RADAR

Leaders in AI-related Services in Europe 2024

SITSI® I Vendor Analysis I PAC INNOVATION RADAR

AI-related Services in Europe
AI-related Services in France
GenAI-related Services in Europe
AI-related Services for Digital Customer Experience in Europe
AI-related Services for Production in Europe
AI-related Services for Supply Chain Management & Logistics in Europe

– Consolidated –

Positioning of Orange Business

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PAC

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INTRODUCTION

The first developments in artificial intelligence were made several decades ago, and the first chatbot was developed more than half a century ago. Even though AI is not a new concept, we have witnessed phenomenal interest in AI-based tools and services in the past few years, which has become a major driver of IT sales. The meteoric rise of generative AI, including LLMs and foundation models, has disrupted the market and reshaped the approach to digital transformation.

This market upheaval has sparked discussions about accountability, ethics, and legal frameworks that guide the development of AI. Concepts like explainable AI (XAI), responsible AI (RAI), and sovereign AI have started to be incorporated into vendor offerings and guidelines for the reliable use of AI.

Unlike other new technologies, AI has enormous transformational power on every layer of society, technology, and the economy. In the coming years, it will be interesting to see how stakeholders position themselves in this landscape and how they deal with the challenges brought by the increased adoption of AI-enhanced tools.

The ecosystems of cloud platforms (such as Microsoft, AWS, OpenAI, and Mistral AI), business applications (such as SAP, ServiceNow, Oracle, and Salesforce), consulting, and system implementation are generating new partnerships to drive innovation in various vertical and horizontal use cases.

Over the past two years, the excitement around AI tools has slightly outpaced the actual project implementations. Companies have announced large-scale investments in R&D to enhance their AI capabilities to meet customers' evolving demands. The next two years could potentially see some level of maturity of AI-related projects.

In this context, newly established regulatory frameworks have provided guidelines that point the way to smoother adoption. The European Parliament and Council approved the Artificial Intelligence Act in March and May 2024, respectively. While the full law will take effect in about two years' time, some provisions will apply sooner. This legal framework is expected to create a more trustworthy environment for AI development and deployment.

IT vendors have been keen not to be left behind. They have made investments in AI for their internal transformation (such as training and certifications) and to create new customer tools and services. Their clients have expressed interest in these solutions to keep up with the latest developments in this field.

Against this background, we have evaluated the most convincing approaches to meeting growing demand and positioned the leading providers in a **PAC INNOVATION RADAR series on "AI-related IT Services in Europe, France, and Germany 2024"**. We have analyzed a total of 28 IT service providers considered relevant for the industry, assessing their specific strengths and weaknesses based on multiple predefined criteria. The results have been published in eleven PAC RADAR reports, which present providers by region (Europe, France, Germany) or focus on different aspects of business processes (such as back office, SCM, and customer service). There is also a special evaluation of the providers' service portfolios for GenAI and for German SMEs.

PAC INNOVATION RADAR "LEADERS IN AI-RELATED SERVICES IN EUROPE 2024"

Fig. 1: PAC INNOVATION RADAR "Leaders in AI-related Services in Europe 2024"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in AI-related Services in Europe		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.33	2.19
Competence	2.18	1.81
Total Score	**2.25**	**1.99**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• Significance of operations in AI-related services	• Significance of business consulting in AI-related services
• Dedicated organizational structures for AI-related services	• Relevance of back-office workflow processes in AI-related services
• Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)	• Focus on large accounts
• Cooperation with research institutes	• International presence (beyond Europe)
• Reference projects related to GenAI	• Focus on the German market
• Significance of client training in AI-related services	
• Focus on medium-sized and small accounts	
• Focus on the French market	
• Corporate transparency	
• Focus on the retail sector	

PAC INNOVATION RADAR "LEADERS IN AI-RELATED SERVICES IN FRANCE 2024"
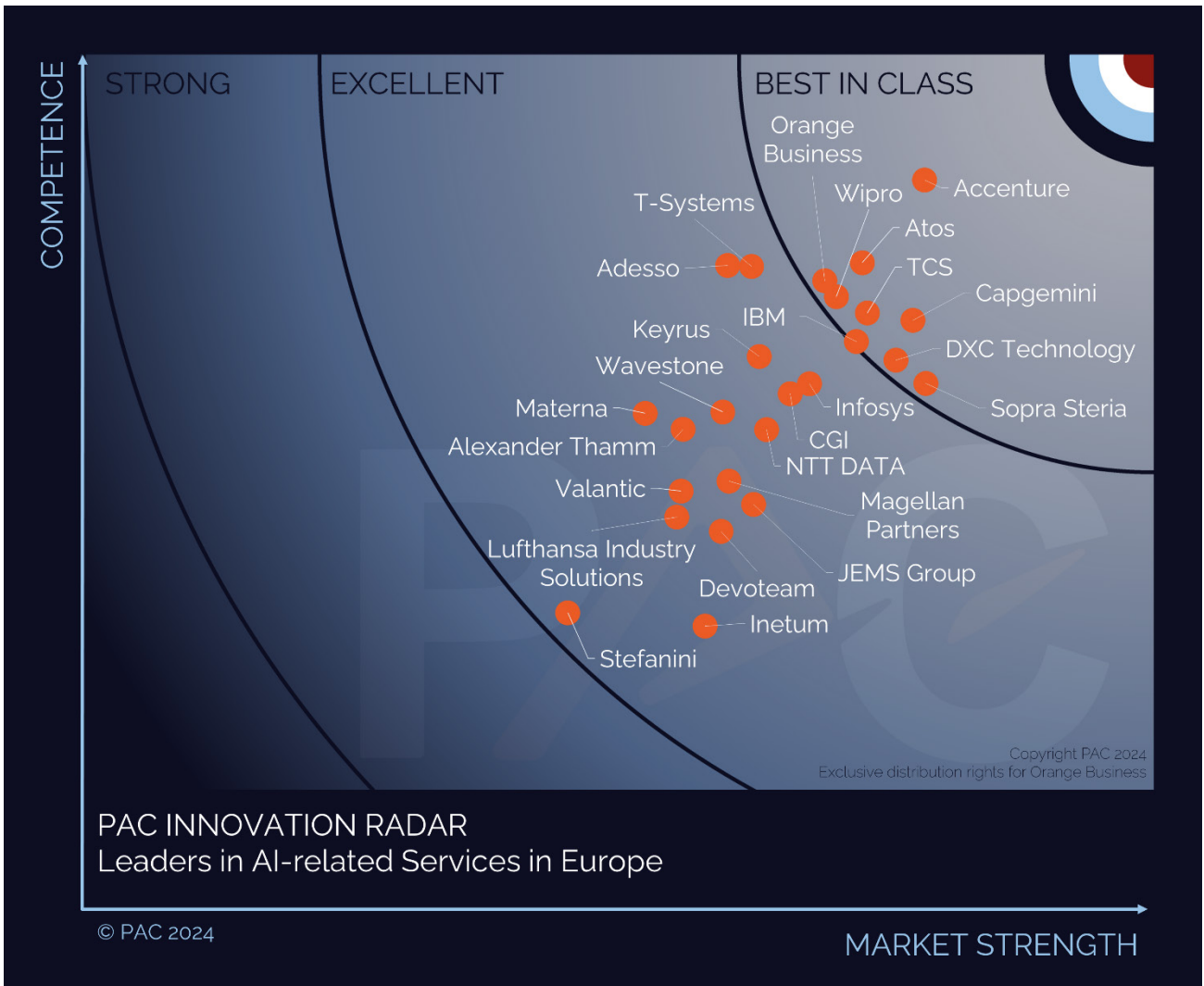

Fig. 2:   PAC INNOVATION RADAR "Leaders in AI-related Services in France 2024"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in AI-related Services in France		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.52	1.67
Competence	2.17	1.76
Total Score	**2.35**	**1.71**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• Significance of operations in AI-related services • Dedicated organizational structures for AI-related services • AI employees in France • Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.) • Cooperation with research institutes • Reference projects related to GenAI • Significance of client training in AI-related services • Focus on medium-sized and small accounts • Focus on the French market • Corporate transparency • Focus on the retail sector	• Significance of business consulting in AI-related services • Relevance of back-office workflow processes in AI-related services • Focus on large accounts • International presence (beyond Europe)

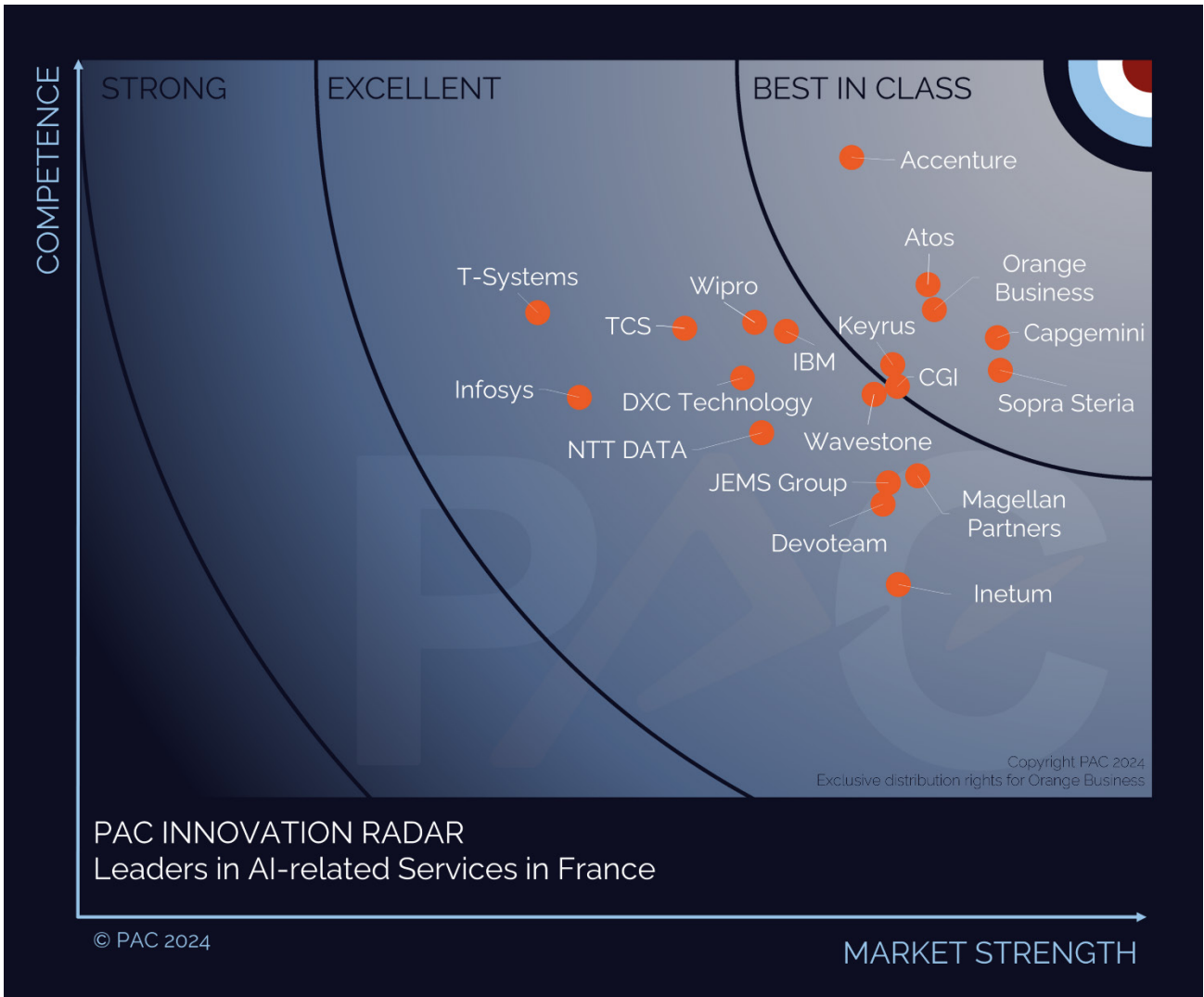# PAC INNOVATION RADAR "LEADERS IN GENAI-RELATED SERVICES IN EUROPE 2024"

Fig. 3: PAC INNOVATION RADAR "Leaders in GenAI-related Services in Europe 2024"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

RADAR

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in GenAI-related Services in Europe		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.29	2.00
Competence	2.24	1.83
Total Score	**2.27**	**1.91**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• Significance of operations in AI-related services • Dedicated organizational structures for AI-related services • Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.) • Cooperation with research institutes • Reference projects related to GenAI • Significance of client training in AI-related services • Focus on medium-sized and small accounts • Corporate transparency • Focus on the retail sector	• Significance of business consulting in AI-related services • Relevance of back-office workflow processes in AI-related services • Focus on large accounts • International presence (beyond Europe)

PAC INNOVATION RADAR "LEADERS IN AI-RELATED SERVICES FOR DIGITAL CUSTOMER ENGAGEMENT IN EUROPE 2024"
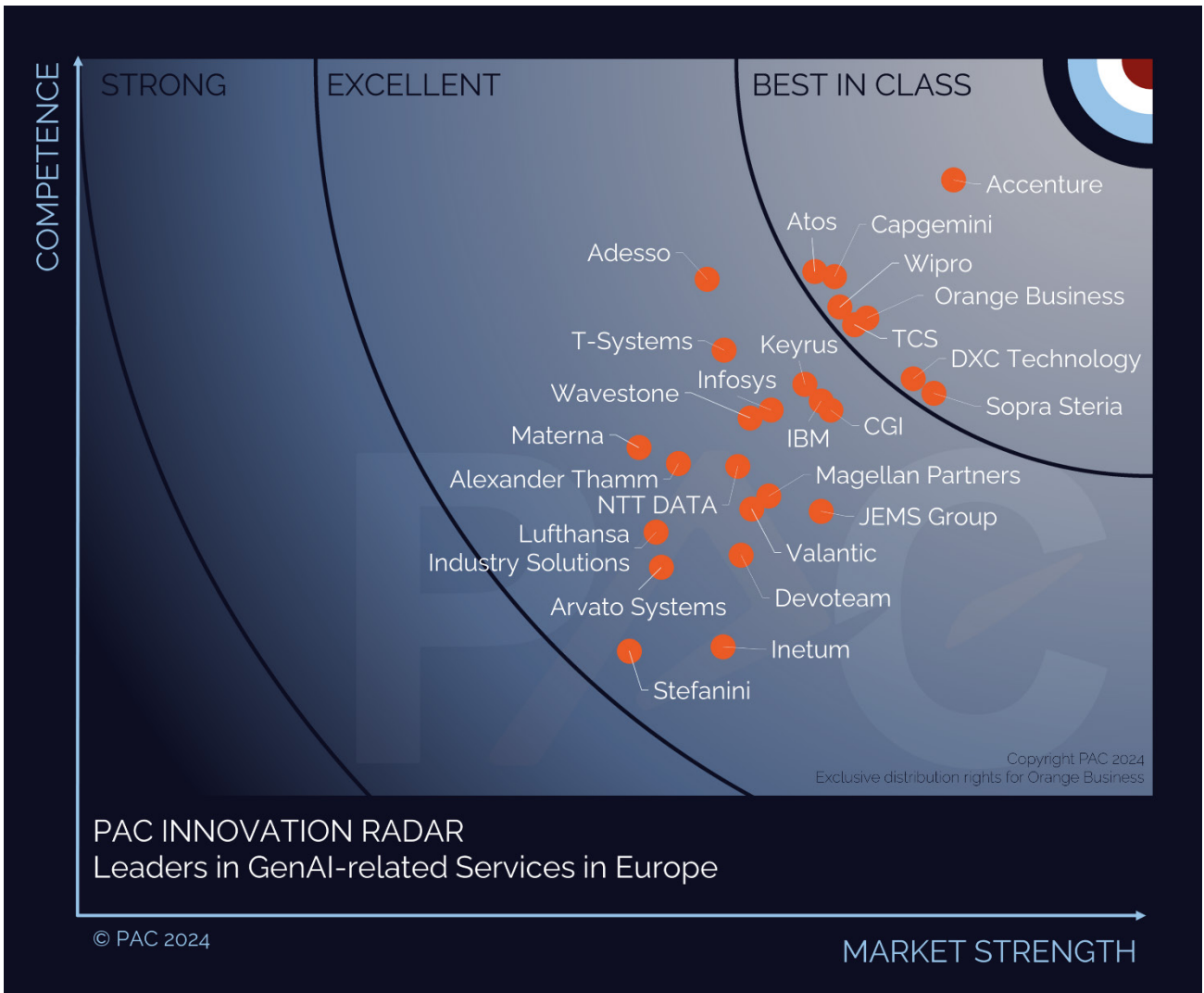

Fig. 4:   PAC INNOVATION RADAR "Leaders in AI-related Services for Digital Customer Engagement in Europe 2024"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in AI-related Services for Digital Customer Engagement in Europe		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.28	2.18
Competence	2.16	1.71
Total Score	**2.22**	**1.93**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• Significance of operations in AI-related services • Dedicated organizational structures for AI-related services • Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.) • Cooperation with research institutes • Reference projects related to GenAI • Significance of client training in AI-related services • Focus on medium-sized and small accounts • Focus on the French market • Corporate transparency • Focus on the retail sector	• Significance of business consulting in AI-related services • Relevance of back-office workflow processes in AI-related services • Focus on large accounts • International presence (beyond Europe) • Focus on the German market

PAC INNOVATION RADAR "LEADERS IN AI-RELATED SERVICES FOR PRODUCTION IN EUROPE 2024"

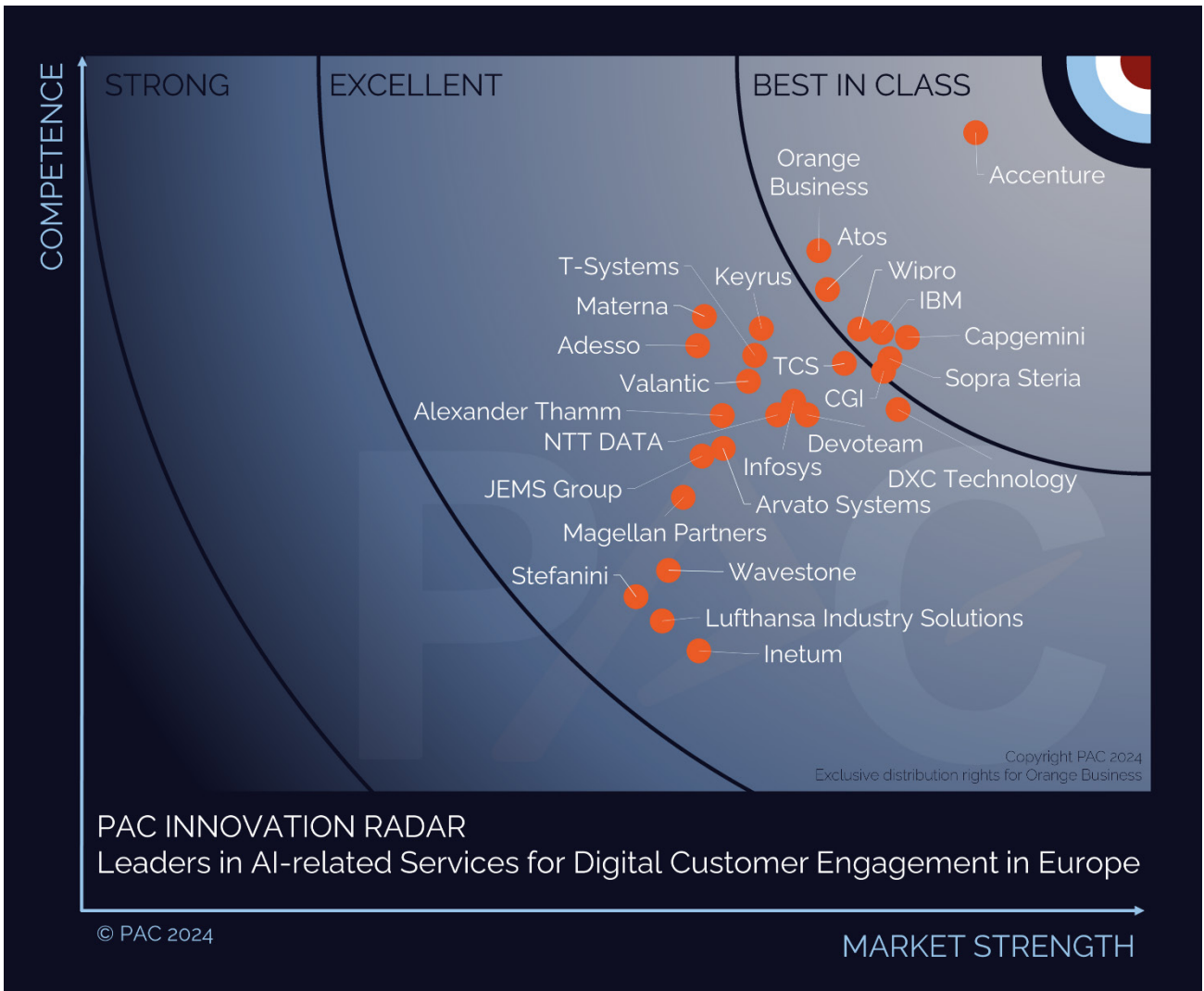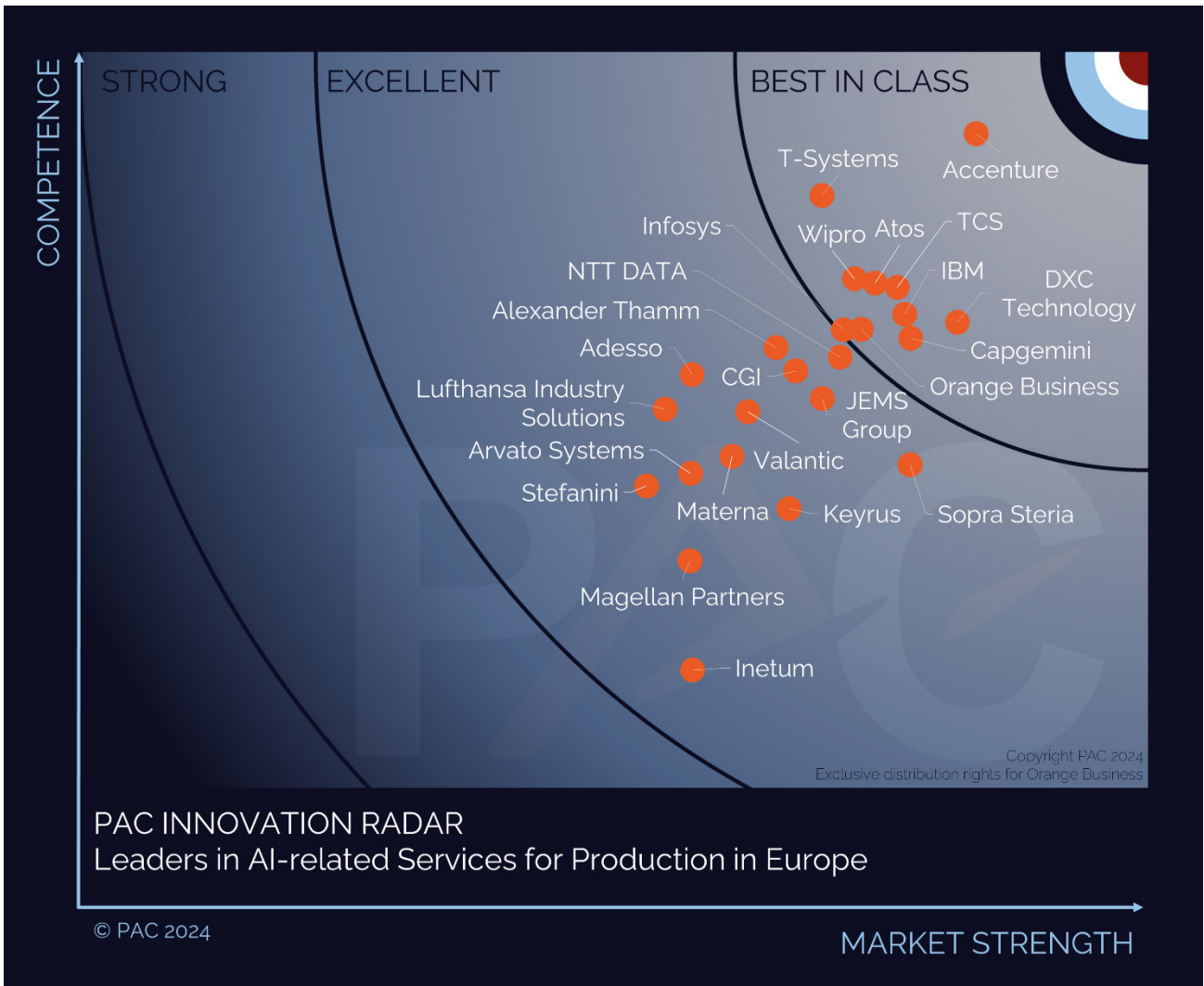*Fig. 5: PAC INNOVATION RADAR "Leaders in AI-related Services for Production in Europe 2024"*

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in AI-related Services for Production in Europe		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.23	2.01
Competence	2.17	1.92
Total Score	**2.19**	**1.96**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Significance of operations in AI-related services
- Dedicated organizational structures for AI-related services
- Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)
- Cooperation with research institutes
- Reference projects related to GenAI
- Significance of client training in AI-related services
- Focus on medium-sized and small accounts
- Corporate transparency

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Significance of business consulting in AI-related services
- Focus on large accounts
- International presence (beyond Europe)

PAC INNOVATION RADAR "LEADERS IN AI-RELATED SERVICES FOR SUPPLY CHAIN MANAGEMENT IN EUROPE 2024"
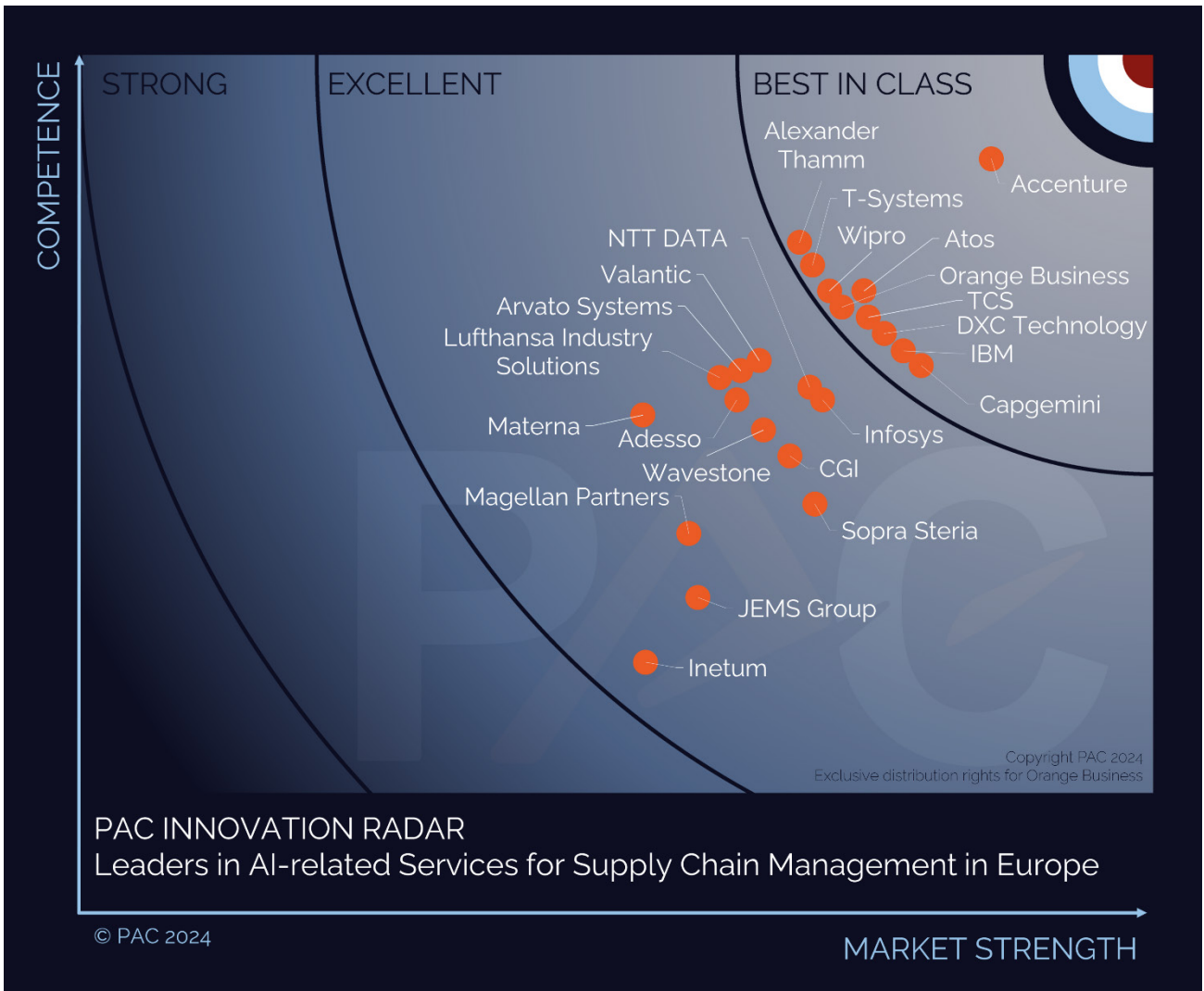

Fig. 6: PAC INNOVATION RADAR "Leaders in AI-related Services for Supply Chain Management in Europe 2024"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

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

REVIEW OF TOP-SEEDED PROVIDER ORANGE BUSINESS

Leaders in AI-related Services for Supply Chain Management in Europe		Positioning: Best in Class
Cluster	**Average**	**Orange Business**
Market Strength	2.31	2.09
Competence	2.23	1.84
Total Score	**2.27**	**1.95**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Significance of operations in AI-related services
- Dedicated organizational structures for AI-related services
- Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)
- Cooperation with research institutes
- Reference projects related to GenAI
- Significance of client training in AI-related services
- Focus on medium-sized and small accounts
- Corporate transparency
- Focus on the retail sector

- Significance of business consulting in AI-related services
- Focus on large accounts
- International presence (beyond Europe)

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.

PAC RADAR graph

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

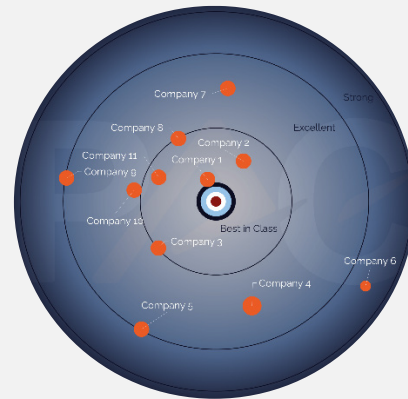The closer a company is to the center, the closer they are to meeting customers' requirements.

Fig. 7: PAC RADAR graph (exemplary presentation)

What is the PAC INNOVATION RADAR?

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, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources

PAC INNOVATION RADAR graph

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.
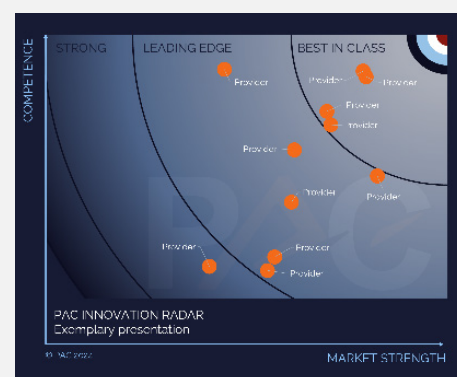

Fig. 8: PAC INNOVATION RADAR graph (exemplary presentation)

DEFINITIONS & SEGMENTATION

AI-related Services

PAC is going to evaluate providers of **AI-related services in Europe, France, and Germany** in different PAC AI INNOVATION RADAR analyses, each of which emphasizes the implementation of AI use cases – based on common AI fundamentals and frameworks – **in different lines of business.**

AI-related services as considered in this PAC INNOVATION RADAR analysis include:

- **AI-related consulting services** (business consulting/IT consulting; feasibility studies, planning, specification, and design; the audit of system infrastructures, the selection of technologies and solutions, business process reengineering [BPR], and change management).

- **AI solution implementation and integration** (implementation services and the integration of AI solutions with the existing software and services infrastructure and with other AI solutions where applicable, software development, testing, training, etc.).

- The assessment takes into account the **operation of AI solutions** (hosting/managed services), i.e., services that are needed to implement/deploy **AI-related use cases** in the above-mentioned lines of business.

- The assessment considers but does not focus on **BPO services.** PAC only considers processes that are to a significant degree supported by IT (e.g., accounting, human resources, logistics, procurement, etc.).

It will not be the AI platforms that are assessed, but the **ecosystem services** that provide support to corporate clients with the implementation of AI solutions, from the initial development of an AI strategy and the identification of use cases to the implementation, integration, and management of AI solutions.
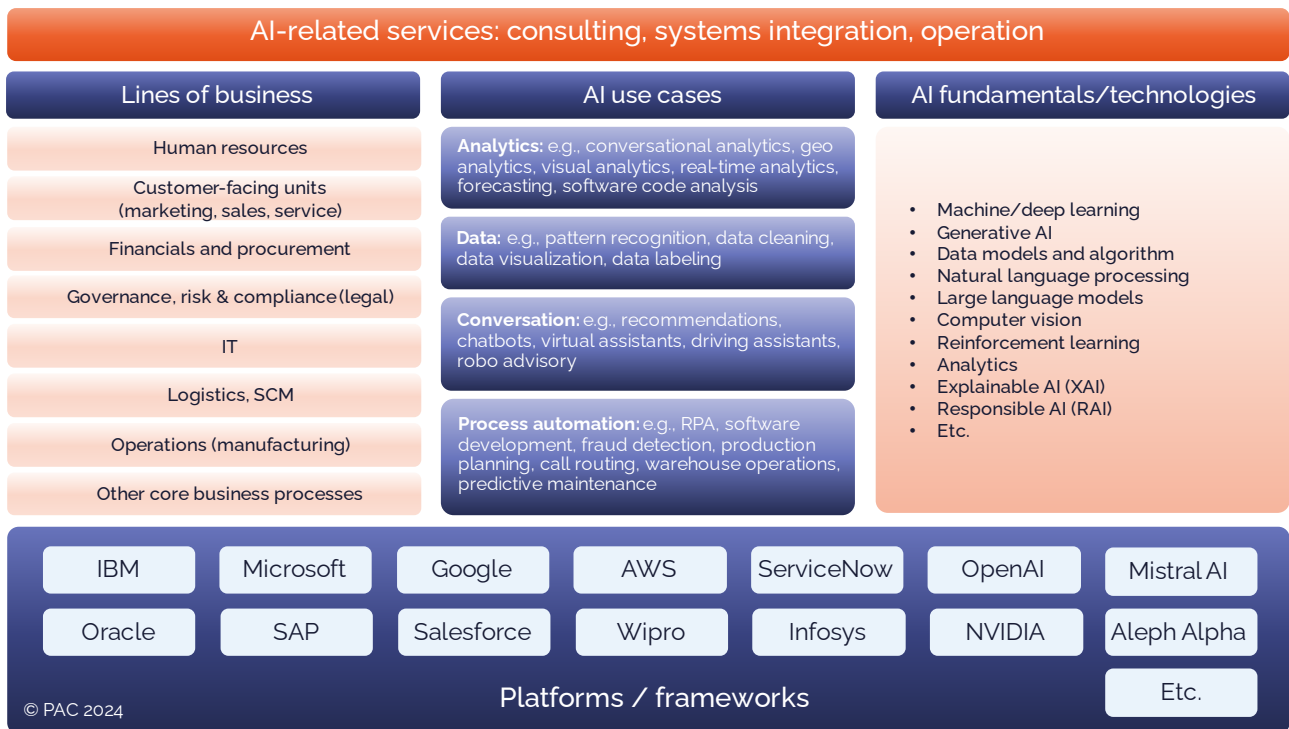

Fig. 9: AI-related Services segmentation

Segmentation

PAC is going to evaluate providers of AI-related services in Europe, France, and Germany in several PAC INNOVATION RADAR analyses, which are dedicated to specific line-of-business requirements:

- PAC INNOVATION RADAR AI-related Services in **Europe**
- PAC INNOVATION RADAR AI-related Services in **France**
- PAC INNOVATION RADAR AI-related Services in **Germany**
- PAC INNOVATION RADAR **GenAI-related** Services
- PAC INNOVATION RADAR AI-related Services for **Human Capital Management**
- PAC INNOVATION RADAR AI-related Services for **Digital Customer Engagement**
- PAC INNOVATION RADAR AI-related Services for **Back-Office Workflows**
- PAC INNOVATION RADAR AI-related Services for **Production**
- PAC INNOVATION RADAR AI-related Services for **Supply Chain Management and Logistics**
- PAC INNOVATION RADAR AI-related Services for **IT Operations**
- PAC INNOVATION RADAR AI-related Services for the **German Mittelstand**

Depending on their specific focus, the providers will be positioned in one or more of our PAC INNOVATION RADAR analyses.

Generative AI (GenAI) is a form of artificial intelligence that can generate content, such as text, images or software code. Based on these capabilities, GenAI can also perform non-critical, repeatable tasks.

HCM: Human resources (HR) refers to all processes in HR departments, e.g., digital personnel file, leave & attendance management, payroll, etc. HCM goes beyond HR as it covers all employee-related topics, from recruitment (including job application processes and related services) to retirement.

Digital Customer Engagement is the process of services and employees interacting with customers/clients/citizens through online and physical digital channels. This is supported by various back-end technology solutions and services spanning sales, commerce, marketing, content, customer experience, and customer service.

Back-Office Workflows include:

- corporate back-office processes, such as **financial**/cost/group accounting, controlling, financial risk management, and treasury.
- **Procurement,** or supplier relationship management (SRM), helps companies better manage the strategic buying process, be it materials, services, or goods.
- **GRC:** Governance refers to binding principles (laws, norms, and standards) and company-specific principles (e.g., transparency, equality, etc.). Risk means enterprise risk management (which includes all required methods and processes). Compliance refers to the implementation of relevant processes, methods, reporting, and controlling.

Production refers to all manufacturing processes in industrial companies (discrete manufacturing, process industry, automotive). This includes production planning, production and warehouse operations, quality control processes, and maintenance and repair operations.

SCM/Logistics refers to all the processes related to the flow of goods and services. This includes, e.g., inventory optimization, forecasting and demand planning, warehouse management, transportation management, asset management, etc.

IT Operations comprises all processes for the operation and further development of internal IT. This includes tasks such as security, maintenance, updates, service management, and admin processes.

German Mittelstand: medium-sized German companies, with up to 10,000 employees

PAC RADAR EVALUATION METHOD

Provider selection & participation

What 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 participate actively?

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.
- 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 by segment

Leaders in AI-related Services in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services in Germany 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Infosys
- Lufthansa Industry Solutions
- Materna
- NTT DATA
- Orange Business
- Reply
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services in France 2024

- Accenture
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Magellan Partners
- NTT DATA
- Orange Business
- Sopra Steria
- T-Systems
- TCS
- Wavestone
- Wipro

Leaders in GenAI-related Services in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services for HCM in Europe 2024

- Accenture
- Adesso
- Atos
- Capgemini
- CGI
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Magellan Partners
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Wipro

Leaders in AI-related Services for DCE in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services for Back-Office Workflows in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services for Production in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wipro

Leaders in AI-related Services for SCM in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services for IT Ops in Europe 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Capgemini
- CGI
- Devoteam
- DXC Technology
- IBM
- Inetum
- Infosys
- JEMS Group
- Keyrus
- Lufthansa Industry Solutions
- Magellan Partners
- Materna
- NTT DATA
- Orange Business
- Sopra Steria
- Stefanini
- T-Systems
- TCS
- Valantic
- Wavestone
- Wipro

Leaders in AI-related Services for the German Mittelstand 2024

- Accenture
- Adesso
- Alexander Thamm
- Arvato Systems
- Atos
- Lufthansa Industry Solutions
- Materna
- NTT DATA
- Reply
- Sopra Steria
- Stefanini
- T-Systems
- Valantic
- Wavestone

The concept

Evaluation of criteria at cluster level
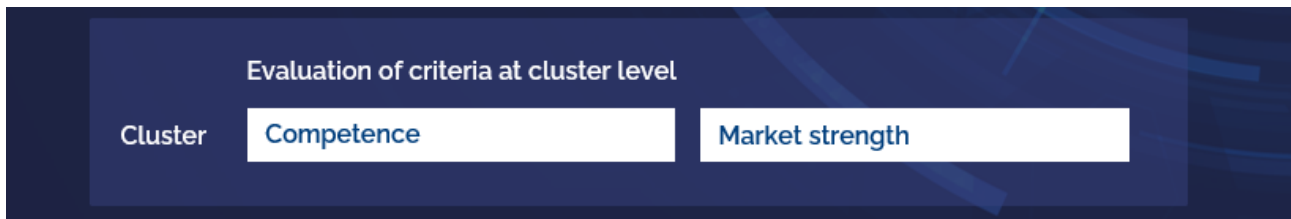
| Cluster | Competence | Market strength |

Fig. 10: PAC RADAR – evaluation method

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:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

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;

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 is published.

The evaluation may not be directly comparable with that of any previous version due to subsequent content modifications. In particular, it does 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;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

Evaluation criteria

General criteria

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General criteria
(considered at a European level to varying extents for several RADARs

</div>

Competence

- Dedicated organizational structures for AI-related services
- History in AI-related services in Europe
- History in AI-related services in France
- History in AI-related services in Germany
- Experience through internal AI usage
- Focus on AI-related services
- Extended services portfolio (complementing AI-related services)
- Investment in assets (IP, tools, solutions, methods, etc.)
- Investment in AI-related M&A or startups
- Investment in AI skills (training, certifications, etc.; status quo & plans)
- Coverage of common AI platforms
- Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)
- Cooperation with research institutes
- Coverage of GenAI platforms
- Coverage of hyperscaler platforms
- Relevance of human capital management processes in AI-related services
- Relevance of digital customer engagement in AI-related services
- Relevance of back-office workflows in AI-related services
- Relevance of production processes in AI-related services
- Relevance of supply chain management and logistics in AI-related services
- Relevance of IT operations processes in AI-related services
- Overall expertise in human capital management processes (competencies and experience)
- Overall expertise in digital customer engagement (competencies and experience)
- Overall expertise in back-office workflows (competencies and experience)
- Overall expertise in Production (competencies and experience)
- Overall expertise in supply chain management and logistics (competencies and experience)
- Overall expertise in IT operations (competencies and experience)
- Corporate transparency
- Focus on the manufacturing sector
- Focus on the public sector
- Focus on the financial services sector
- Focus on the retail sector
- Focus on the services sector (telecom, utilities, professional services, transport)

Market Strength

- Significance of operations in AI-related services
- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- AI employees in France
- AI employees in Germany
- Access to global delivery resources (nearshore and offshore)
- Reference projects in human capital management
- Reference projects in digital customer engagement
- Reference projects in back-office workflows
- Reference projects in production
- Reference projects in supply chain management and logistics
- Reference projects in IT operations
- Reference projects related to GenAI
- Significance of client training in AI-related services
- Focus on large accounts
- International presence (beyond Europe)
- Focus on medium-sized and small accounts
- Focus on the European market
- Focus on the French market
- Focus on the German market

AI-related Services

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AI-related Services in Europe
Dedicated criteria / criteria with higher weighting
</div>

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- Access to global delivery resources (nearshore and offshore)
- History in AI-related services in Europe
- Experience through internal AI usage
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)
- Cooperation with research institutes
- Coverage of GenAI platforms
- Coverage of hyperscaler platforms
- Reference projects related to GenAI
- Focus on the European market

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AI-related Services in France
Dedicated criteria / criteria with higher weighting
</div>

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- AI employees in France
- History in AI-related services in France
- Experience through internal AI usage
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Sovereign AI approaches (incl. data transparency, open source, regional hosting, etc.)
- Cooperation with research institutes
- Coverage of GenAI platforms
- Coverage of hyperscaler platforms
- Reference projects related to GenAI
- Focus on the French market

GenAI-related Services in Europe

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Dedicated criteria / criteria with higher weighting
</div>

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- Access to global delivery resources (nearshore and offshore)
- Experience through internal AI usage
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Cooperation with research institutes
- Coverage of GenAI platforms
- Coverage of hyperscaler platforms
- Reference projects related to GenAI
- Focus on the European market

AI-related Services for Digital Customer Engagement in Europe

Dedicated criteria / criteria with higher weighting

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- Access to global delivery resources (nearshore and offshore)
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Relevance of digital customer engagement in AI-related services
- Reference projects in digital customer engagement
- Overall expertise in digital customer engagement (competencies and experience)
- Reference projects related to GenAI
- Focus on the European market

AI-related Services for Production in Europe

Dedicated criteria / criteria with higher weighting

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- Access to global delivery resources (nearshore and offshore)
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Relevance of production processes in AI-related services
- Reference projects in production
- Overall expertise in production (competencies and experience)
- Reference projects related to GenAI
- Focus on the European market
- Focus on the manufacturing sector

AI-related Services for Supply Chain Management in Europe

Dedicated criteria / criteria with higher weighting

- Significance of IT consulting in AI-related services
- Significance of systems integration in AI-related services
- Significance of business consulting in AI-related services
- AI employees in Europe
- Access to global delivery resources (nearshore and offshore)
- Focus on AI-related services
- Investment in assets (IP, tools, solutions, methods, etc.)
- Coverage of common AI platforms
- Relevance of supply chain management and logistics in AI-related services
- Reference projects in supply chain management and logistics
- Overall expertise in supply chain management and logistics (competencies and experience)
- Reference projects related to GenAI
- Focus on the European market
- Focus on the manufacturing sector
- Focus on the retail sector

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RADAR

ABOUT THE PAC RADAR

ABOUT PAC

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