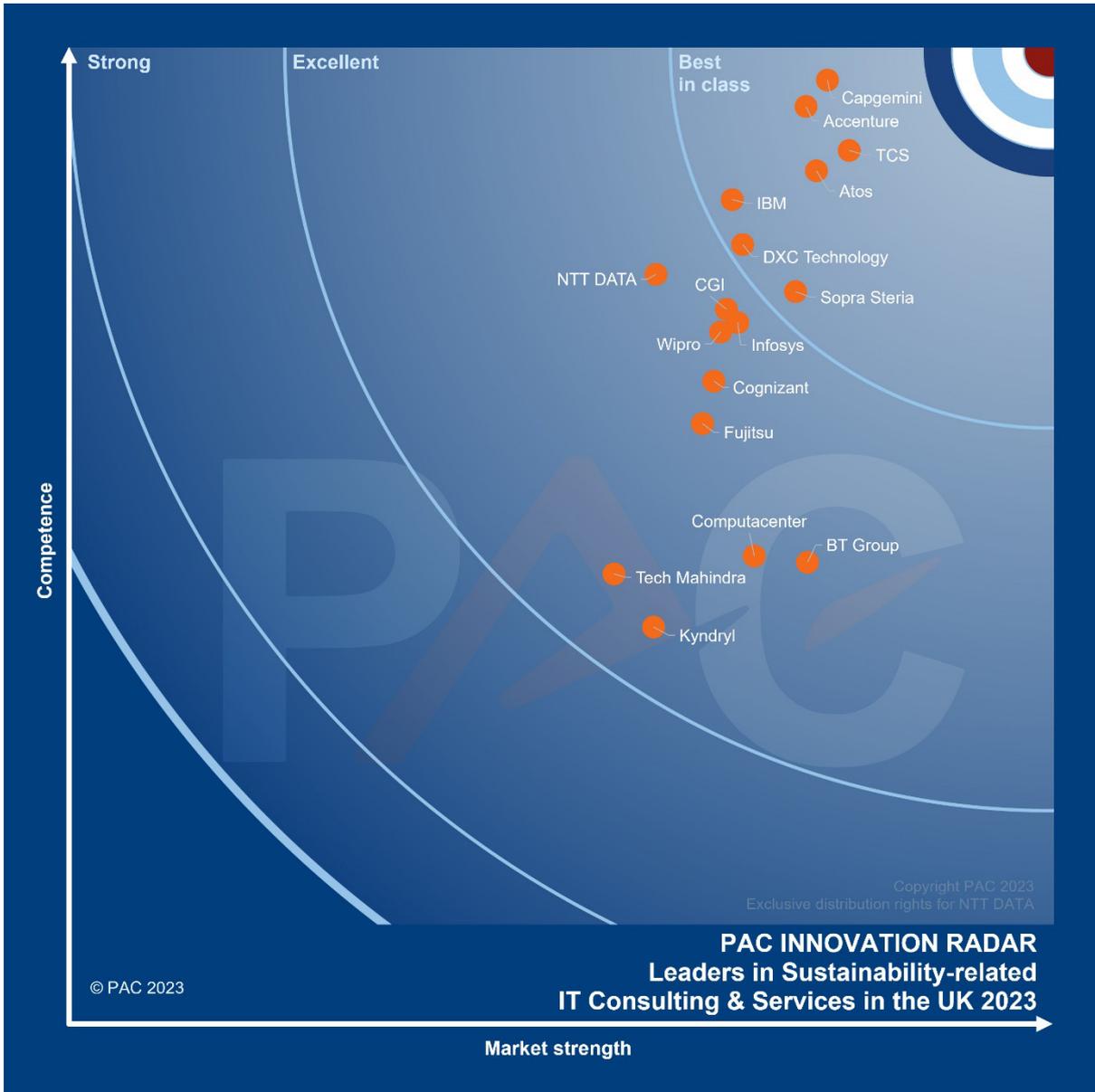


Fig. 3: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in the UK 2023"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in the UK 2023”

Excellent

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.15 | 2.61 |
| Competence | 2.07 | 1.92 |
| Total score | 2.11 | 2.25 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the UK market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY OF IT"

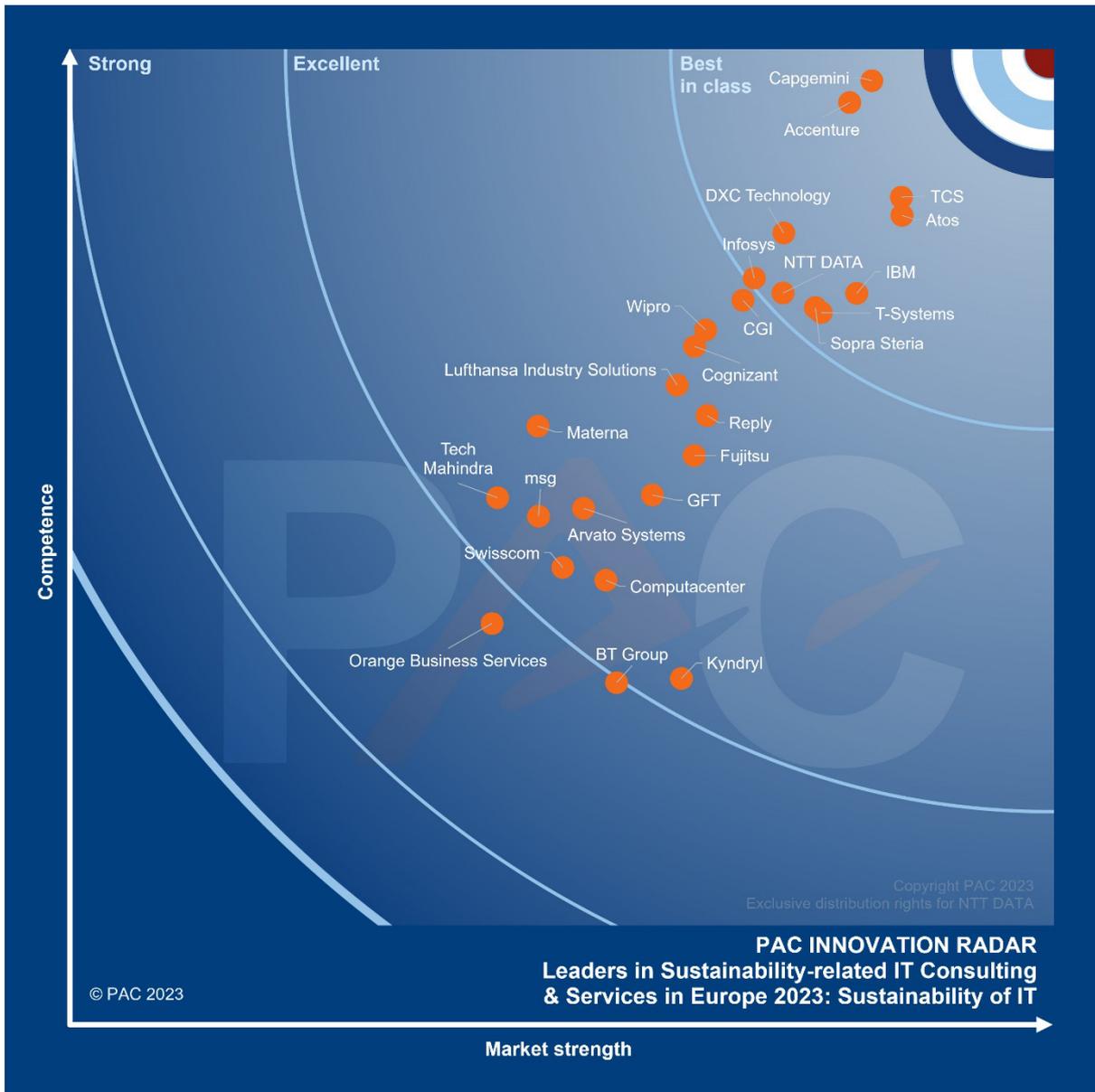


Fig. 4: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT”

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.28 | 2.01 |
| Competence | 2.23 | 1.91 |
| Total score | 2.24 | 1.93 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY OF IT – FOCUS ON APPLICATIONS”

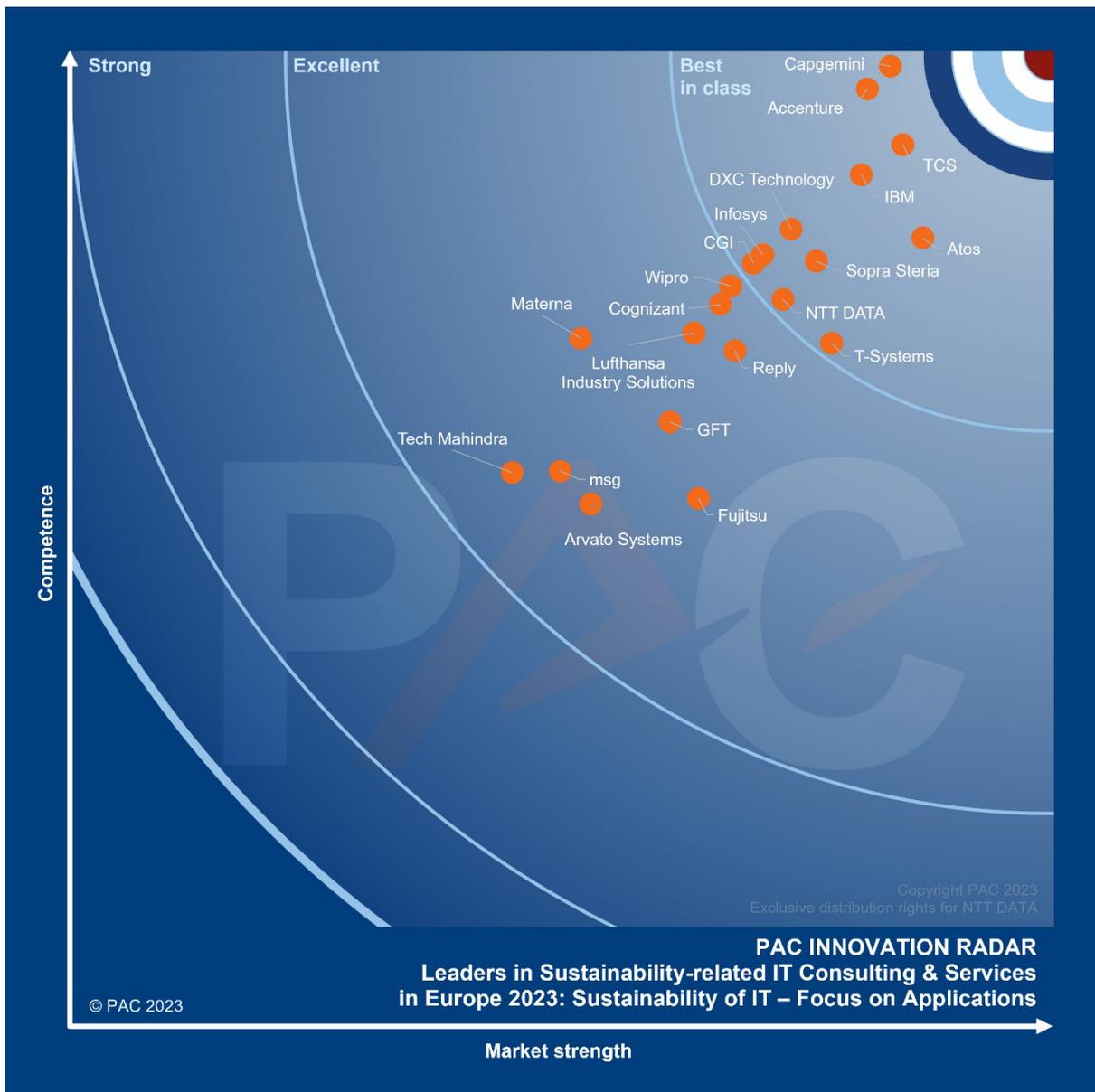


Fig. 5: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Applications”

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023”:
Sustainability of IT – Focus on Applications

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.19 | 2.01 |
| Competence | 1.96 | 1.93 |
| Total score | 2.01 | 1.95 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY OF IT – FOCUS ON INFRASTRUCTURES”

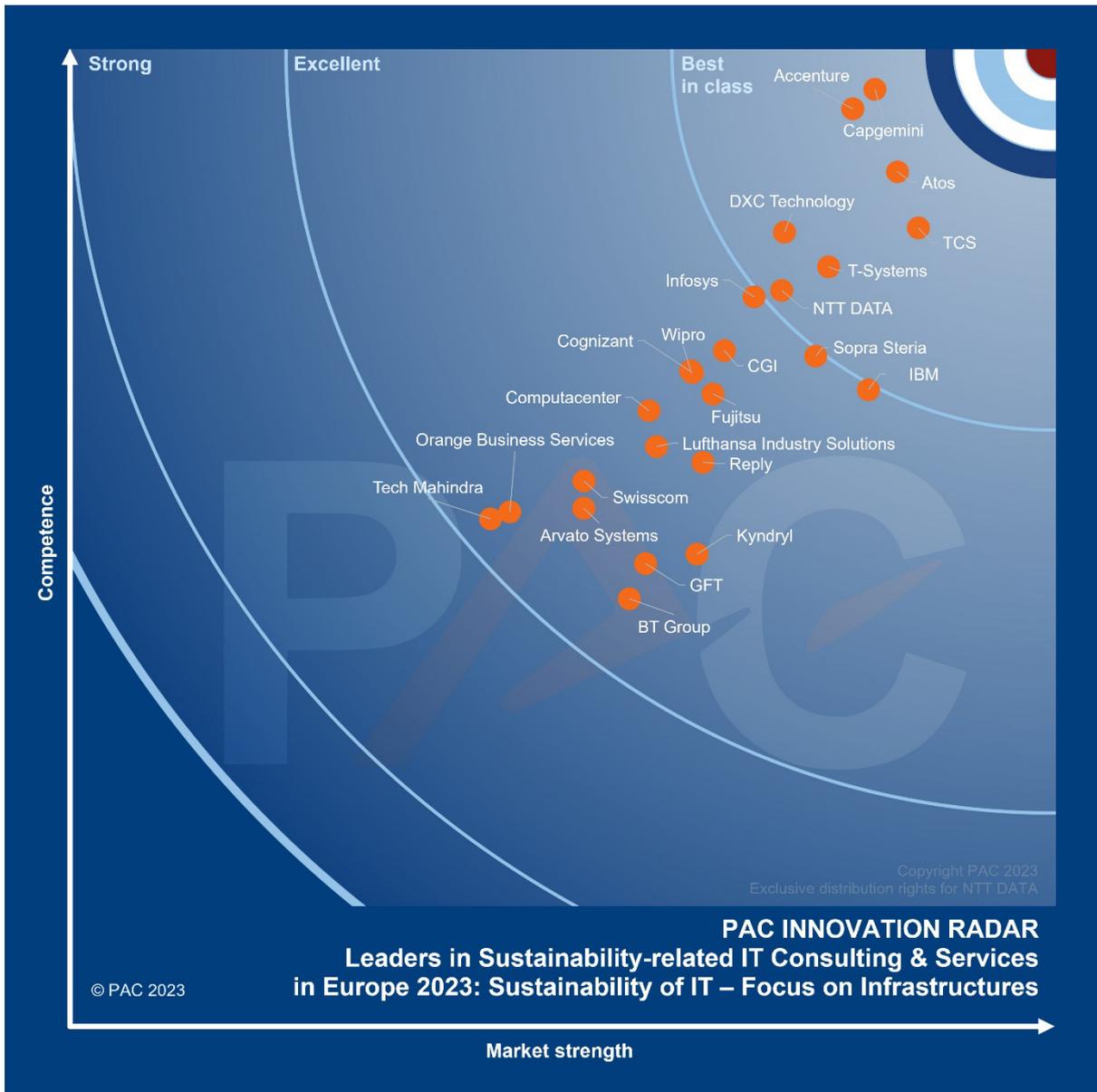


Fig. 6: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Infrastructures”

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

**PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023”:
Sustainability of IT – Focus on Infrastructures**

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.21 | 2.01 |
| Competence | 2.17 | 1.89 |
| Total score | 2.18 | 1.92 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY OF IT – FOCUS ON THE BANKING SECTOR"

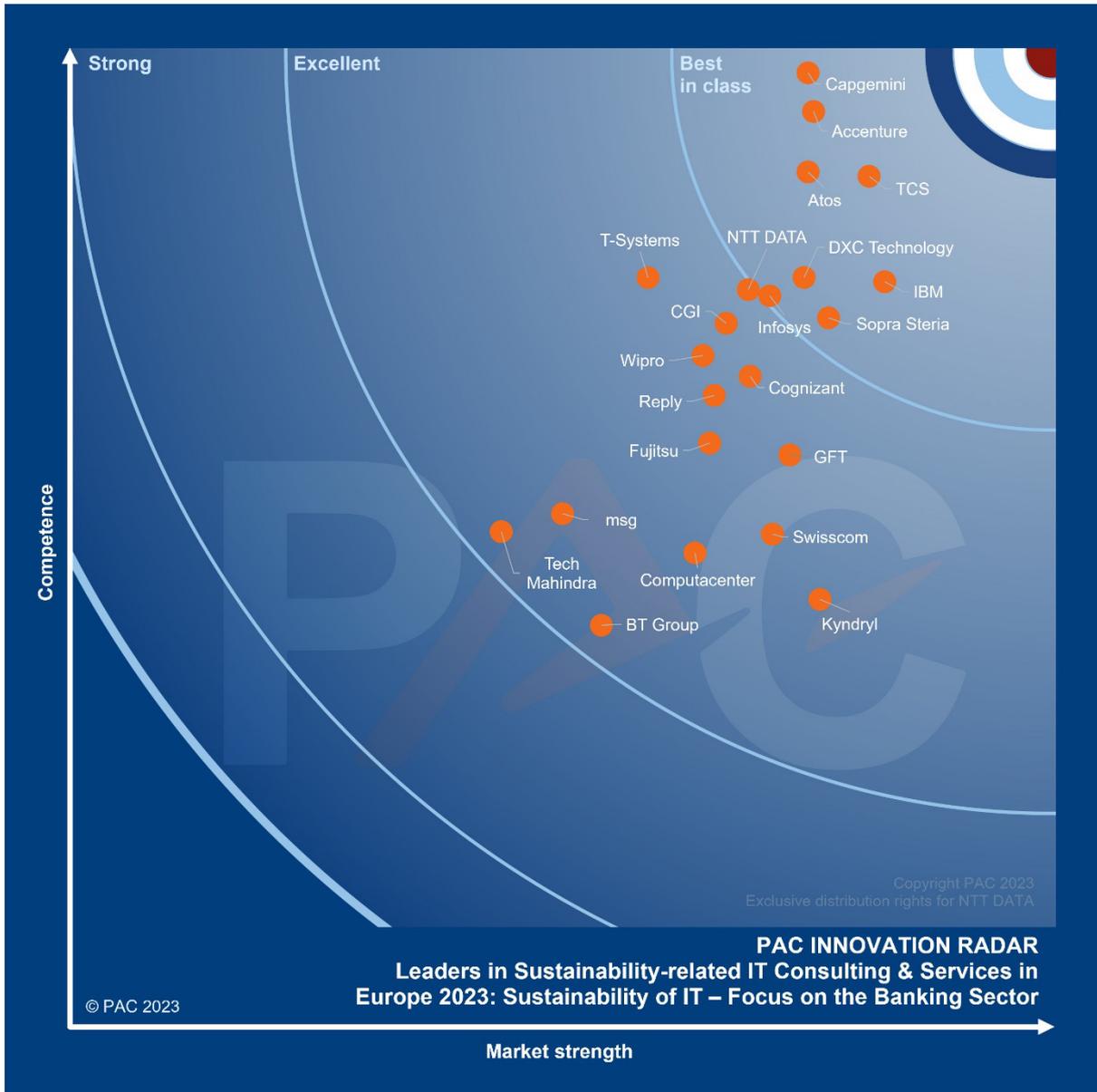


Fig. 7: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on the Banking Sector"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on the Banking Sector”

Excellent

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.13 | 2.17 |
| Competence | 2.15 | 1.92 |
| Total score | 2.14 | 2.04 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY THROUGH IT"

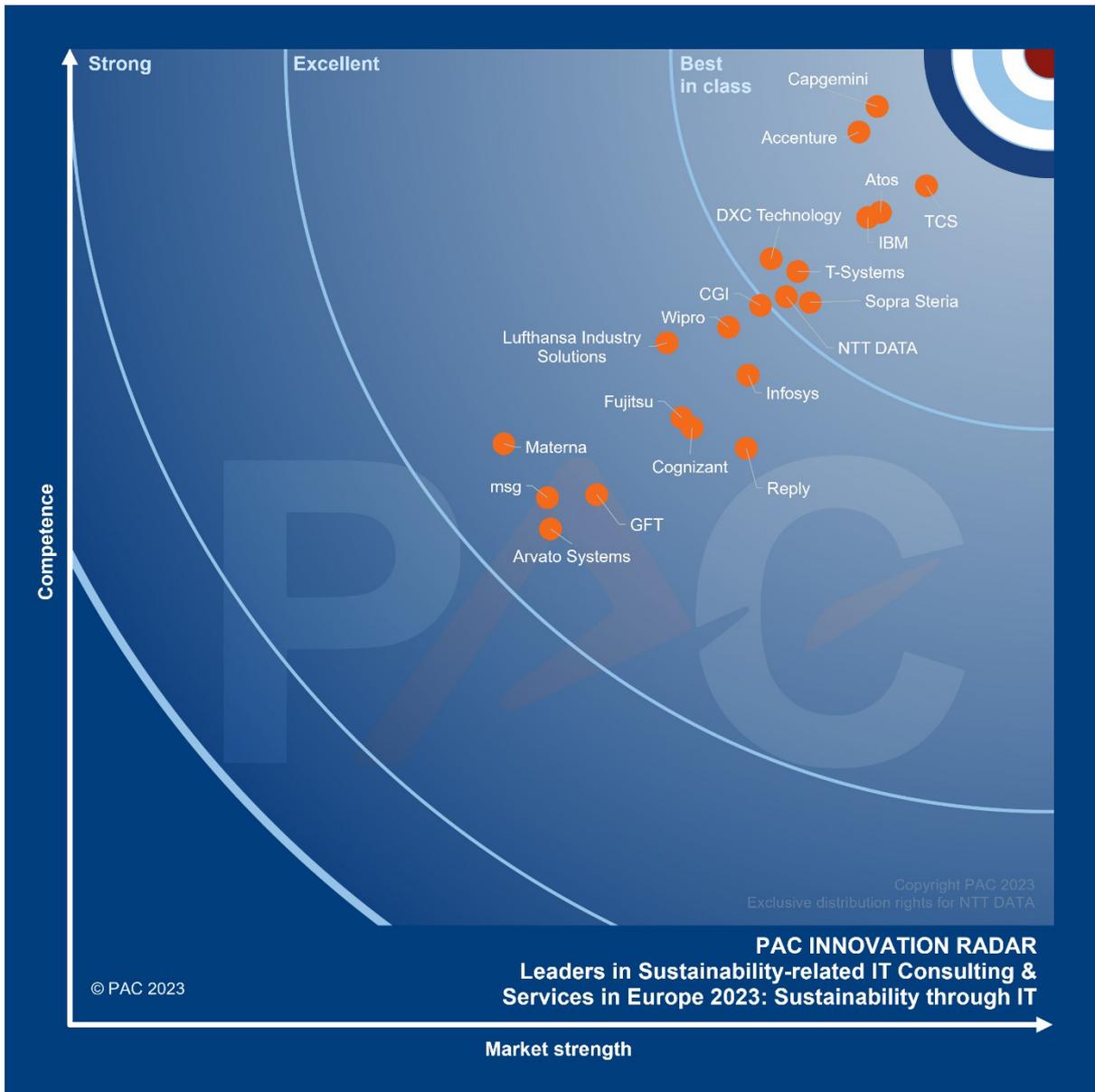


Fig. 8: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through IT"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through IT”

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.12 | 1.99 |
| Competence | 2.01 | 1.92 |
| Total score | 2.05 | 1.95 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY REPORTING"

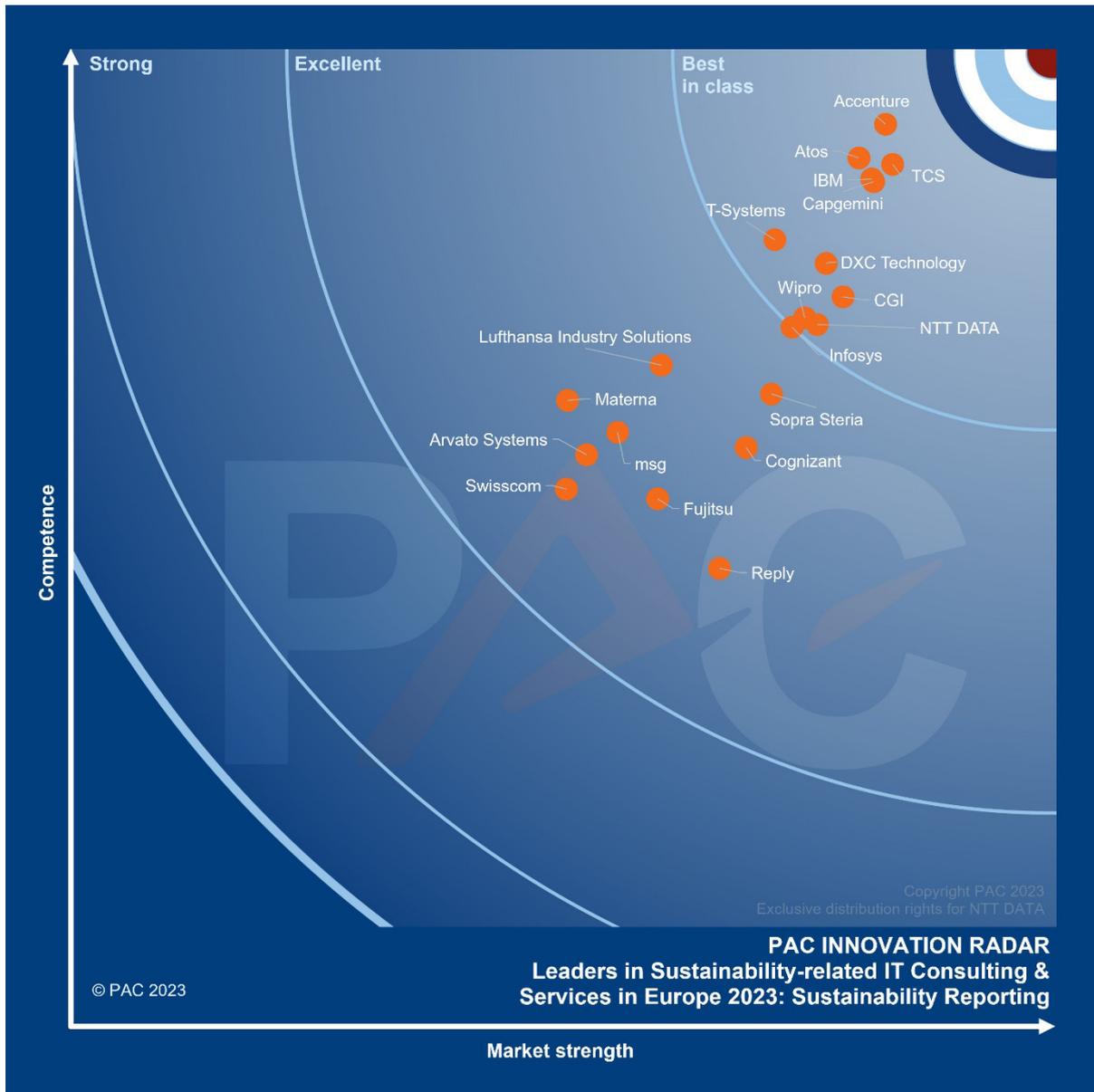


Fig. 1: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability Reporting"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability Reporting”

Best in Class

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 2.06 | 1.82 |
| Competence | 2.01 | 1.96 |
| Total score | 2.02 | 1.93 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

PAC INNOVATION RADAR "LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2023: SUSTAINABILITY THROUGH THE INTERNET OF THINGS (IOT)"

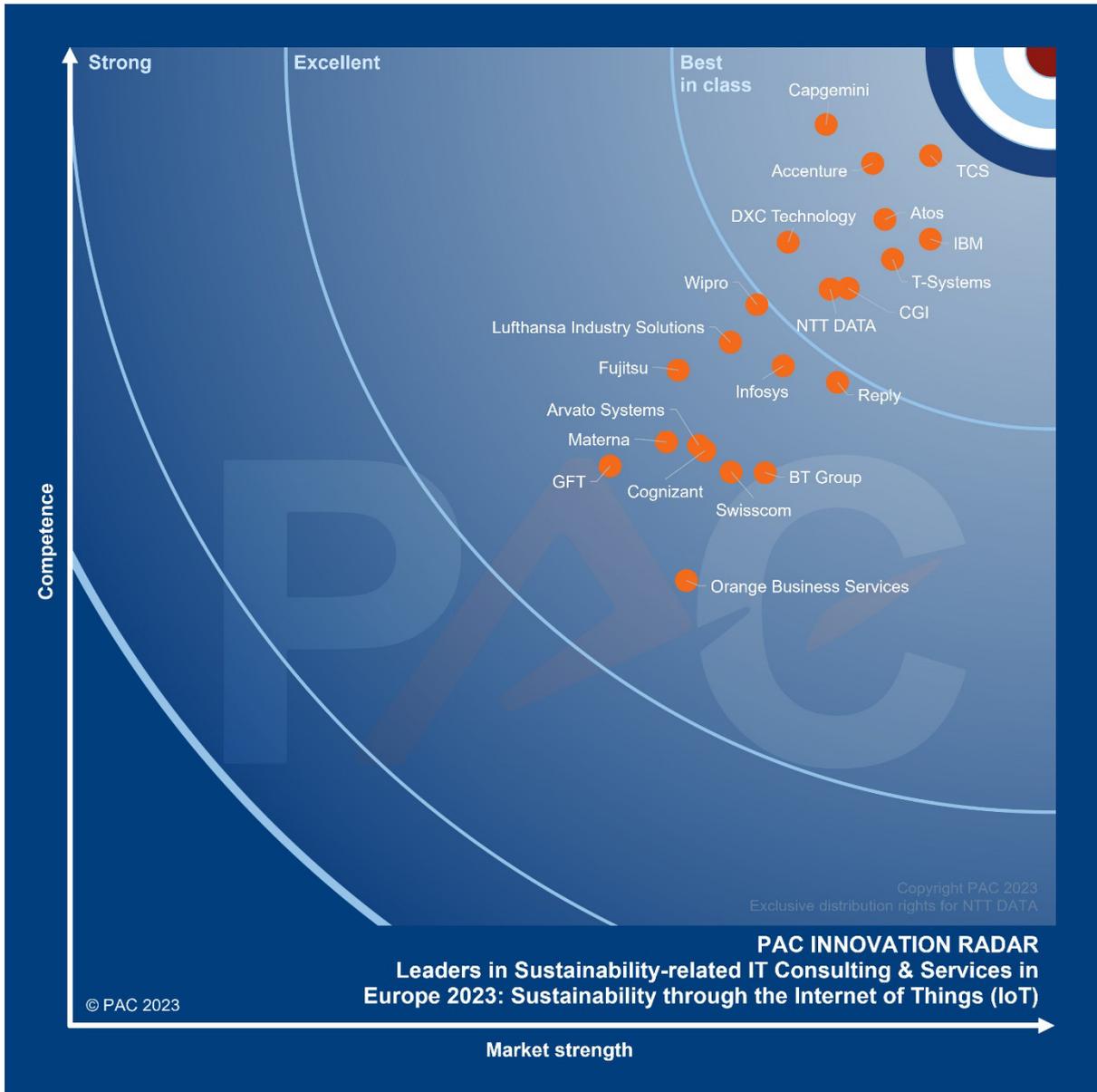


Fig. 2: PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through the Internet of Things (IoT)"

REVIEW OF TOP-SEEDED PROVIDER NTT DATA

NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through the Internet of Things (IoT)” **Best in Class**

| Cluster | Average | NTT DATA |
|--------------------|-------------|-------------|
| Market strength | 1.97 | 1.82 |
| Competence | 2.06 | 1.88 |
| Total score | 2.01 | 1.84 |

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)
- Intellectual property (IP) (tools, templates, frameworks)
- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- General strength on the EMEA market

OBJECTIVE OF THE PAC RADAR

What is the PAC RADAR?

The PAC RADAR is an effective tool for the holistic evaluation and visual positioning of software and ICT service providers on local markets. Numerous ICT and business decision-makers in user companies of all industries and company sizes rely on the PAC RADAR when selecting their partners and developing their sourcing strategies.

With the help of predefined criteria, PAC evaluates and compares providers' strategies, development, and market position, in addition to their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge.

All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews and a detailed self-disclosure from each provider.

PAC reserves to also evaluate and position relevant providers in the PAC RADAR that do not participate in the self-disclosure process.

After the evaluation of the predefined criteria, each supplier's position is plotted in the PAC RADAR. The criteria are classified by clusters

and can all be attributed to the "Competence" and "Market Strength" clusters. The provider evaluation, including a market description, is published as a report.

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR. While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments. Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue figures and resources.

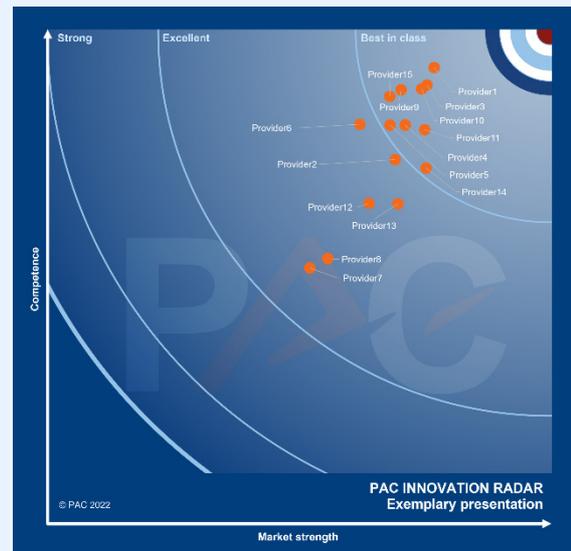


Fig. 3: Classification of providers in the PAC INNOVATION RADAR graph (example)

The classification of providers is based on the overall score:

| | |
|-----------------|-----------|
| "Best in Class" | 1.0 – 1.9 |
| "Excellent" | 2.0 – 2.9 |
| "Strong" | 3.0 – 3.9 |

SCOPE & DEFINITIONS

Scope

The geographic scope is Europe. PAC will consider local projects in individual countries as well as multinational engagements across Europe.

Approaches toward increasing ecological sustainability are manifold and may focus on selected IT infrastructures or on the application landscape, but they may also be more comprehensive, taking overall strategy and business processes into account. Also, they may be temporary and project-based or comprise longer-term operations and transformation engagements.

Definitions

Consulting & Systems Integration

Ecological sustainability-related consulting & systems integration (C&SI) includes

- **sustainability-related IT consulting services** (planning, specification, and design of IT systems),
- **IT-related process consulting within the framework of sustainability-related projects** (purely IT-related services such as the audit of system environments, technological/ architectural design, and the selection of technologies and solutions around sustainability, but also business process reengineering and change management around sustainability projects), as well as
- **systems integration** (sustainability-related software development, implementation services, integration of solutions, and sustainability-related IT infrastructure services such as data center consolidation, infrastructure modernization, and cloud migration).

Operations

Ecological sustainability-related operations services refer to the maintenance, operation, management, and often ongoing enhancement of an IT infrastructure, application, or even IT-based business process, under a longer-term contract, with a commitment to fulfilling predefined service level agreements (SLAs), or to reach predefined targets.

Operations services can be delivered on the client's or on the provider's premises, or on third-party public cloud infrastructures, for instance.

This PAC INNOVATION RADAR series covers both dedicated sustainability-related consulting and services as well as sustainability-related elements of non-dedicated, broader IT services engagements.

Sustainability-related strategy consulting and process consulting will only be considered if it is part of a broader IT services portfolio, i.e., unlike IT service providers with management consulting capabilities, mere management consultants without a significant IT services business will not be considered.



Fig. 4: PAC RADAR series “Leaders in Sustainability-related IT Consulting & Services”

Notes on the topic-specific RADAR analyses:

- *The European RADAR analyses consider the general strength of sustainability-related IT consulting and services in Europe.*
- *The country-specific RADAR analyses consider the general strength in sustainability-related IT consulting and services as well as the strength in the respective country.*
- *The RADAR "Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through the Internet of Things (IoT)" addresses sustainability performance through IoT concepts in areas such as smart city, smart building, smart factory, smart mobility, smart energy, etc.*
- *The RADAR "Sustainability-related IT Consulting & Services in Europe 2023: Sustainability Reporting" addresses the specific requirements of sustainability reporting.*
- *The RADAR "Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT - Focus on the Banking Sector" addresses the "sustainability of IT" in the banking sector.*

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC RADAR?

Providers are selected and invited according to the following criteria:

- **Size of revenues** in the segment to be analyzed in the specified region.
- **“Relevance”**: Even providers that do not belong to the top-selling providers in the segment to be analyzed are considered if PAC classifies them as relevant for potential customers, for instance due to an innovative offering, strong growth, or a focus on a specific customer group (e.g., SMBs).

There is no differentiation as to whether the providers are customers of PAC – neither in the selection of the providers to be positioned, nor in the actual evaluation.

What do providers have to do in order to be considered in a PAC RADAR analysis?

The decision as to which providers are considered in the PAC RADAR analysis is entirely up to PAC. Providers do not have any direct influence on this decision.

However, in the run-up to a PAC RADAR analysis, providers can make sure in an indirect

way that PAC can adequately evaluate their offerings and positioning – and thus their relevance – e.g., by means of regular analyst briefings, etc.

Why should providers accept the invitation to actively participate?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC RADAR, nor their assessment. However, there are a whole host of benefits associated with active participation:

- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment.
- Participating providers can set out their specific competencies, strengths, and weaknesses as well as their strategies and visions.
- The review process guarantees the accuracy of the assessed factors.
- Submitting customer assessments can have a positive impact on the overall score.
- The provider gets a neutral, comprehensive, and detailed view of their strengths and weaknesses as compared to the direct competition – related to a specific service in a local market.
- A positioning in the PAC RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

Considered providers

| Analyzed and positioned based on the proven PAC methodology as well as active participation in the PAC RADAR process | Analyzed and positioned based on proven PAC methodology |
|---|--|
| <ul style="list-style-type: none"> • Arvato Systems • Atos • BT Group • Capgemini • CGI • Cognizant • DXC Technology • Fujitsu • GFT • Lufthansa Industry Solutions • Materna • msg • NTT Data • Orange Business Services • Reply • Sopra Steria • Swisscom • T-Systems • TCS • Tech Mahindra | <ul style="list-style-type: none"> • Accenture • Computacenter • IBM • Infosys • Kyndryl • Wipro |

Whether or not a provider participated in the RADAR process did not actually affect their inclusion and positioning in the PAC INNOVATION RADAR, nor their assessment. Providers were selected and invited according to their portfolio, positioning and "relevance" in the analyzed segment in Europe. Smaller or mere regional suppliers were assessed with participation in the RADAR process.

If a relevant provider decided to not participate in the RADAR process, the assessment was performed using the proven PAC methodology. This, however, requires a certain general transparency, which is why potentially relevant players such as PwC, EY, KPMG, or Deloitte were not included in the assessment.

Considered providers by segment

| Sustainability-related IT Consulting & Services in Europe 2023 | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Applications | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Infrastructures |
|---|---|---|---|
| <ul style="list-style-type: none"> Accenture Arvato Systems Atos BT Group Capgemini CGI Cognizant Computacenter DXC Technology Fujitsu GFT IBM Infosys Kyndryl Lufthansa Industry Solutions Materna msg NTT DATA Orange Business Services Reply Sopra Steria Swisscom T-Systems TCS Tech Mahindra Wipro | <ul style="list-style-type: none"> Accenture Arvato Systems Atos BT Group Capgemini CGI Cognizant Computacenter DXC Technology Fujitsu GFT IBM Infosys Kyndryl Lufthansa Industry Solutions Materna msg NTT DATA Orange Business Services Reply Sopra Steria Swisscom T-Systems TCS Tech Mahindra Wipro | <ul style="list-style-type: none"> Accenture Arvato Systems Atos Capgemini CGI Cognizant DXC Technology Fujitsu GFT IBM Infosys Lufthansa Industry Solutions Materna msg NTT DATA Reply Sopra Steria T-Systems TCS Tech Mahindra Wipro | <ul style="list-style-type: none"> Accenture Arvato Systems Atos BT Group Capgemini CGI Cognizant Computacenter DXC Technology Fujitsu GFT IBM Infosys Kyndryl Lufthansa Industry Solutions NTT DATA Orange Business Services Reply Sopra Steria Swisscom T-Systems TCS Tech Mahindra Wipro |
| Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through IT | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability Reporting | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on the Banking Sector | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through Internet of Things (IoT) |
| <ul style="list-style-type: none"> Accenture Arvato Systems Atos Capgemini CGI Cognizant DXC Technology Fujitsu GFT IBM Infosys Lufthansa Industry Solutions Materna msg NTT DATA Reply Sopra Steria Swisscom T-Systems TCS Wipro | <ul style="list-style-type: none"> Accenture Arvato Systems Atos Capgemini CGI Cognizant DXC Technology Fujitsu IBM Infosys Lufthansa Industry Solutions Materna msg NTT DATA Reply Sopra Steria Swisscom T-Systems TCS Wipro | <ul style="list-style-type: none"> Accenture Atos BT Group Capgemini CGI Cognizant Computacenter DXC Technology Fujitsu GFT IBM Infosys Kyndryl msg NTT DATA Reply Sopra Steria Swisscom T-Systems TCS Tech Mahindra Wipro | <ul style="list-style-type: none"> Accenture Arvato Systems Atos BT Group Capgemini CGI Cognizant DXC Technology Fujitsu GFT IBM Infosys Lufthansa Industry Solutions Materna NTT DATA Orange Business Services Reply Swisscom T-Systems TCS Wipro |

| Sustainability-related IT Consulting & Services in Germany 2023 | Sustainability-related IT Consulting & Services in the UK 2023 | Sustainability-related IT Consulting & Services in France 2023 |
|---|--|--|
| <ul style="list-style-type: none"> • Accenture • Arvato Systems • Atos • Capgemini • CGI • Cognizant • Computacenter • DXC Technology • Fujitsu • GFT • IBM • Infosys • Kyndryl • Lufthansa Industry Solutions • Materna • msg • NTT DATA • Reply • Sopra Steria • T-Systems • TCS • Tech Mahindra • Wipro | <ul style="list-style-type: none"> • Accenture • Atos • BT Group • Capgemini • CGI • Cognizant • Computacenter • DXC Technology • Fujitsu • IBM • Infosys • Kyndryl • NTT DATA • Sopra Steria • TCS • Tech Mahindra • Wipro | <ul style="list-style-type: none"> • Accenture • Atos • Capgemini • CGI • Cognizant • Computacenter • DXC Technology • IBM • Infosys • Kyndryl • Orange Business Services • Sopra Steria • TCS • Wipro |

The concept

PAC uses **predefined criteria** to assess and compare the providers within given service segments.

The assessment is based on the report-card score within the peer group of the positioned providers.

This is based on:

- dedicated interviews about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- the analysis of existing PAC databases;
- secondary research.

The provider data is verified by PAC and any omissions are rectified based on estimates.

If the provider does not participate, the assessment is performed using the proven PAC methodology, mainly based on:

- information obtained from face-to-face interviews with the provider's representatives, analyst briefings, etc.;
- an assessment of company presentations, company reports, etc.;
- an assessment of PAC databases;
- an assessment of earlier PAC RADARs in which the provider participated;
- a poll among the provider's customers (as required) on their experiences and satisfaction.

Reissue of published RADARs

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR was published.

The evaluations may not be directly comparable with those of any previous version due to subsequent content modifications. In particular, they do not depict a development of individual providers over time.

Methodological and/or organizational modifications may be made due to changing market conditions and trends, and may include:

- a different peer group in the focus of the analysis;
- modification of individual criteria within clusters and sub-clusters;
- increased or altered expectations by user companies;
- adjustment of the weighting of individual criteria.

Evaluation criteria

| | |
|---|---|
| | General criteria (considered at a European level to varying extents for several RADARs) |
| Cluster "Competence" | <ul style="list-style-type: none"> Organizational anchoring of sustainability-related IT consulting & services Portfolio: dedicated sustainability-related services offering Portfolio & competencies: strategy and process consulting (beyond IT consulting) Portfolio & competencies: IT consulting Portfolio & competencies: infrastructure-related systems integration services Portfolio & competencies: application-related systems integration services Portfolio: proprietary sustainability-related platform/software Portfolio: maturity level Intellectual property (IP) (tools, templates, frameworks) Competence and experience in supporting customers' financial reporting Competence and experience in supporting customers' sustainability reporting General strength in IT operations (applications) General strength in IT operations (infrastructures) Homogeneous vertical coverage Resources: sustainability-related employees & employee development (e.g., hiring, up-skilling) Overall commitment to sustainability (e.g., history, internal measures, business transformation) Vision & strategy (clearly defined and KPI-anchored) Sustainability-related ecosystem: partnerships with start-ups/specialists Corporate transparency |
| Cluster "Market strength" | <ul style="list-style-type: none"> Resources: homogeneous on-site presence across countries (in Europe) Portfolio: sustainability-related services embedded in overall portfolio Anchoring of sustainability-related IT consulting & services in the overall go-to-market Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google) Breadth & depth of available case studies - sustainability through IT Breadth & depth of available case studies - sustainability of IT Focus on medium-sized and small accounts Focus on large accounts Investments in sustainability services-related assets (IP, tools, solutions, methods, R&D, M&A) Competence and experience in supporting customers' "sustainability through IoT" strategies General strength in analytics and data management General strength on the EMEA market General strength in the banking sector General strength on the German market General strength on the UK market General strength on the French market |
| | Sustainability-related IT Consulting & Services in Europe 2023 |
| Dedicated criteria / criteria with higher weighting | <ul style="list-style-type: none"> Portfolio & competencies: application-related systems integration services Portfolio & competencies: infrastructure-related systems integration services Portfolio & competencies: IT consulting Vision & strategy (clearly defined and KPI-anchored) Competence and experience in supporting customers' sustainability reporting Organizational anchoring of sustainability-related IT consulting & services |
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT |
| Dedicated criteria / criteria with higher weighting | <ul style="list-style-type: none"> Portfolio & competencies: application-related systems integration services Portfolio & competencies: infrastructure-related systems integration services Portfolio & competencies: IT consulting Organizational anchoring of sustainability-related IT consulting & services Breadth & depth of available case studies - sustainability of IT |

| | |
|--|--|
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Applications |
| Dedicated criteria / criteria with higher weighting | Portfolio & competencies: application-related systems integration services Portfolio & competencies: IT consulting Organizational anchoring of sustainability-related IT consulting & services Breadth & depth of available case studies - sustainability of IT General strength in IT operations (applications) |
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on Infrastructures |
| Dedicated criteria / criteria with higher weighting | Portfolio & competencies: infrastructure-related systems integration services Portfolio & competencies: IT consulting Organizational anchoring of sustainability-related IT consulting & services Breadth & depth of available case studies - sustainability of IT General strength in IT operations (infrastructures) |
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability through IT |
| Dedicated criteria / criteria with higher weighting | Vision & strategy (clearly defined and KPI-anchored) Competence and experience in supporting customers' sustainability reporting General strength in analytics and data management Portfolio & competencies: application-related systems integration services Breadth & depth of available case studies - sustainability through IT Portfolio & competencies: strategy and process consulting (beyond IT consulting) Portfolio & competencies: IT consulting Organizational anchoring of sustainability-related IT consulting & services Portfolio: dedicated sustainability-related services offering Portfolio: sustainability-related services embedded in overall portfolio Resources: sustainability-related employees & employee development (e.g., hiring, up-skilling) Overall commitment to sustainability (e.g., history, internal measures, business transformation) Sustainability-related ecosystem: partnerships with start-ups/specialists Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google) Investments in sustainability services-related assets (IP, tools, solutions, methods, R&D, M&A) |
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability Reporting |
| Dedicated criteria / criteria with higher weighting | Competence and experience in supporting customers' sustainability reporting General strength in analytics and data management Sustainability-related ecosystem: partnerships with start-ups/specialists Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google) Competence and experience in supporting customers' financial reporting |
| | Sustainability-related IT Consulting & Services in Europe 2023: Sustainability of IT – Focus on the Banking Sector |
| Dedicated criteria / criteria with higher weighting | General strength in the banking sector Portfolio & competencies: application-related systems integration services Portfolio & competencies: infrastructure-related systems integration services Portfolio & competencies: IT consulting Organizational anchoring of sustainability-related IT consulting & services Breadth & depth of available case studies - sustainability of IT |

Sustainability-related IT Consulting & Services in Europe 2023:
Sustainability through the Internet of Things (IoT)

Dedicated criteria / criteria with higher weighting

Competence and experience in supporting customers' "sustainability through IoT" strategies
Vision & strategy (clearly defined and KPI-anchored)
General strength in analytics and data management
General strength on the EMEA market
Breadth & depth of available case studies - sustainability through IT
Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)
Overall commitment to sustainability (e.g., history, internal measures, business transformation)

Sustainability-related IT Consulting & Services in Germany 2023

Dedicated criteria / criteria with higher weighting

General strength on the German market
Portfolio & competencies: application-related systems integration services
Portfolio & competencies: infrastructure-related systems integration services
Portfolio & competencies: IT consulting
Vision & strategy (clearly defined and KPI-anchored)
Competence and experience in supporting customers' sustainability reporting
Organizational anchoring of sustainability-related IT consulting & services

Sustainability-related IT Consulting & Services in the UK 2023

Dedicated criteria / criteria with higher weighting

General strength on the UK market
Portfolio & competencies: application-related systems integration services
Portfolio & competencies: infrastructure-related systems integration services
Portfolio & competencies: IT consulting
Vision & strategy (clearly defined and KPI-anchored)
Competence and experience in supporting customers' sustainability reporting
Organizational anchoring of sustainability-related IT consulting & services

Sustainability-related IT Consulting & Services in France 2023

Dedicated criteria / criteria with higher weighting

General strength on the French market
Portfolio & competencies: application-related systems integration services
Portfolio & competencies: infrastructure-related systems integration services
Portfolio & competencies: IT consulting
Vision & strategy (clearly defined and KPI-anchored)
Competence and experience in supporting customers' sustainability reporting
Organizational anchoring of sustainability-related IT consulting & services

General PAC research method

The following overview describes PAC’s research method for market analysis and key differentiation features.

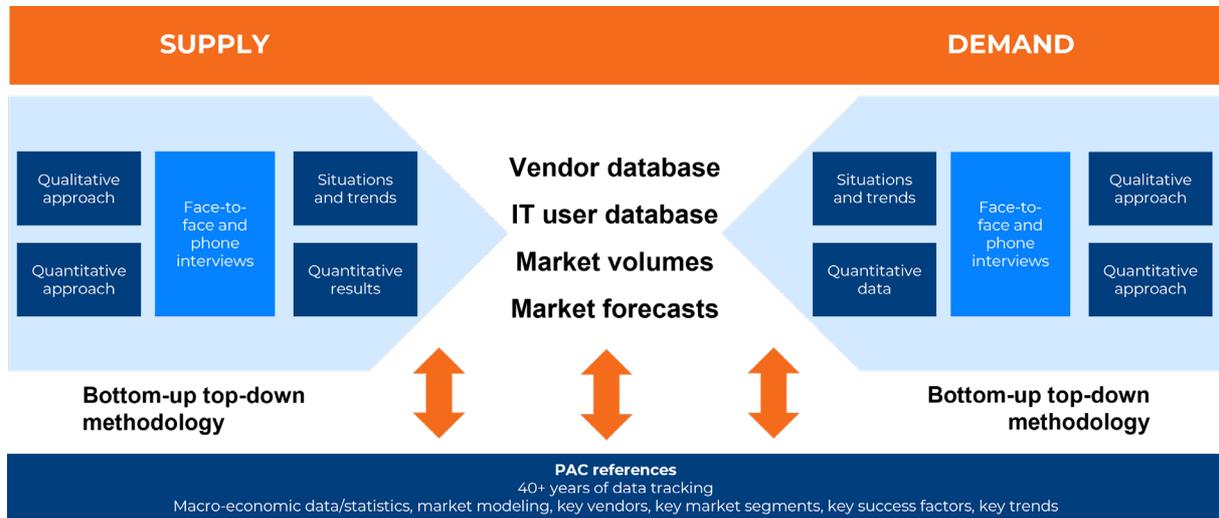


Fig. 5: Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC’s methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

Positioning within the PAC RADAR

Based on the scores in competence and market strength, the overall score is calculated. The overall score is calculated by using the weighted criteria assigned to the "Competence" and "Market Strength" clusters. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR. Here, the following applies: The closer a company is to the center, the closer they are to meeting customers’ requirements.



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ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITS[®] research platform.

More on www.pacanalyst.com.