European Services Overview

With end-user organizations looking to take advantage of emerging technologies and digital business models to create a competitive advantage, service providers are under pressure to expand their capabilities to capitalize on market demand. However, customers are also seeking new types of relationship with their service providers based on agility, continuous innovation, and collaboration. IDC's *European Services Overview* tracks new developments in the demand-side and supply-side services landscape and provides a qualitative and quantitative view of the European services market.

MARKETS AND SUBJECTS ANALYZED

- Project-oriented services: IT consulting, business consulting, systems integration, custom application development, and network consulting and integration services
- Managed services: IT outsourcing, application management, network and endpoint outsourcing, hosted application management, hosting infrastructure services, and key horizontal BPO
- Support services: hardware deploy and support, software deploy and support, and IT education and training
- European countries: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Poland, Portugal, Romania, Russia, Spain, Sweden, Switzerland, and the U.K.
- Current and future trends shaping services demand in Europe
- The competitive landscape in the European services market
- Industry demand drivers and trends
- End-user perceptions of services vendors
- Market sizing and growth rates
- Commentary on evolving customer needs
- Trends shaping IT skills demand in Europe

CORE RESEARCH

- Playbooks addressing the key actions required for service businesses to adapt to key changes in the market
- European Services Market Forecasts
- Spending Priorities of European Organizations
- Top 30 European Services Vendors' Revenues and Market Shares
- The Journey to the Digital-First Services Provider
- The Co-Existence of Hyperscalers and Services Providers
- The Impact and Opportunity of AI
- Partnerships and Ecosystem Analysis
- Skills, IT Training, and Education Developments, Opportunities, and Outlook
- IDC Links, Market Notes, and Market Presentations covering events and trends in the services market

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: European Services Overview.

KEY QUESTIONS ANSWERED

1. What are the key actions services businesses must take to remain competitive?
2. How should investments be prioritized among emerging technologies?
3. What is the demand for IT services and business services in Europe, and how will it grow over the next five years?
4. What are the most important demand-side and supply-side trends and drivers in European services? How and why are they changing?
5. How did the leading services companies perform in 2024?
6. Which European services providers currently have a competitive advantage and why?
7. How do trends such as digital business, AI, and cloud impact demand, and how will they change the competitive landscape?
8. How do services vendors need to change to adapt to the new digital realities?
9. How do services providers engage in ecosystems, and what does it mean for their success?

COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of providers in the European services market, including:

Accenture, Atos, Bain, BCG, BearingPoint, BT, Canon, Capgemini, Capita, CGI, Cognizant, Computacenter, Dell, Deloitte, DXC, EY, Fujitsu, HCL, HPE PointNext, IBM, Infosys, Konica Minolta, KPMG, Kyndryl, McKinsey, Oracle, Orange Business, PwC, Publicis Sapient, Reply, Ricoh, SAP, Sopra Steria, Sharp, TCS, Tech Mahindra, TietoEVRY, T-Systems, Unisys, Wipro, Xerox