

THE REALITY OF HOW AI ADOPTION IS BEING SCALED ACROSS EUROPE

a PAC Webinar

 **October 24, 2024**



Your hosts for today



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AGENDA

1. The AI adoption journey
2. The role of data in scaling AI
3. Being responsible with AI
4. Explaining the outputs of AI
5. The reality of generative AI
6. **PAC Research Agenda 2025**
7. Q&A



1



The AI Adoption Journey

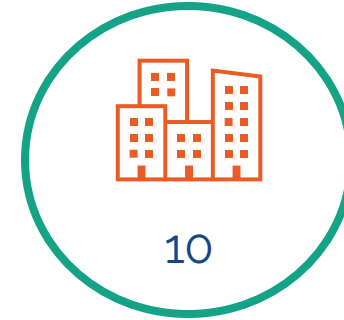
2024 European Scaling AI CxO Survey



550



5 countries
& 3 regions



10



Data



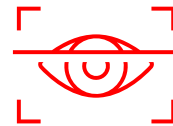
RAI



XAI



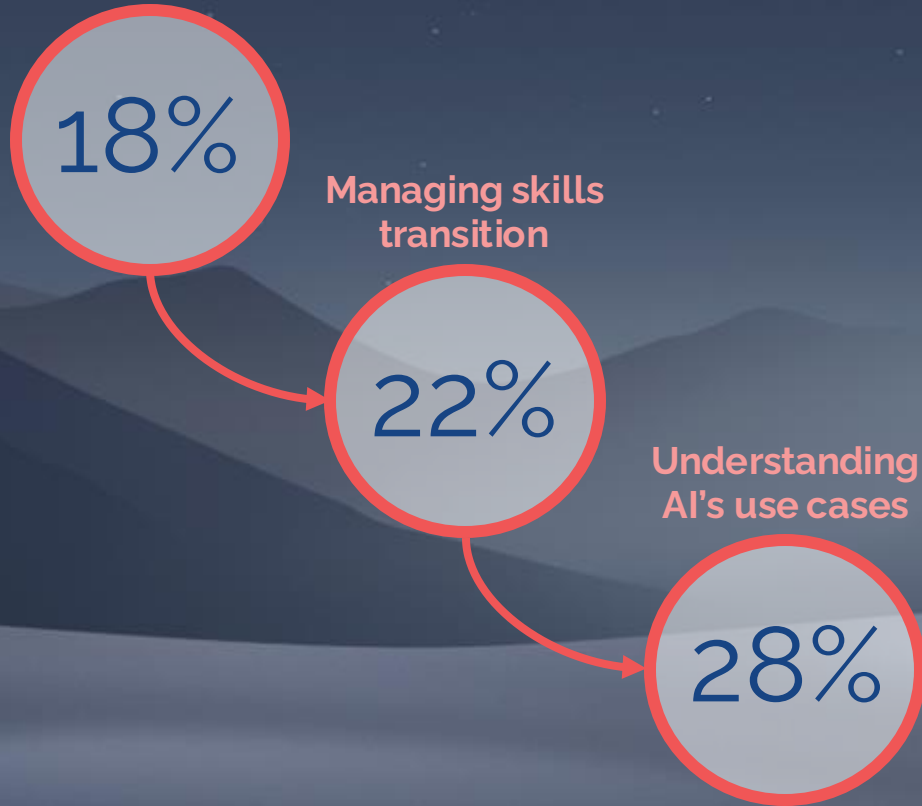
GenAI



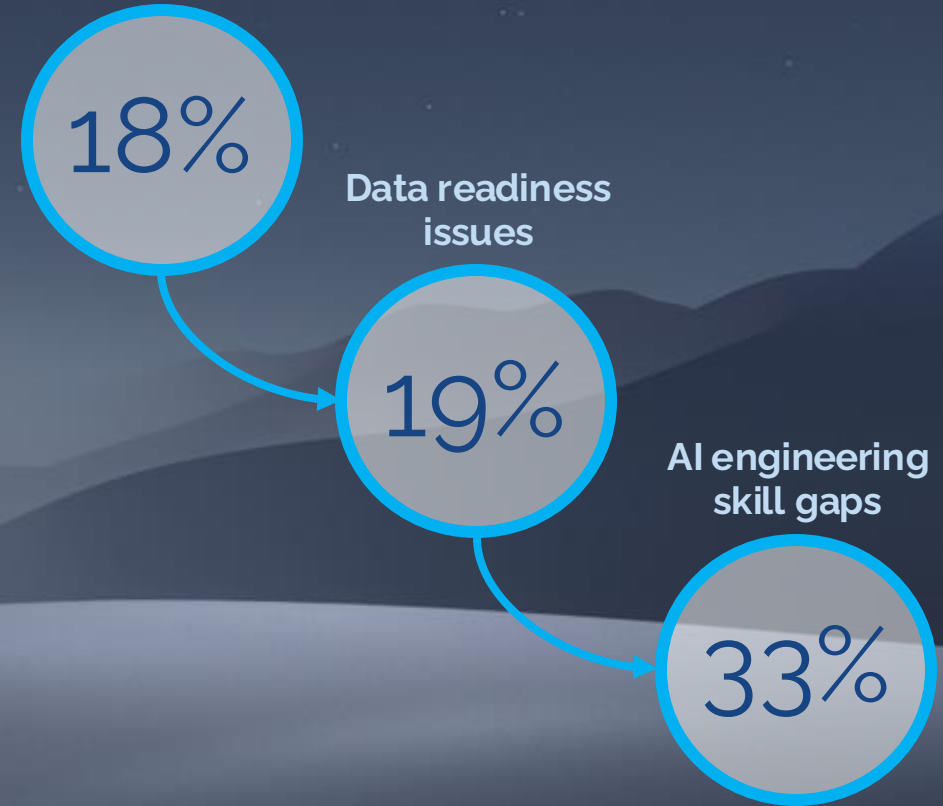
Security



Integrating AI outputs into decision workflows



Securing business team buy-in



2



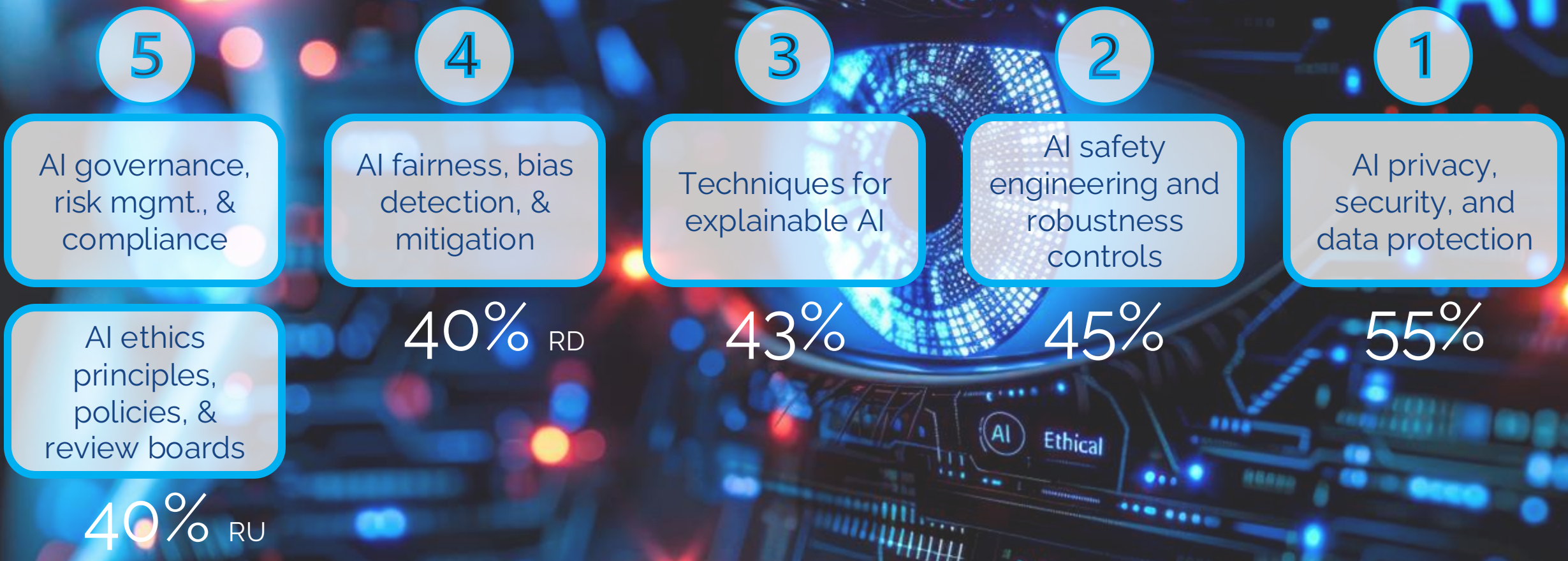
The role of data in scaling AI

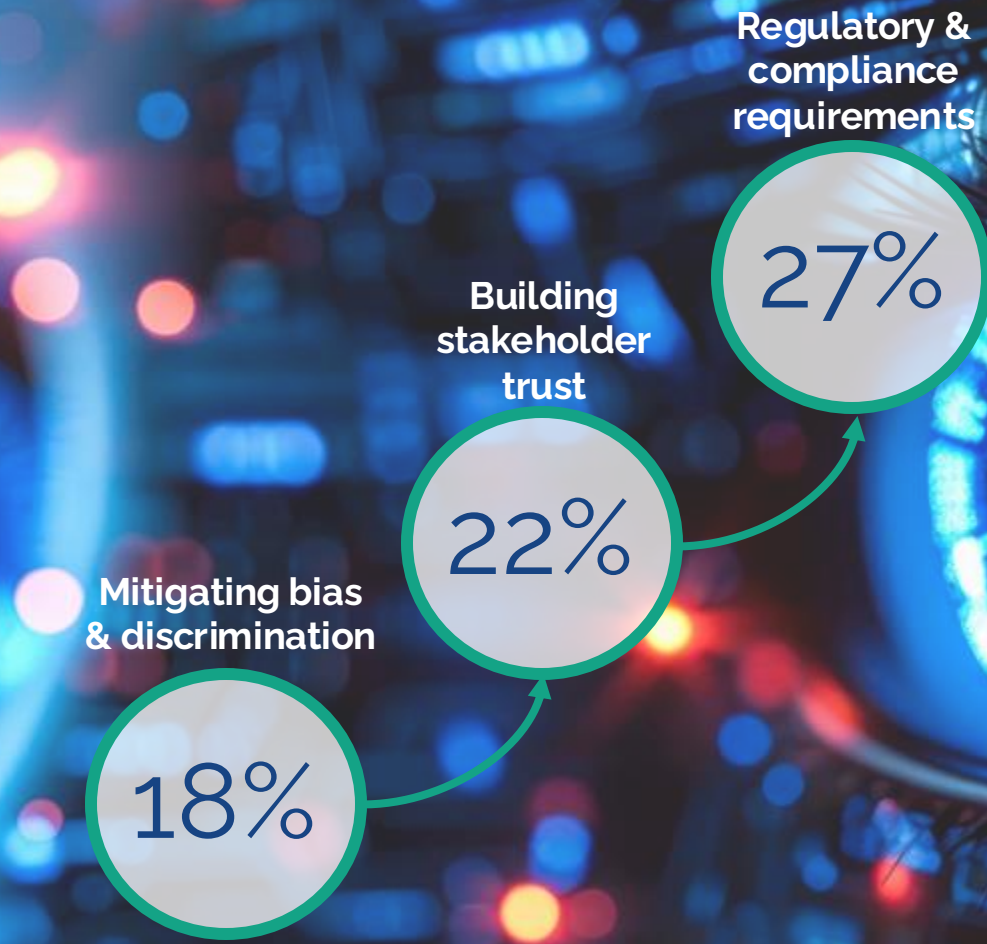


3

Being responsible with AI

46% said that Responsible AI is a high priority, with exec support





4



Explaining the outputs of AI



Scalability of XAI to production

20%

Aligning XAI with existing workflows

23%

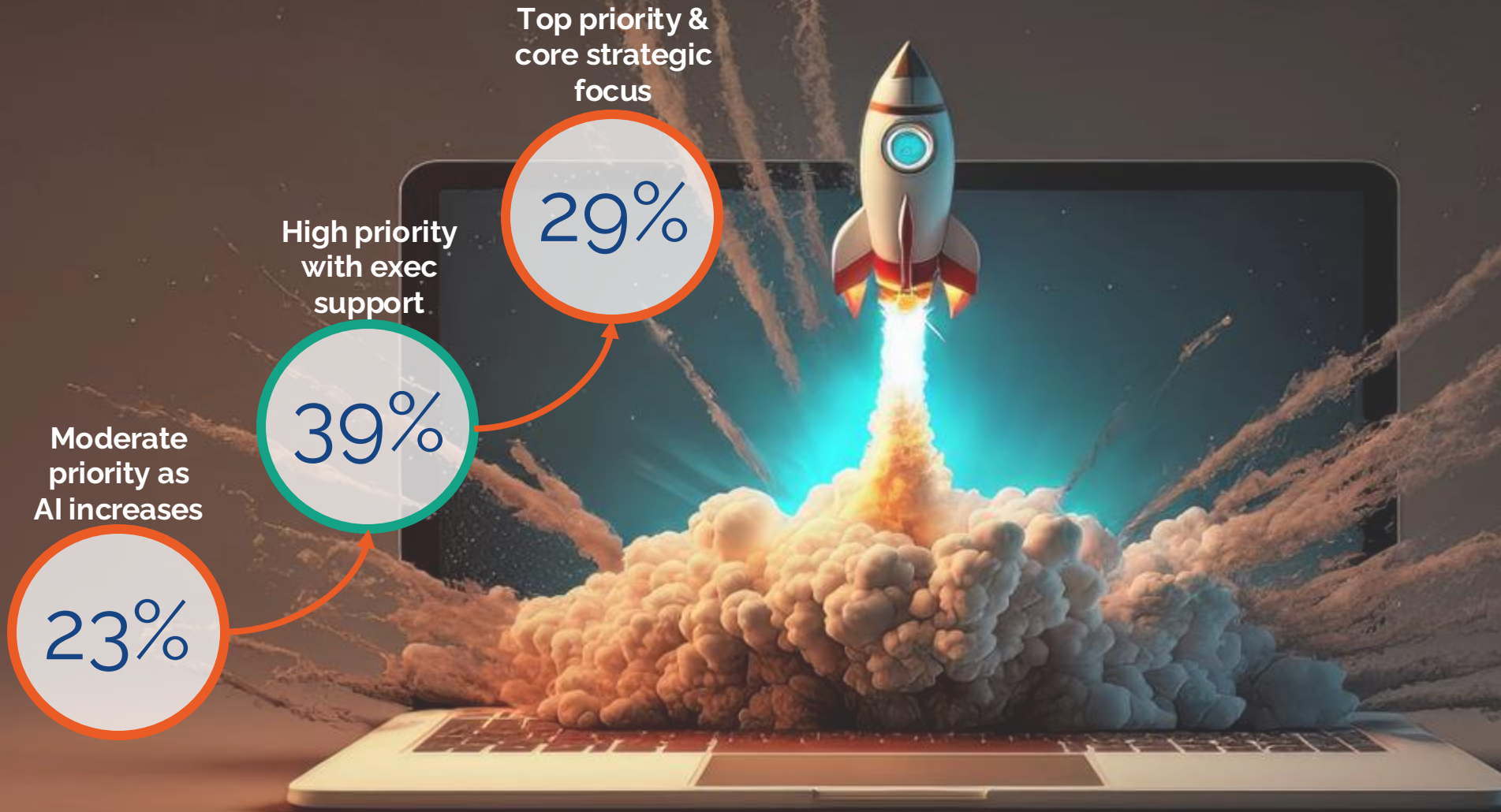
Performance to explainability trade-offs

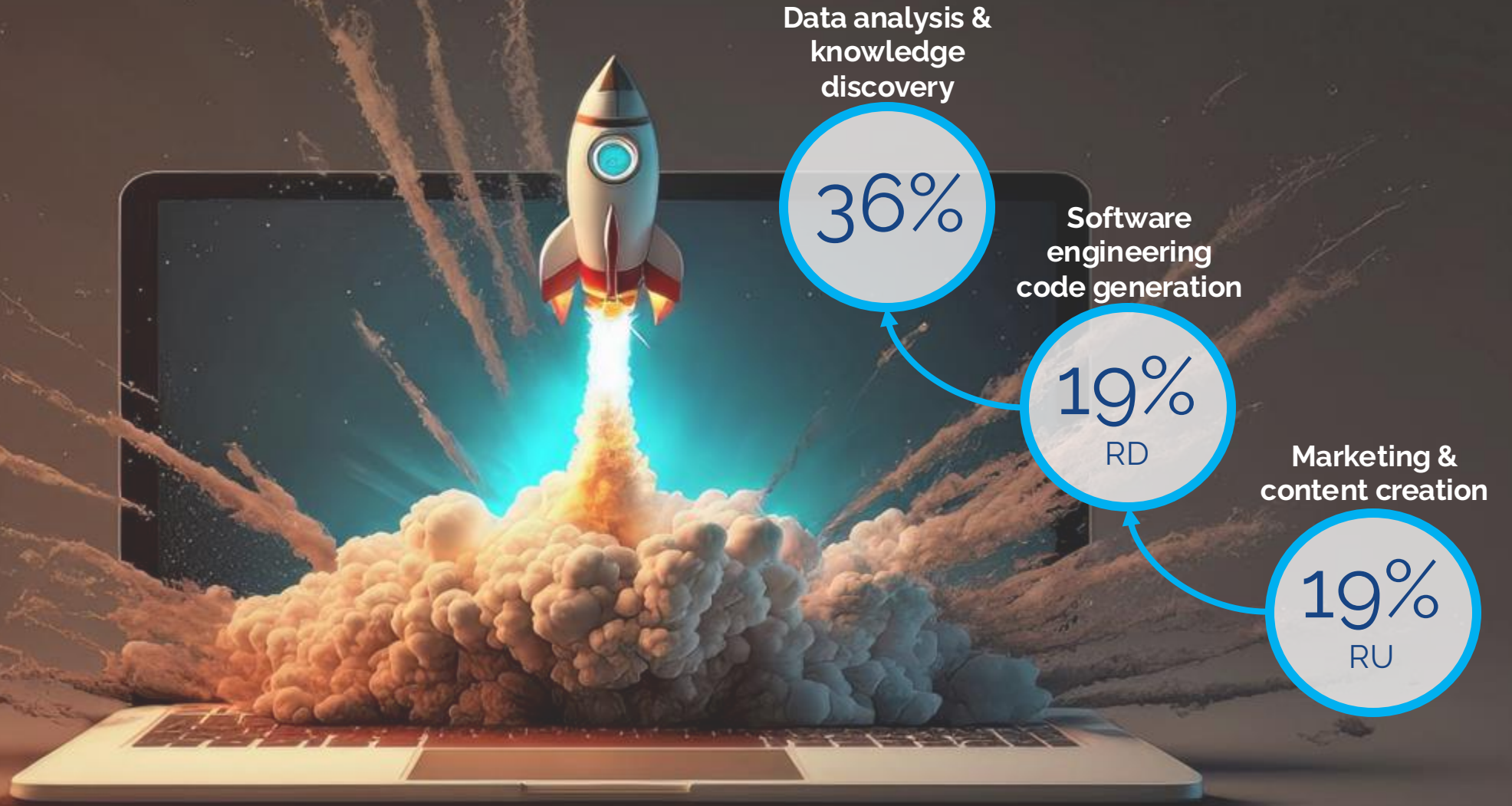
24%

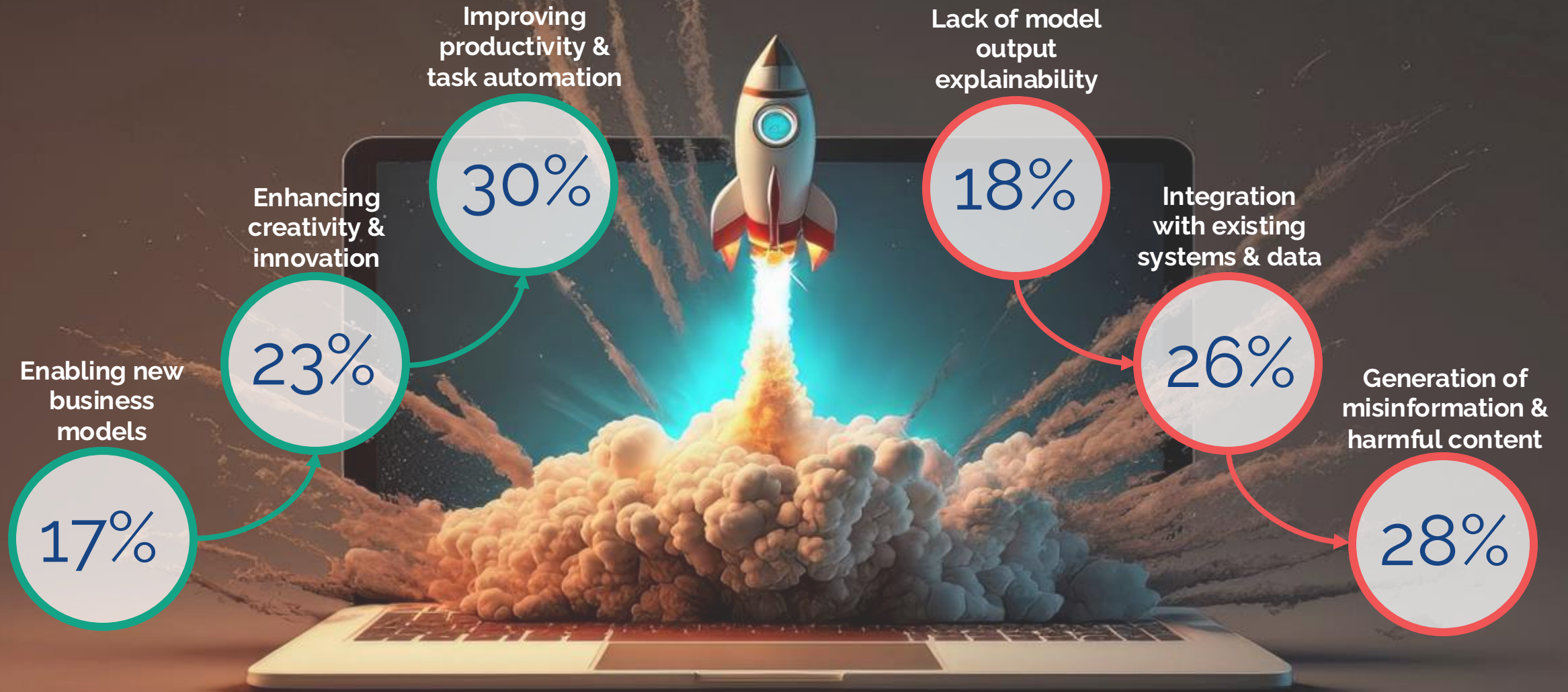
5



The reality of generative AI







6



PAC Research Agenda 2025

AI-related Research 2024-2026



AI-related Research 2024-2026

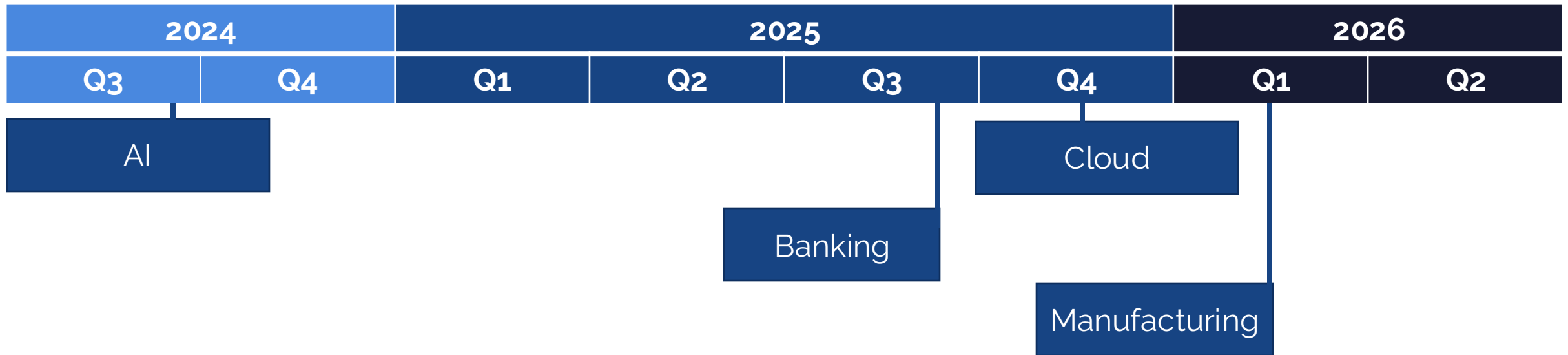


2024		2025				2026	
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2

AI-related Research 2024-2026



User surveys – to create targeted marketing content or for internal, strategic use



AI-related Research 2024-2026



Market figures and forecasts to identify the markets with the best potential and to prioritize investments

2024		2025				2026	
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2

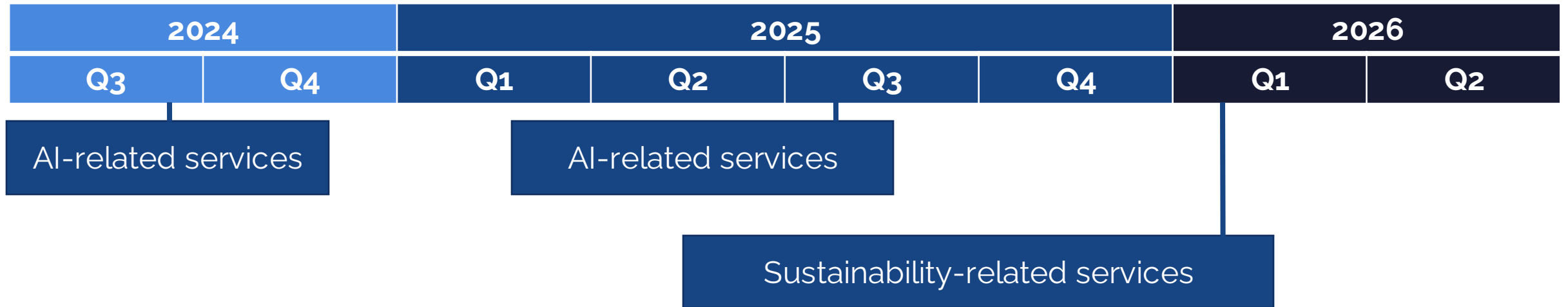
AI, GenAI, Big Data, BI - services figures for 35+ countries and regions in Europe and WW

AI, GenAI, Big Data, BI - services figures for 9 industries in core countries and regions

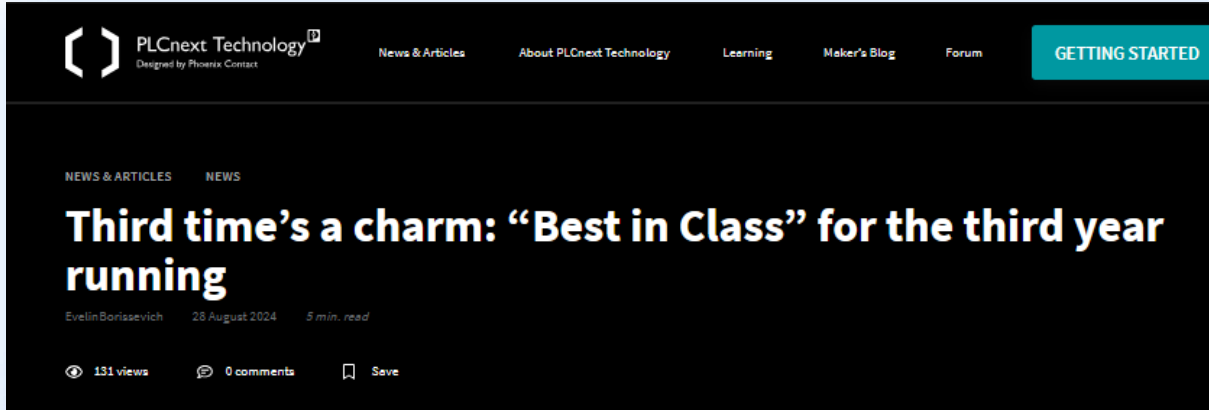
AI-related Research 2024-2026



IT Provider Benchmark as a marketing tool
for providers and selection tool for users



Sehen Sie, wie unsere Kunden das PAC RADAR



Phoenix Contact
197.103 Follower:innen
2 Wochen · 🌐

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

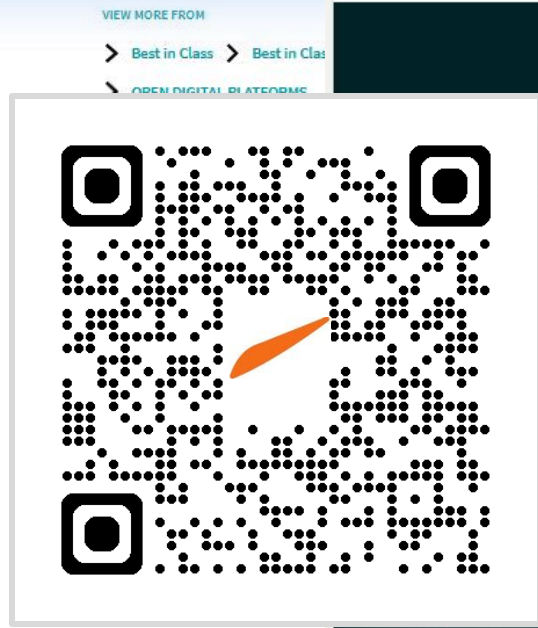
What's better than winning a
We're proud to announce that the Open Digital Platforms for Industrial Edge Management in Europe 2024 category by PAC for the third year in a row.

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

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

#plcnext #iamplcnext #best #industrialgedmanagement

Übersetzung anzeigen



Gre Nic Lo

PAC

We're seeing the market Contact

Überset:

Wat is e winnen!

PLCnext op een Platform

Deze pri industrii industrii motivati

Samen g

#plcnext #edge

Überset

Gefällt mir 46

Kommentar

PAC 8.241 Follower:innen
1 Woche · 🌐

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

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

Learn more about PLCnext Technology's positioning in our Open Digital Platform for the Industrial World in Europe 2024 RADAR: https://lnkd.in/deTa9q_U

#PACRADAR #ITcompanies #positioning #industrialgedmanagement

Übersetzung anzeigen

The PAC INNOVATION RADAR chart plots various companies based on Competence (y-axis) and Market Strength (x-axis). The chart is divided into three zones: STRONG, LEADING EDGE, and BEST IN CLASS. Phoenix Contact is positioned in the BEST IN CLASS zone, indicated by a white dot. Other companies are represented by orange dots. The chart title is "PAC INNOVATION RADAR Open digital platforms for industrial edge management" and it is dated © PAC 2024.

Gefällt mir 46

Kommentar 1

Teilen

Sende

AI-related Research 2024-2026



Rankings to communicate your market leadership role

2024		2025				2026	
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2

AI services for core countries and regions
- revenue, growth, market share -

Use cases for Vendor Rankings in communication, marketing

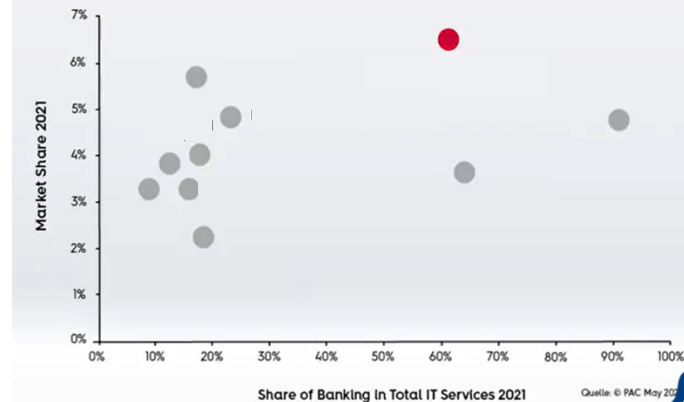


Show your market strength in investor & analyst presentations

Build trust with clients by demonstrating your expertise in RFIs

Communicate your market leadership to potential customers

**Leading IT Services Providers
Vendor Ranking Banking Sector Germany**



Non-binding sample presentation

AI-related Research 2024-2026



2024		2025				2026	
Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2

What is the total addressable market for our GenAI services and where should we focus our efforts?

Expanding inorganically through M&A and build offshore resources – what are possible targets?

PAC Research Agenda 2024-2026



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



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



Date of publication



Date of publication

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

Classification of PAC Vendor Benchmarking Products

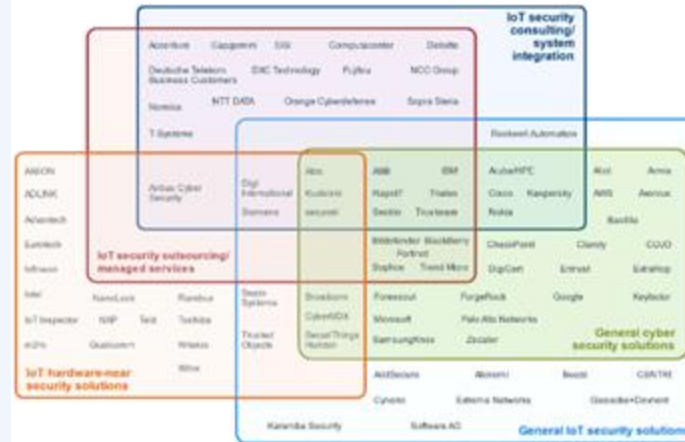


Shortlist: **RADAR** (benchmarking)



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

Longlist: **Vendor Landscapes** (positioning)



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

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

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

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

Our Value Proposition



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

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

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

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

Client Example: CxO Survey

Rising up to the cloud



Other available content formats:

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

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



Digital Europe Update Newsletter



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

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

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

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PAC DIGITAL EUROPE UPDATE
No.1 / December 2023

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

NEWS

Accenture has acquired UK-based Redkite, a data consultancy with 230 employees that specialises in data strategy, and architecting and implementing modern data platforms.

PwC announced a strategic alliance with Engine by Starling, the SaaS platform for financial services organisations to launch new digital banking propositions and businesses.

DEALS

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

Account	Sector	Region	Vendor	Overview
Apian	Transport	UK	Zipline	Apian, a U.K. based healthcare logistics company, is partnering with Zipline to significantly expand a NHS programme delivering medical supplies using drones.
Bio Partner	Manufacturing	Switzerland	Infor, AWS	Swiss food wholesaler Bio Partner has successfully implemented Infor CloudSuite Food & Beverage on the AWS cloud.



Q&A



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THANK YOU FOR ATTENDING OUR WEBINAR TODAY.



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