



Sustainability & CSR | Europe | 2024

# Leaders in Sustainability-related IT Consulting & Services in Europe

SITSI® | Vendor Analysis | PAC INNOVATION RADAR

The background of the slide is a composite image. The top half shows a glowing, digital-style globe with blue and white lines, set against a dark blue background with faint circuit-like patterns. The bottom half shows a grayscale image of wind turbines, with one prominent turbine in the foreground on the left and others receding into the distance.

Europe  
Germany  
UK  
Sustainability of IT  
Sustainability through IT  
Sustainable Supply Chain  
Sustainability Reporting  
Sustainability Empowerment  
– Consolidated –

## Positioning of NTT DATA

# TABLE OF CONTENTS

Introduction.....	4
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024” .....	5
Review of Top-Seeded Provider NTT DATA.....	6
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT” .....	7
Review of Top-Seeded Provider NTT DATA.....	8
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT” .....	9
Review of Top-Seeded Provider NTT DATA.....	10
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain” .....	11
Review of Top-Seeded Provider NTT DATA.....	12
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting” .....	13
Review of Top-Seeded Provider NTT DATA.....	14
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment” .....	15
Review of Top-Seeded Provider NTT DATA.....	16
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Germany 2024” .....	17
Review of Top-Seeded Provider NTT DATA.....	18
PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in the UK 2024” .....	19
Review of TOP-Seeded Providers NTT DATA.....	20
Appendix.....	21
The PAC (INNOVATION) RADAR.....	21
Background & scope .....	21
Definitions .....	22
Provider selection and participation .....	24
Considered providers by segment.....	25
Evaluation method and criteria.....	26
PAC RADAR Report License .....	31
About the PAC RADAR .....	32
About PAC.....	32

## TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024” .....	5
Fig. 2: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT” .....	7
Fig. 3: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT” .....	9
Fig. 4: PAC INNOVATION RADAR Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain” .....	11
Fig. 5: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting” .....	13
Fig. 6: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment” .....	15
Fig. 7: PAC INNOVATION RADAR Leaders in Sustainability-related IT Consulting & Services in Germany 2024” .....	17
Fig. 8: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in the UK 2024” .....	19
Fig. 9: Definitions.....	22
Fig. 10: PAC RADAR series “Sustainability-related IT Consulting & Services” .....	23
Fig. 11: PAC INNOVATION RADAR graph (example) .....	26

## DOCUMENT INFORMATION

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## 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.

European lawmakers are currently reforming the sustainability reporting requirements for companies and are planning to significantly **extend the transparency obligations** they are subject to. Some of them are the following:

- On January 5, 2023, the **Corporate Sustainability Reporting Directive (CSRD)** entered into force and replaced the **Non-Financial Reporting Directive (NFRD)**. CSRD also enlarges the scope of companies falling under the sustainability reporting requirements from approx. 12,000 to around 50,000 in the EU. The CSRD and EU Taxonomy represent over 3,700 data points that need to be reported, derived from a wide variety of sources.
- On December 14, 2023, the Council and the European Parliament reached a provisional deal on the **Corporate Sustainability Due Diligence Directive (CSDDD)**. This directive, if adopted, would require companies to establish due diligence procedures to address adverse impacts of their actions on human rights and the environment, including along their value chains in the EU and globally.
- An attempt to standardize reporting by the EU is another mandatory set of disclosure standards known as the **European Sustainability Reporting Standards (ESRS)**. These are currently under development, yet according to the final draft, the standards contain 84 disclosure requirements, or approximately 1,200 data points that must be reported.

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 stakeholders in an automated way.

### Sustainability-related IT consulting & services

In this context, nearly all leading IT service providers have not only made efforts to address sustainability internally by reducing their own carbon footprint but also in their day-to-day business. To be more precise, they have been developing and launching dedicated offerings to support their customers in the definition, monitoring, and achievement of their sustainability goals.

There are many approaches to increasing ecological sustainability which 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. Customers' drivers to invest in sustainability range from implementing the most necessary reporting requirements (regulation-driven) to comprehensive business transformation aimed at positioning sustainability as a competitive advantage (value-driven). This in turn requires explicit competencies from IT service providers.

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.

Against this background, we evaluated the most convincing approaches in the face of rising demand, and positioned the leading providers in a PAC INNOVATION RADAR series on "Sustainability-related IT Consulting & Services in Europe 2024". A total of 22 IT service providers considered relevant for the industry have been analyzed for their specific strengths and weaknesses based on numerous defined criteria. The results have been published in nine 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.

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024”

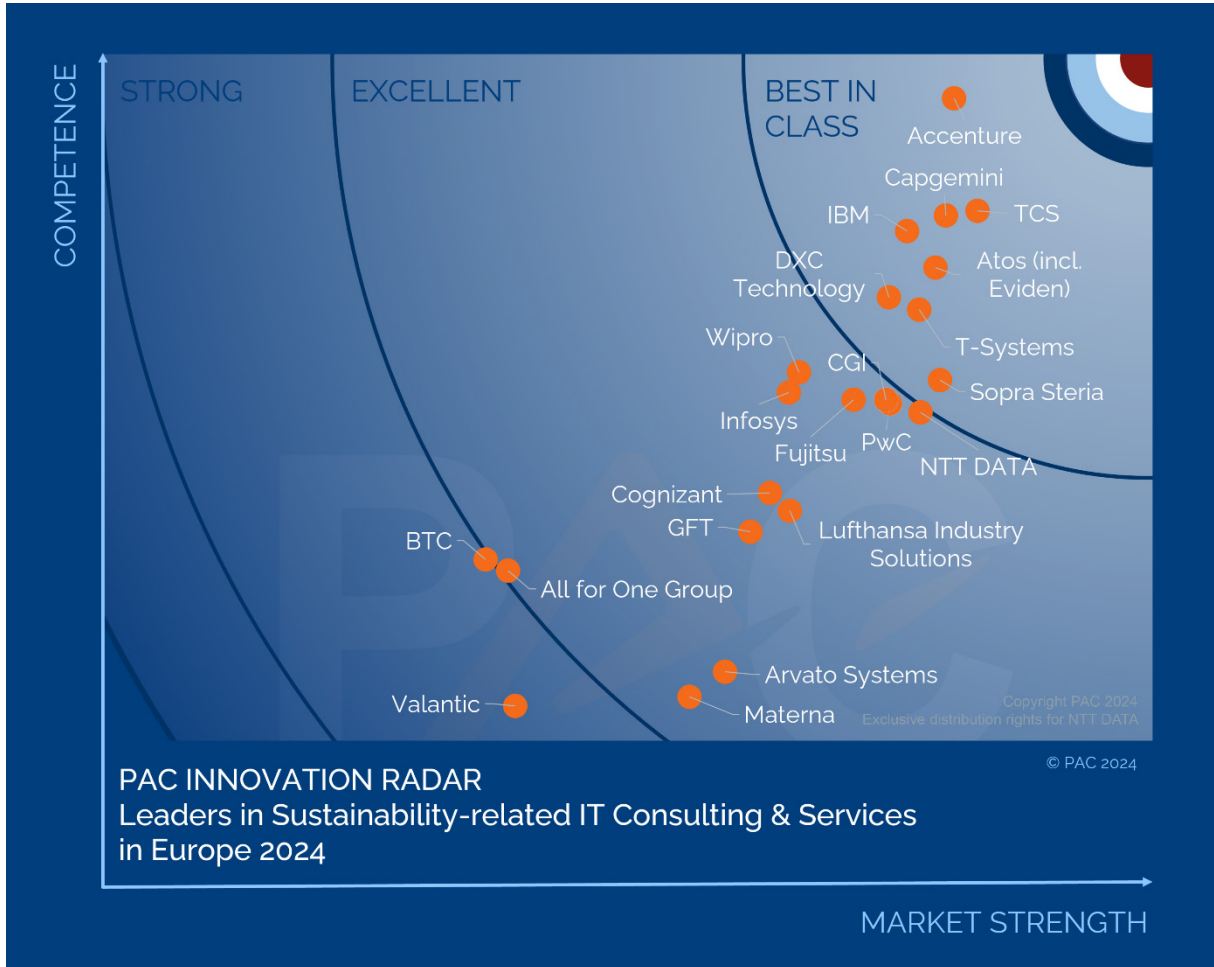


Fig. 1: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Europe 2024"

Excellent

Cluster	Average	NTT DATA
Market strength	2.18	1.79
Competence	2.20	2.14
<b>Total score</b>	<b>2.19</b>	<b>2.02</b>

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

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)

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

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024: SUSTAINABILITY OF IT”

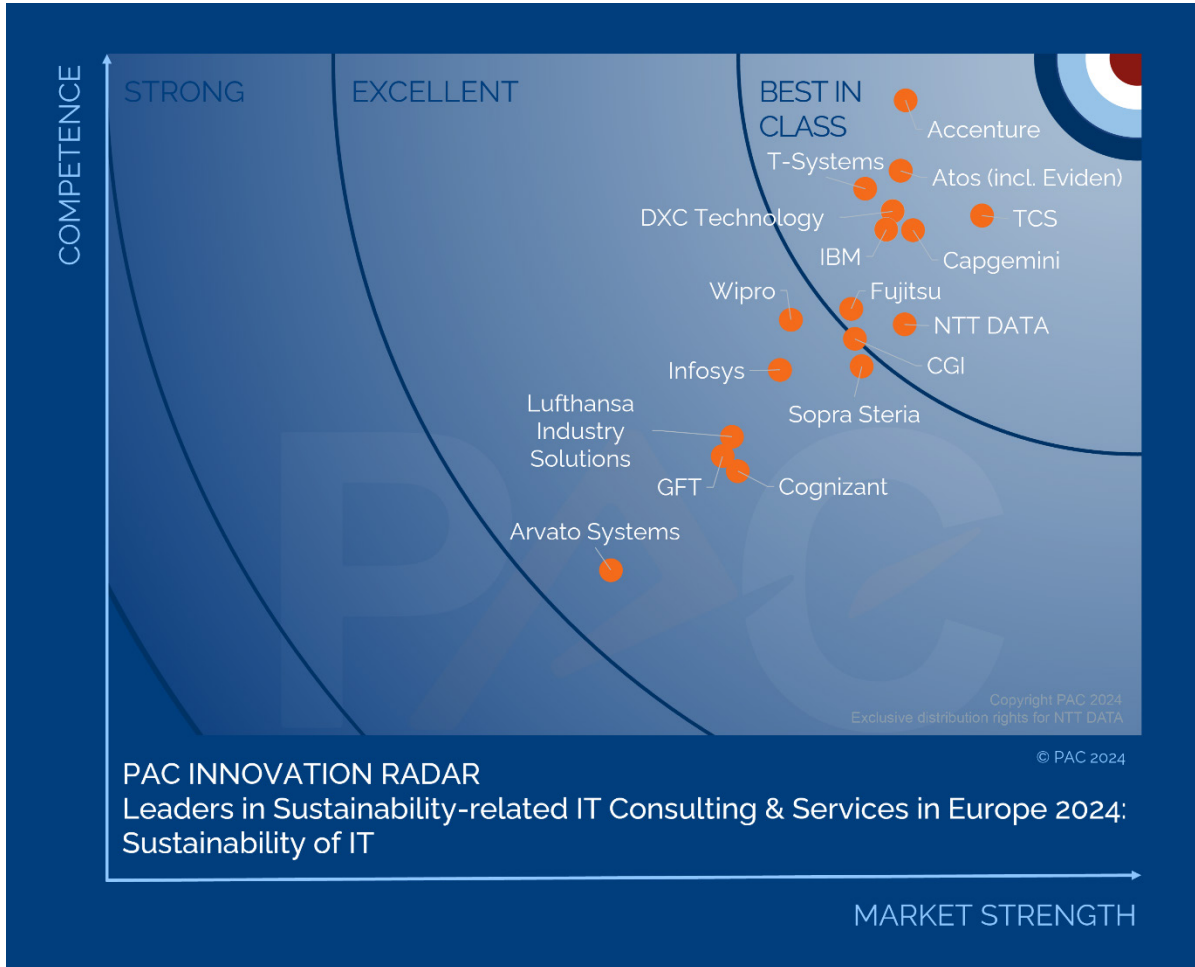


Fig. 2: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT”

Best in Class

Cluster	Average	NTT DATA
Market strength	2.27	1.82
Competence	2.16	1.94
<b>Total score</b>	<b>2.20</b>	<b>1.89</b>

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)
- n/a



# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024: SUSTAINABILITY THROUGH IT”

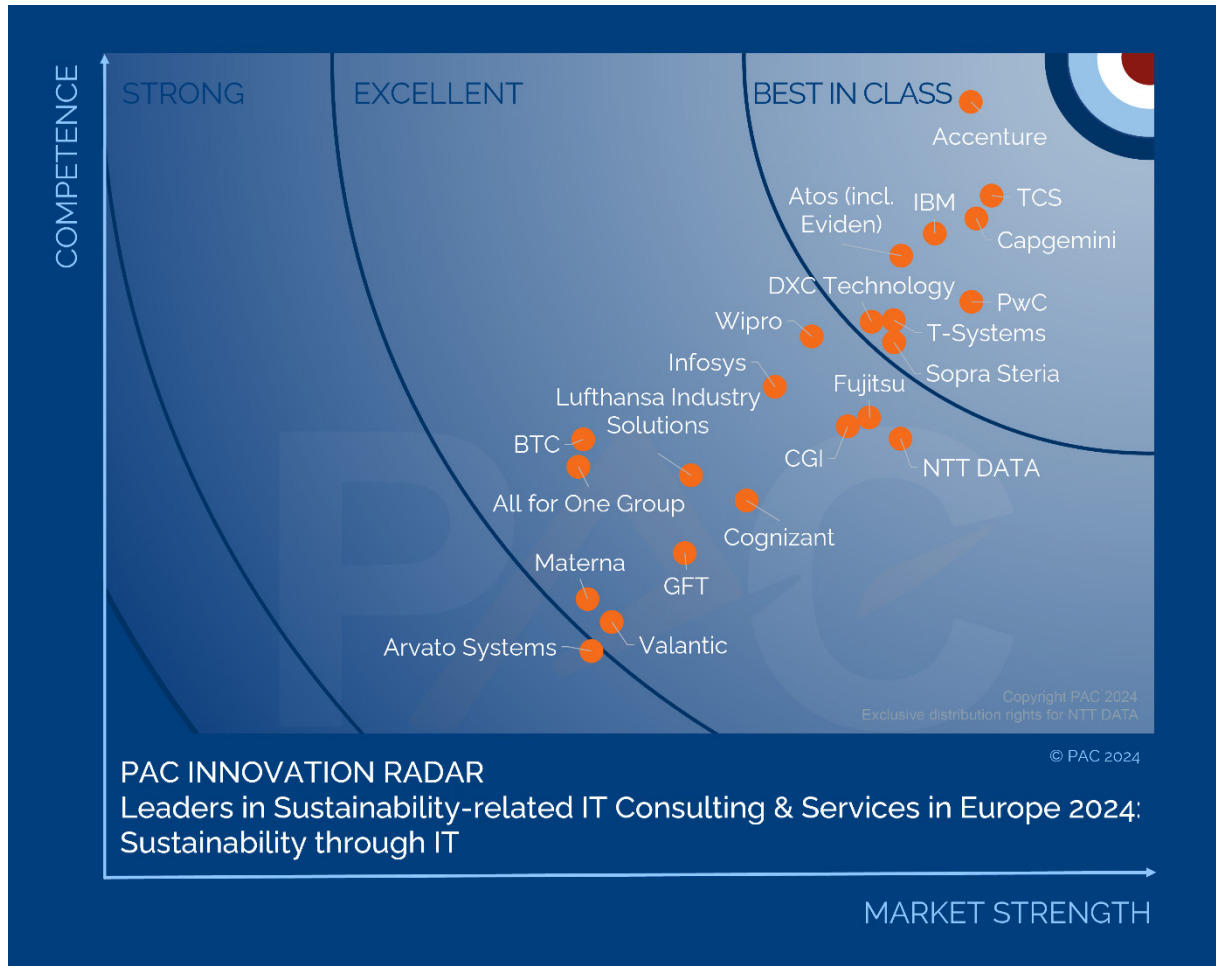


Fig. 3: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT”

Excellent

Cluster	Average	NTT DATA
Market strength	2.21	1.85
Competence	2.19	2.34
<b>Total score</b>	<b>2.20</b>	<b>2.19</b>

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

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)

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

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024: SUSTAINABLE SUPPLY CHAIN”

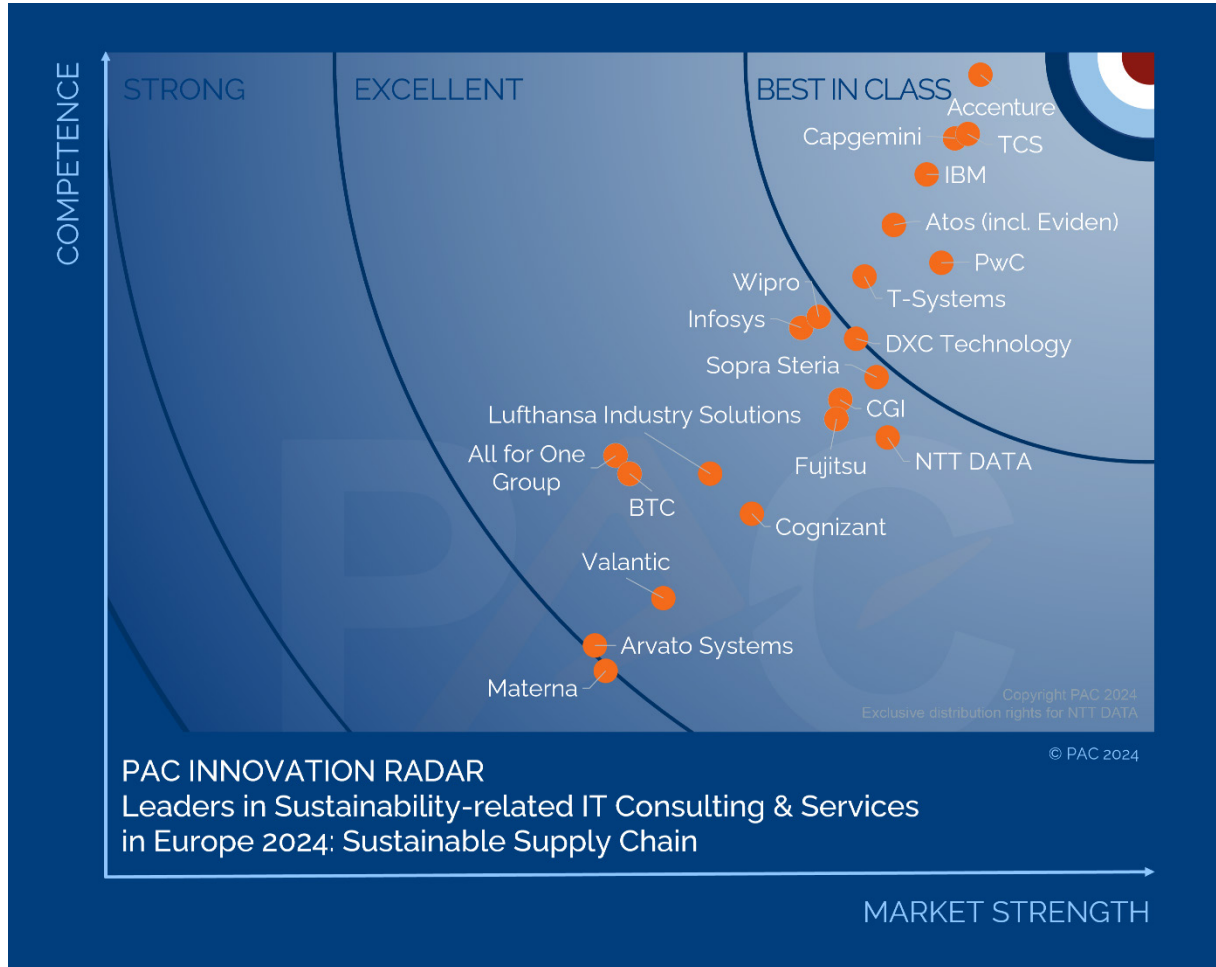


Fig. 4: PAC INNOVATION RADAR Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain”

Excellent

Cluster	Average	NTT DATA
Market strength	2.22	1.89
Competence	2.15	2.29
<b>Total score</b>	<b>2.16</b>	<b>2.19</b>

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)
- n/a

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024: SUSTAINABILITY REPORTING”

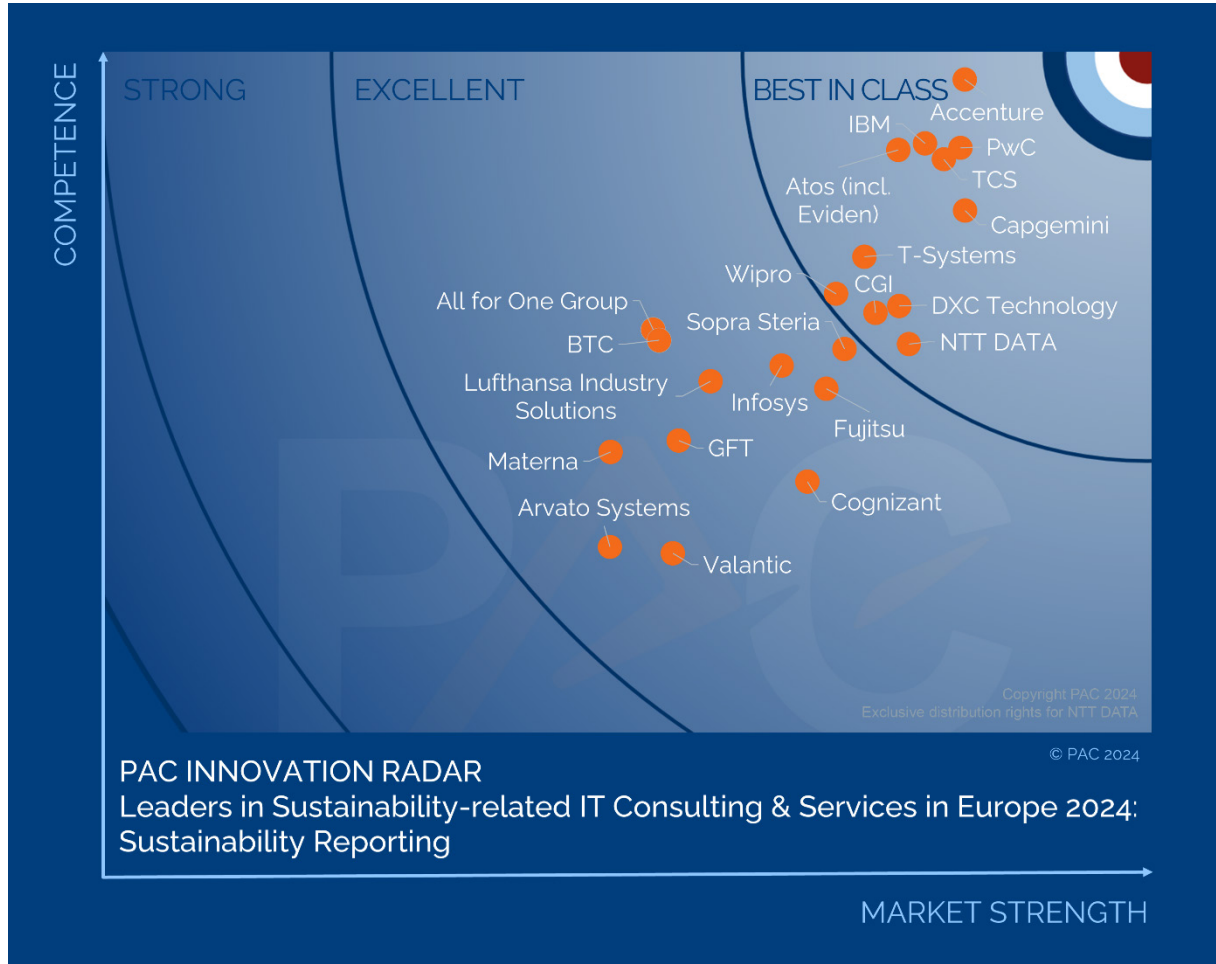


Fig. 5: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting”

Best in Class

Cluster	Average	NTT DATA
Market strength	2.21	1.81
Competence	1.95	1.98
<b>Total score</b>	<b>2.03</b>	<b>1.93</b>

Criteria rated significantly ABOVE AVERAGE (more than 0.75)

- Resources: homogeneous on-site presence across countries (in Europe)

Criteria rated significantly BELOW AVERAGE (more than 0.75)

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance)

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN EUROPE 2024: SUSTAINABILITY EMPOWERMENT”

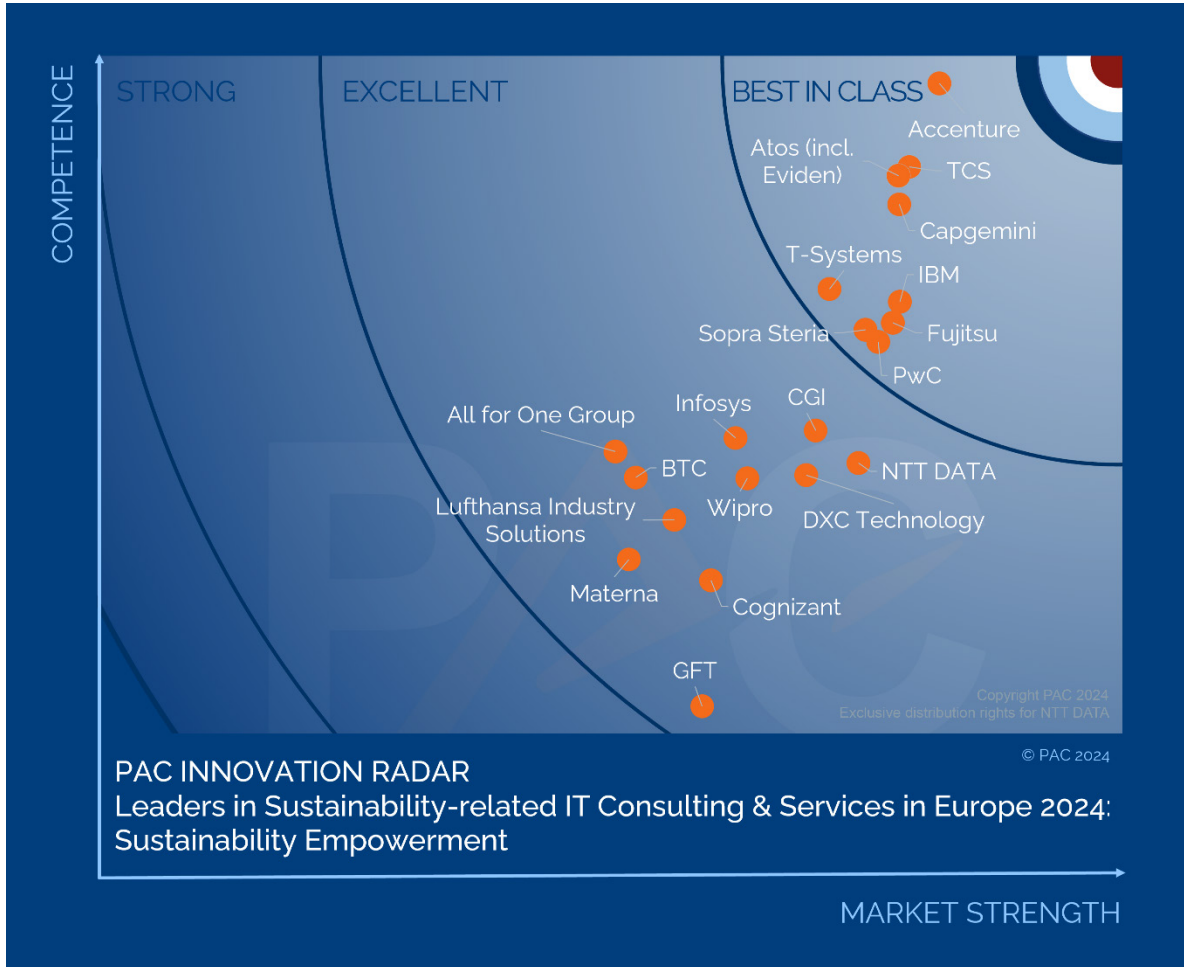


Fig. 6: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment”

Excellent

Cluster	Average	NTT DATA
Market strength	2.21	1.89
Competence	2.26	2.35
<b>Total score</b>	<b>2.25</b>	<b>2.23</b>

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

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)

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

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance



# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN GERMANY 2024”

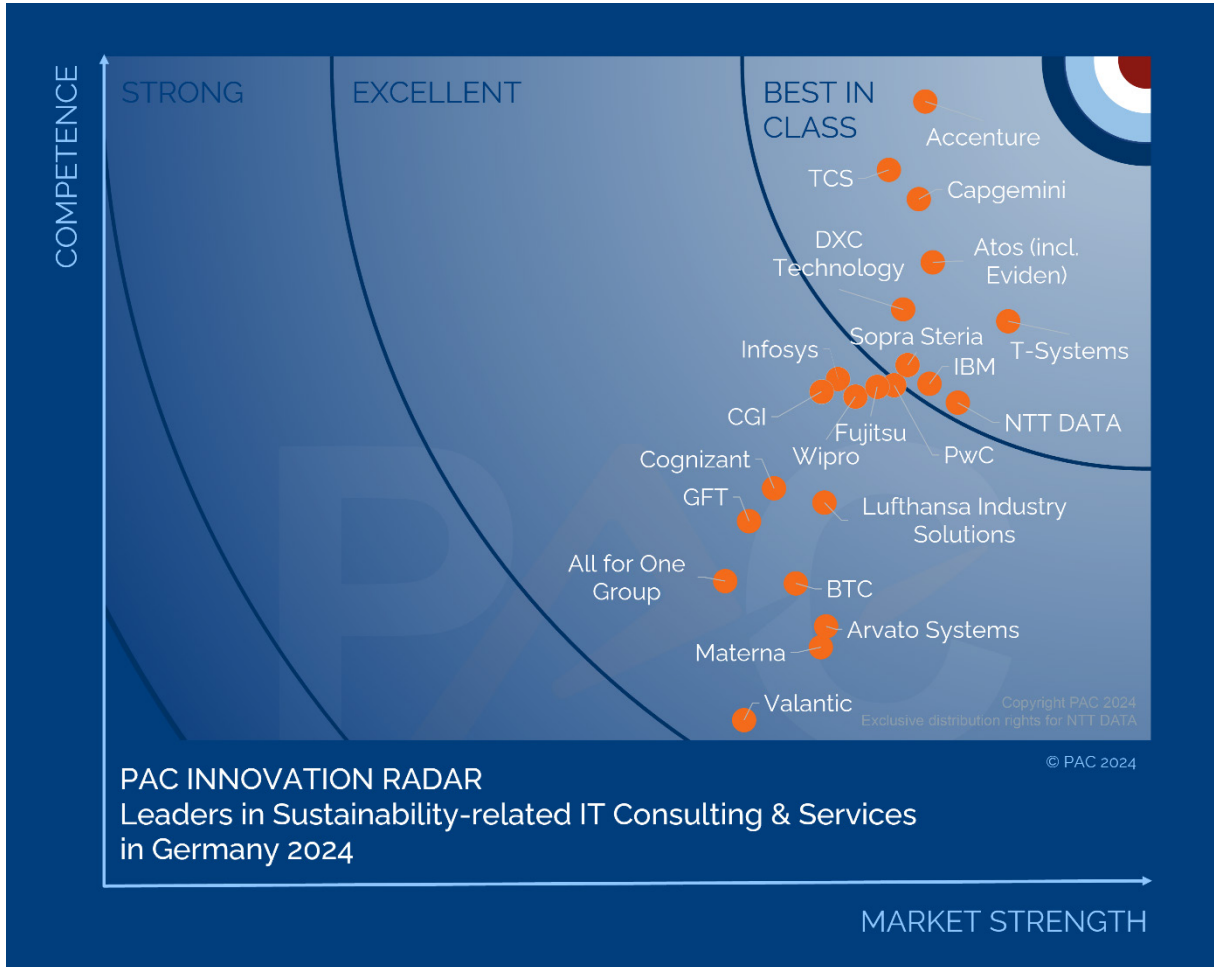


Fig. 7: PAC INNOVATION RADAR Leaders in Sustainability-related IT Consulting & Services in Germany 2024”

## REVIEW OF TOP-SEEDED PROVIDER NTT DATA

PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in Germany 2024"

Best in Class

Cluster	Average	NTT DATA
Market strength	2.01	1.77
Competence	2.20	2.14
<b>Total score</b>	<b>2.11</b>	<b>1.97</b>

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

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)

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

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance

# PAC INNOVATION RADAR “LEADERS IN SUSTAINABILITY-RELATED IT CONSULTING & SERVICES IN THE UK 2024”

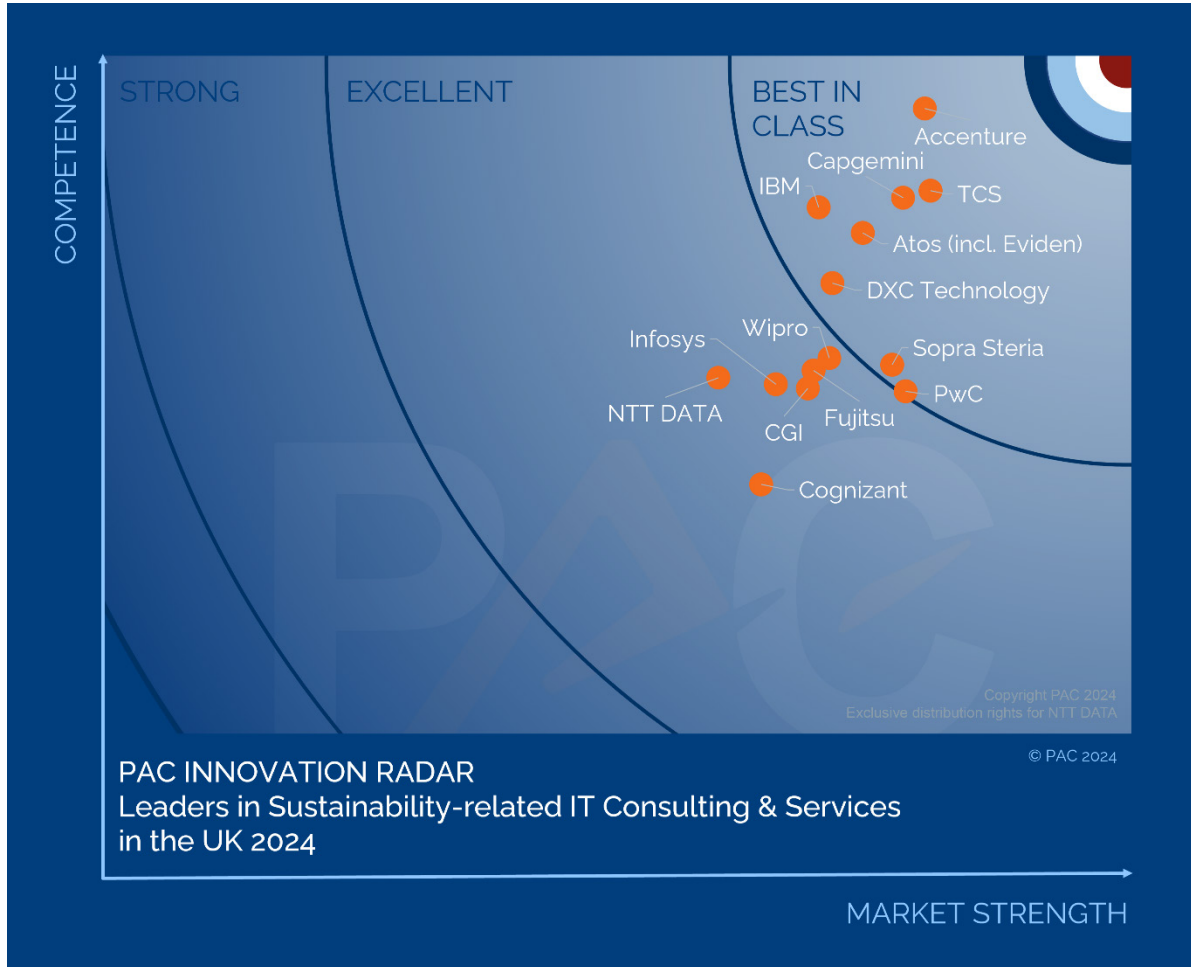


Fig. 8: PAC INNOVATION RADAR “Leaders in Sustainability-related IT Consulting & Services in the UK 2024”

## REVIEW OF TOP-SEEDED PROVIDERS NTT DATA

PAC INNOVATION RADAR "Leaders in Sustainability-related IT Consulting & Services in the UK 2024"

Excellent

Cluster	Average	NTT DATA
Market strength	2.32	2.50
Competence	2.20	2.14
<b>Total score</b>	<b>2.25</b>	<b>2.31</b>

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

- Consulting & services related to transforming/creating sustainable products
- Resources: homogeneous on-site presence across countries (in Europe)

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

- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance
- General strength on the UK market

## APPENDIX

### The PAC (INNOVATION) 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.

### Background & scope

**Ecological sustainability**, as part of omnipresent Environmental, Social, and Governance (ESG) regulations and strategies, is one of the emerging topics on the software & IT services (SITS) market, and an

increasingly important selection criterion when choosing an IT provider.

Accordingly, **all leading IT consultants and service providers** have not only been making efforts to decrease their own carbon footprint and impact on the environment, but they have also been developing dedicated portfolios to help their clients monitor and reach their overall sustainability targets.

Against this background, PAC will analyze the provider landscape in Europe, evaluate the most convincing approaches in the face of rising demand, and position the leading providers in a PAC INNOVATION RADAR series on **"Sustainability-related IT Consulting & Services in Europe"**.

This PAC INNOVATION RADAR series focuses on the portfolio development, visions, strategies, approaches, tools, and investments of IT consulting and service providers aiming to support their clients with the definition, monitoring, and achievement of their sustainability goals.

Organizations' sustainability goals can be reached through the intelligent use of IT (**sustainability through IT**) whereas their own IT has to become more sustainable (**sustainability of IT**). Both aspects will be covered in dedicated PAC INNOVATION RADARs.

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.

The **overall geographic scope** is Europe. In addition, PAC will publish dedicated RADARs for Germany, France and the UK. PAC will consider local projects in individual countries as well as multinational engagements across Europe.

Approaches towards 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	Operations
Strategy	Company strategy (regarding sustainability)	Strategy Consulting (target definition, transformation, reporting, etc.)	
Business Processes	Business processes & work environment (impact on/of sustainability targets)	Process Consulting, Transformation	Business Process Outsourcing (BPO)
Applications	Infrastructure software, application software, embedded software	Consulting & Transformation (implementation, development, integration, migration, etc.)	Application Management, Hosting
Infrastructure	Server, storage, networking, etc.; data center, devices, cloud, edge, etc.	Consulting & Transformation (rollout, consolidation, migration, automation, etc.)	Managed Services, Hosting

**Focus:** IT consulting and services aimed at supporting client organizations with the definition, monitoring, achievement, and reporting of their sustainability goals

**Peripheral aspect:** internal measures taken by the providers that aim at reaching their own sustainability targets

Fig. 9: 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.

PAC is going to evaluate the providers of **Sustainability-related Consulting & Services** in Europe in various PAC INNOVATION RADAR segments dedicated to specific use cases, focus areas, and customer groups:



Fig. 10: PAC RADAR series "Sustainability-related IT Consulting & Services"

## Provider selection and participation

### Which providers are positioned in the PAC INNOVATION 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 compelling vision.

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 INNOVATION RADAR analysis?

The decision as to which providers are considered in the PAC INNOVATION 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 INNOVATION 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 INNOVATION 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 INNOVATION 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 Sustainability-related IT Consulting & Services in Europe 2024	Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT	Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT	Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain
Accenture	Accenture	Accenture	Accenture
All for One Group	Arvato Systems	All for One Group	All for One Group
Arvato Systems	Atos (incl. Eviden)	Arvato Systems	Arvato Systems
Atos (incl. Eviden)	Capgemini	Atos (incl. Eviden)	Atos (incl. Eviden)
BTC	CGI	BTC	BTC
Capgemini	Cognizant	Capgemini	Capgemini
CGI	DXC Technology	CGI	CGI
Cognizant	Fujitsu	Cognizant	Cognizant
DXC Technology	GFT	DXC Technology	DXC Technology
Fujitsu	IBM	Fujitsu	Fujitsu
GFT	Infosys	GFT	IBM
IBM	Lufthansa Industry Solutions	IBM	Infosys
Infosys	NTT DATA	Infosys	Lufthansa Industry Solutions
Lufthansa Industry Solutions	Sopra Steria	Lufthansa Industry Solutions	Materna
Materna	T-Systems	Materna	NTT DATA
NTT DATA	TCS	NTT DATA	PwC
PwC	Wipro	PwC	Sopra Steria
Sopra Steria		Sopra Steria	T-Systems
T-Systems		T-Systems	TCS
TCS		TCS	Valantic
Valantic		Valantic	Wipro
Wipro		Wipro	

Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting	Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment	Leaders in Sustainability-related IT Consulting & Services in Germany 2024	Leaders in Sustainability-related IT Consulting & Services in the UK 2024	Leaders in Sustainability-related IT Consulting & Services in France 2024
Accenture	Accenture	Accenture	Accenture	Accenture
All for One Group	Adesso	All for One Group	Atos (incl. Eviden)	Atos (incl. Eviden)
Arvato Systems	All for One Group	Arvato Systems	Capgemini	Capgemini
Atos (incl. Eviden)	Atos (incl. Eviden)	Atos (incl. Eviden)	CGI	CGI
BTC	BTC	BTC	Cognizant	Cognizant
Capgemini	Capgemini	Capgemini	DXC Technology	DXC Technology
CGI	CGI	CGI	Fujitsu	IBM
Cognizant	Cognizant	Cognizant	IBM	Infosys
DXC Technology	DXC Technology	DXC Technology	Infosys	Sopra Steria
Fujitsu	Fujitsu	Fujitsu	NTT DATA	TCS
GFT	GFT	GFT	PwC	Wipro
IBM	IBM	IBM	Sopra Steria	
Infosys	Infosys	Infosys	TCS	
Lufthansa Industry Solutions	Lufthansa Industry Solutions	Lufthansa Industry Solutions	Wipro	
Materna	Materna	Materna		
NTT DATA	NTT DATA	NTT DATA		
PwC	PwC	PwC		
Sopra Steria	Sopra Steria	Sopra Steria		
T-Systems	T-Systems	T-Systems		
TCS	TCS	TCS		
Valantic	Wipro	Valantic		
Wipro		Wipro		

## Evaluation method and criteria

### Evaluation method

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

The assessment is based on:

- The provider's self-disclosure via questionnaire;
- A briefing call about the provider's organization, resources, approaches, portfolio, customer focus, customer references, investments, partnerships, certifications, etc.;
- If applicable, a poll among customers by PAC;
- 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, in particular 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 (INNOVATION) RADARs in which the provider participated;
- A poll among the provider's customers (as required) on their experiences and satisfaction.

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

Fig. 11: PAC INNOVATION RADAR graph (example)

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.

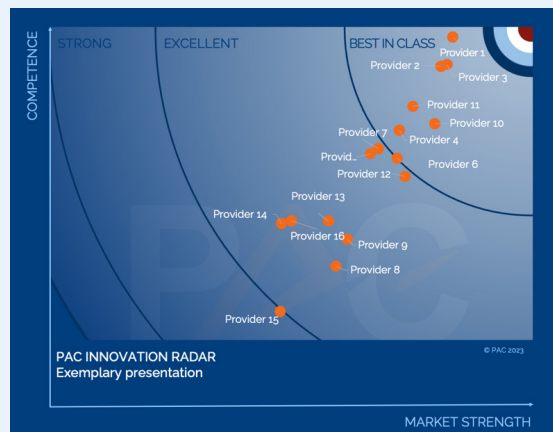
### Reissue of published RADARs

The assessments in the PAC INNOVATION RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC INNOVATION 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"> <li>- Strategy consulting related to sustainability</li> <li>- Consulting &amp; services related to digital solutions that measure and manage the environmental impact: production processes</li> <li>- Consulting &amp; services related to digital solutions that measure and manage the environmental impact: sustainable finance</li> <li>- Consulting &amp; services related to digital solutions that measure and manage the environmental impact: supply chain and logistics</li> <li>- Consulting &amp; services related to digital workplace and collaboration</li> <li>- Consulting &amp; services related to digital solutions that consolidate sustainability-related data and/or support external reporting</li> <li>- Support with the decarbonization of IT infrastructures</li> <li>- Support with the decarbonization of application landscapes</li> <li>- Sustainability empowerment of the client's organization</li> <li>- General strength in IT operations</li> <li>- Consulting &amp; services related to transforming/creating sustainable products</li> <li>- Portfolio: proprietary sustainability-related platform/software</li> <li>- Portfolio: dedicated sustainability-related services offering</li> <li>- Portfolio: sustainability-related services embedded in overall portfolio</li> <li>- Portfolio: maturity level</li> <li>- Anchoring of sustainability-related IT consulting &amp; services in the overall go-to-market</li> <li>- Vision &amp; strategy (clearly defined and KPI-anchored)</li> <li>- Resources: sustainability-related employees &amp; employee development (e.g., hiring, upskilling)</li> <li>- Sustainability-related ecosystem: partnerships with start-ups/specialists</li> <li>- General strength in analytics and data management</li> <li>- Corporate transparency</li> <li>- Competence and experience in supporting customers' financial reporting</li> </ul>
Cluster "Market strength"	<ul style="list-style-type: none"> <li>- Organizational anchoring of sustainability-related IT consulting &amp; services</li> <li>- Homogeneous vertical coverage</li> <li>- Focus on medium-sized and small accounts</li> <li>- Focus on large accounts</li> <li>- Investments in sustainability services-related assets (IP, tools, solutions, methods, R&amp;D, M&amp;A)</li> <li>- Overall commitment to sustainability (e.g., history, internal measures, business transformation)</li> <li>- Resources: homogeneous on-site presence across countries (in Europe)</li> <li>- Sustainability-related ecosystem: partnerships with large platform providers (e.g., SAP, Salesforce, ServiceNow, Microsoft, AWS, Google)</li> <li>- Breadth &amp; depth of available case studies - sustainability of IT</li> <li>- Breadth &amp; depth of available case studies - sustainability through IT</li> <li>- Volume of sustainability-related business</li> <li>- General strength on the German market</li> <li>- General strength on the EMEA market</li> <li>- General strength on the UK market</li> <li>- General strength on the French market</li> </ul>

Leaders in Sustainability-related IT Consulting & Services in Europe 2024

Dedicated criteria / criteria with higher weighting

- Consulting & services related to digital solutions that measure and manage the environmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance
- Consulting & services related to digital solutions that measure and manage the environmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-related data and/or support external reporting
- Support with the decarbonization of IT infrastructures
- Support with the decarbonization of application landscapes
- Breadth & depth of available case studies - sustainability of IT
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management
- General strength on the EMEA market

Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability of IT

Dedicated criteria / criteria with higher weighting

- Consulting & services related to digital workplace and collaboration
- Support with the decarbonization of IT infrastructures
- Support with the decarbonization of application landscapes
- Breadth & depth of available case studies - sustainability of IT

Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability through IT

Dedicated criteria / criteria with higher weighting

- Strategy consulting related to sustainability
- Consulting & services related to digital solutions that measure and manage the environmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the environmental impact: sustainable finance
- Consulting & services related to digital solutions that measure and manage the environmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-related data and/or support external reporting
- Sustainability empowerment of the client's organization
- Portfolio: dedicated sustainability-related services offering
- Investments in sustainability services-related assets (IP, tools, solutions, methods, R&D, M&A)
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management

### Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainable Supply Chain

Dedicated criteria / criteria with higher weighting

- Strategy consulting related to sustainability
- Consulting & services related to digital solutions that measure and manage the environmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the environmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-related data and/or support external reporting
- Sustainability empowerment of the client's organization
- Portfolio: dedicated sustainability-related services offering
- Investments in sustainability services-related assets (IP, tools, solutions, methods, R&D, M&A)
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management

### Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Reporting

Dedicated criteria / criteria with higher weighting

- Consulting & services related to digital solutions that consolidate sustainability-related data and/or support external reporting
- Portfolio: dedicated sustainability-related services offering
- 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
- General strength in analytics and data management
- Competence and experience in supporting customers' financial reporting

### Leaders in Sustainability-related IT Consulting & Services in Europe 2024: Sustainability Empowerment

Dedicated criteria / criteria with higher weighting

- Strategy consulting related to sustainability
- Consulting & services related to digital workplace and collaboration
- Sustainability empowerment of the client's organization
- Portfolio: dedicated sustainability-related services offering
- Investments in sustainability services-related assets (IP, tools, solutions, methods, R&D, M&A)

Leaders in Sustainability-related IT Consulting & Services  
in Germany 2024

Dedicated cri-  
teria / criteria  
with higher  
weighting

- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: sustainable finance
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-re-  
lated data and/or support external reporting
- Support with the decarbonization of IT infrastructures
- Support with the decarbonization of application landscapes
- Breadth & depth of available case studies - sustainability of IT
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management
- General strength on the German market

Leaders in Sustainability-related IT Consulting & Services  
in the UK 2024

Dedicated cri-  
teria / criteria  
with higher  
weighting

- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: sustainable finance
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-re-  
lated data and/or support external reporting
- Support with the decarbonization of IT infrastructures
- Support with the decarbonization of application landscapes
- Breadth & depth of available case studies - sustainability of IT
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management
- General strength on the UK market

Leaders in Sustainability-related IT Consulting & Services  
in France 2024

Dedicated cri-  
teria / criteria  
with higher  
weighting

- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: production processes
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: sustainable finance
- Consulting & services related to digital solutions that measure and manage the envi-  
ronmental impact: supply chain and logistics
- Consulting & services related to digital solutions that consolidate sustainability-re-  
lated data and/or support external reporting
- Support with the decarbonization of IT infrastructures
- Support with the decarbonization of application landscapes
- Breadth & depth of available case studies - sustainability of IT
- Breadth & depth of available case studies - sustainability through IT
- General strength in analytics and data management
- General strength on the French market

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