RADAR

Digital Platforms for Connected Workers in Europe 2025

SITSI® I Vendor Analysis I PAC INNOVATION RADAR



Positioning of TeamViewer

Lead analyst: Arnold Vogt
July 2025

PAC

RADAR

TABLE OF CONTENTS

PAC INNOVATION RADAR Graph 4

The Bigger Picture: Digital Trends Shaping the Manufacturing Industry Today (Based on PAC's CXO Survey 2024/25) 5

Introduction & Methodology of PAC's Global CxO Survey 2024/25 5

Key Insights for the Manufacturing Industry from PAC's CxO Survey 2024/25 5

Our Research Approach: Trends in Manufacturing are Shaping this PAC INNOVATION RADAR's Agenda 9

Market Situation: Digital Platforms for Connected Workers 10

Research Scope 10

Trends in the Vendor Landscape 10

Important Capabilities of Leading Platforms 11

Leading Vendors 11

PAC INNOVATION RADAR "Digital Platforms for Connected Workers in Europe 2025" 13

Review of Top-Seeded Provider TeamViewer 14

TeamViewer – Best in Class 14

APPENDIX 15

The PAC INNOVATION RADAR 15

Definitions & Segmentation 15

Provider Selection and Participation 17

Evaluation Method 17

Evaluation Criteria 18

PAC RADAR Report License 19

About the PAC RADAR 20

About PAC 20

© PAC 2025 – external reprint rights – TeamViewer –

TABLE OF FIGURES

Fig. 1: PAC INNOVATION RADAR graph 4
Fig. 2: Economic challenges 5
Fig. 3: Statements about digitization challenges 6
Fig. 4: Importance of topics on the organization's IT agenda 6
Fig. 5: Use of cloud deployment models 7
Fig. 6: Statements about the business application strategy 7
Fig. 7: Investments in big data & analytics technologies 8
Fig. 8: Selection of IoT vendors 8
Fig. 9: Goals regarding customer experience 9
Fig. 10: Market segmentation according to different use cases for connected workers 10
Fig. 11: PAC INNOVATION RADAR "Digital Platforms for Connected Workers in Europe 2025" 13
Fig. 12: PAC INNOVATION RADAR – segments analyzed 16
Fig. 13: PAC INNOVATION RADAR – evaluation method 17
Fig. 14: Connected Workers – evaluation criteria 18

DOCUMENT INFORMATION

Author: Arnold Vogt (a.vogt@pacanalyst.com)
Publication: July 2025
Scope ID: Digital Innovation & IoT I Europe I 2025
Portfolio ID: SITSI I Vendor Analysis I PAC INNOVATION RADAR
Related reports: This document is part of a series of eight PAC INNOVATION RADAR reports.

© PAC 2025 – external reprint rights – TeamViewer –

PAC INNOVATION RADAR GRAPH

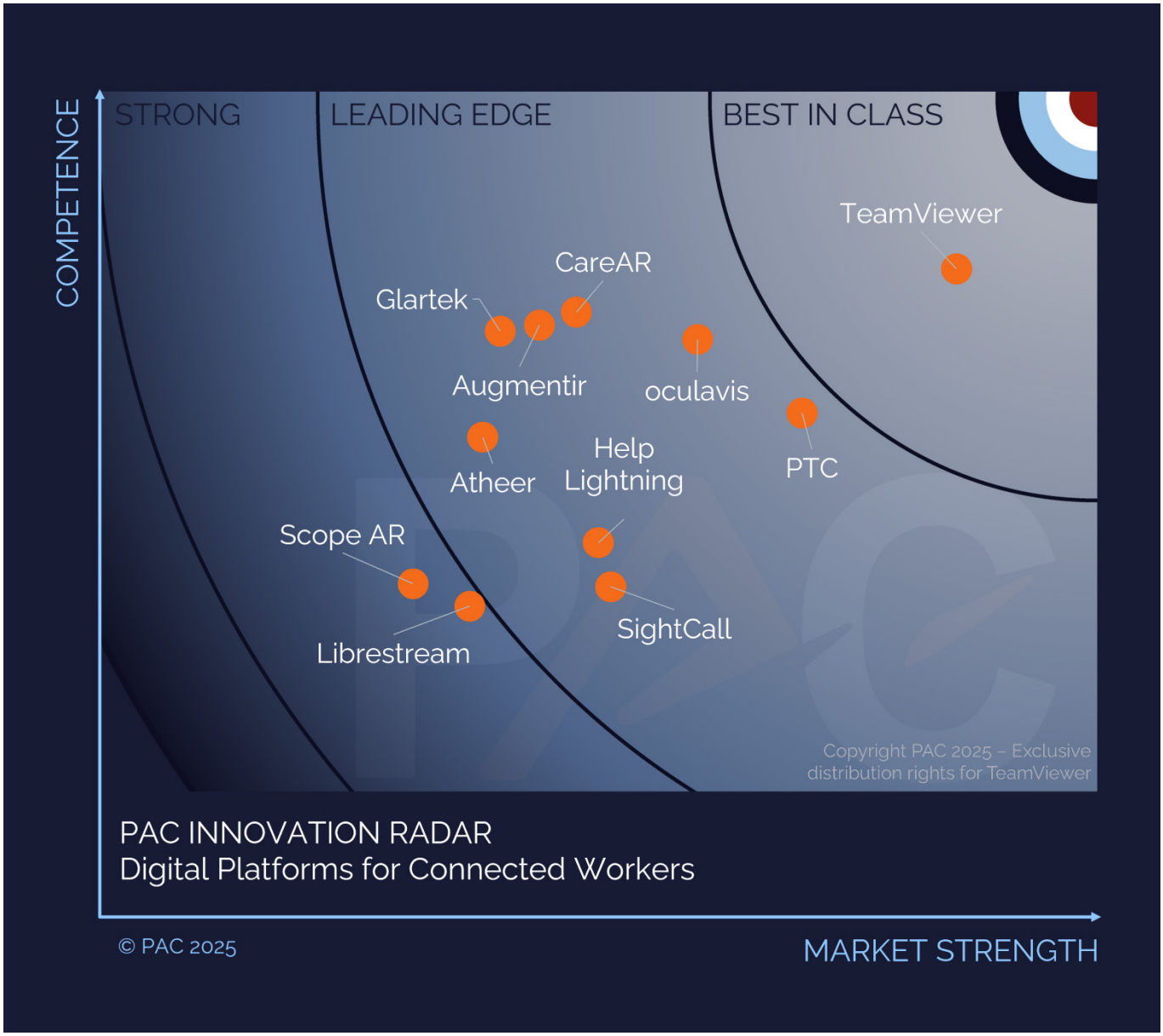


Fig. 1: PAC INNOVATION RADAR graph

Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). 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 upper right corner, the closer they are to meeting customers' requirements.

THE BIGGER PICTURE: DIGITAL TRENDS SHAPING THE MANUFACTURING INDUSTRY TODAY (BASED ON PAC'S CXO SURVEY 2024/25)

Introduction & Methodology of PAC's Global CxO Survey 2024/25

In order to provide orientation in a highly dynamic IT landscape, PAC conducted the 2024/25 edition of its annual "SITSI® CxO Investment Survey," interviewing IT decision-makers in user companies covering PAC's SITSI® core markets to obtain their views on current IT trends, key requirements, and investment plans. The survey was carried out in October/November 2024. This chapter summarizes the key results of the study for the manufacturing industry.

In the manufacturing industry, 647 organizations participated in the survey. The interviews were held with IT department managers and line-of-business managers who are involved in decisions concerning (local) IT budgets, IT investments, or IT sourcing. The survey sample was made up of companies of different sizes from all subindustries.

Key Insights for the Manufacturing Industry from PAC's CxO Survey 2024/25

Adapt fast to a highly volatile economic world – The economic situation and fast-changing market environments on the one hand, and cost pressure and increasing competition on the other create a highly volatile and challenging market situation. Agility in innovation and cost management are key for manufacturing companies today. This creates a lot of headache in IT departments. The agility to adapt to new technologies, a shortage of skilled IT experts, and cost pressures are the top-three IT challenges for manufacturers worldwide.

Digital transformation projects are under review – Even though manufacturing companies are willing to increase their IT budgets in general, they acknowledge the need to react agilely to new situations. Manufacturing companies have even put some IT projects on hold because of the economic situation and/or shifted the focus of their transformation projects to process optimization (automation). The political situation is forcing them to prioritize data sovereignty and domestic technology providers. We expect some companies to put IT projects on hold to reevaluate their risk scenarios. Politics has an impact on IT projects in manufacturing today.

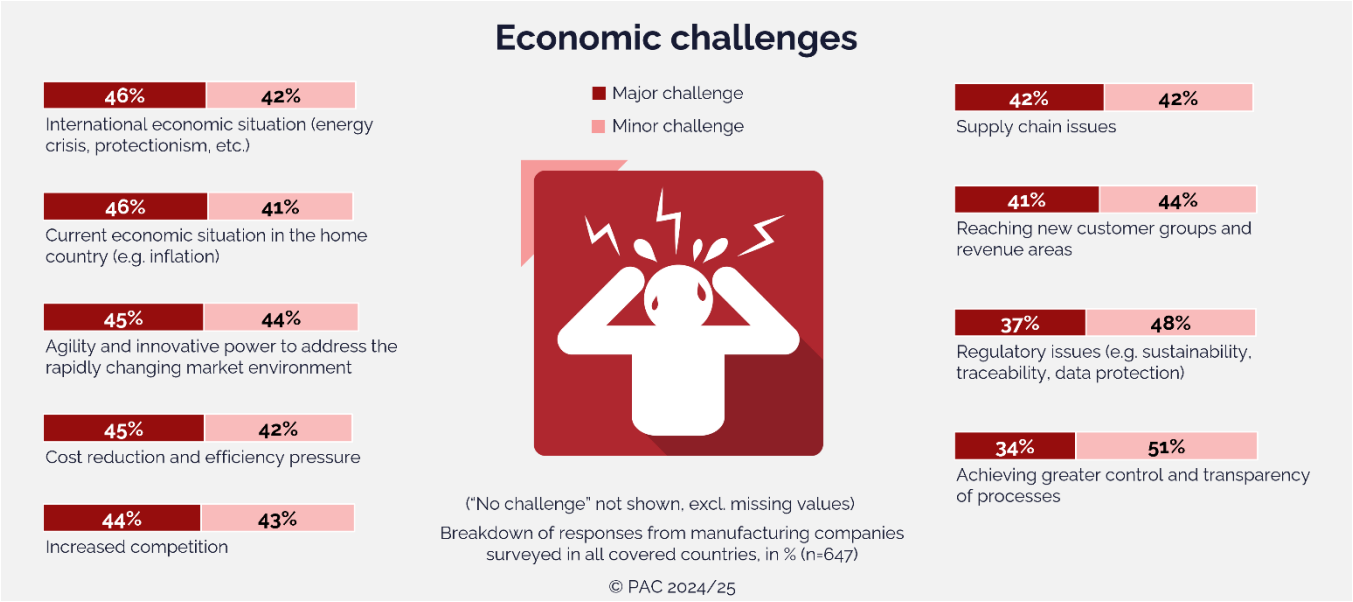


Fig. 2: Economic challenges

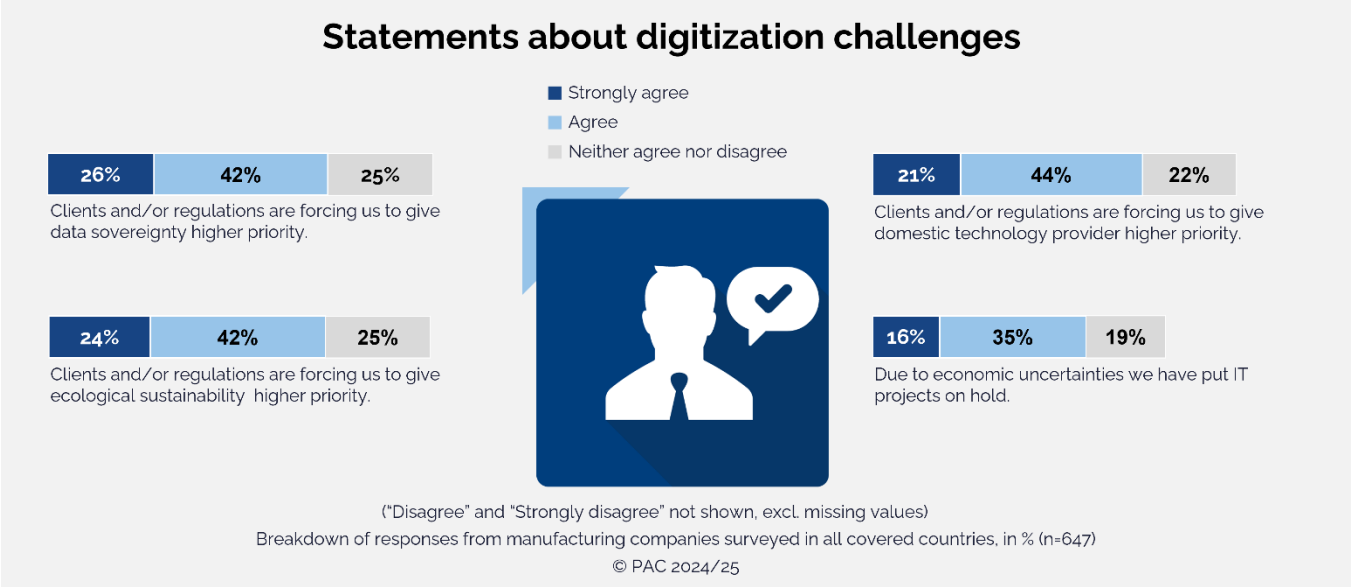


Fig. 3: Statements about digitization challenges

Security-first approach – Cybersecurity is the top priority due to the global political rivalry and the increasing number of cyber-attacks. Data analytics and cloud computing are further priorities to improve efficiency, innovation, and competitiveness. GenAI is seen as relevant but often not as a general game-changer (except for GenAI in drug and material development).

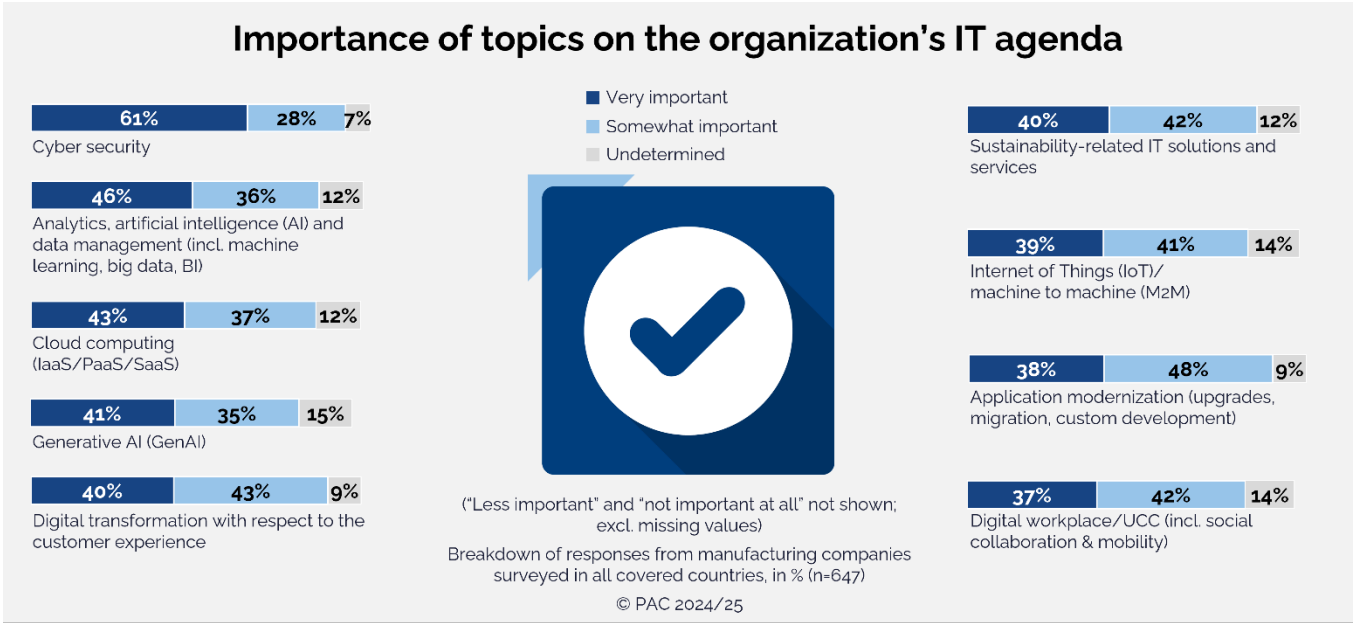


Fig. 4: Importance of topics on the organization's IT agenda

Cloud usage becomes more diversified – Public cloud is the main cloud deployment model today. However, European manufacturers in particular plan investments in all other areas to overcome their dependencies. As cloud usage keeps growing, we will see more edge, hybrid and multi-cloud usage models.

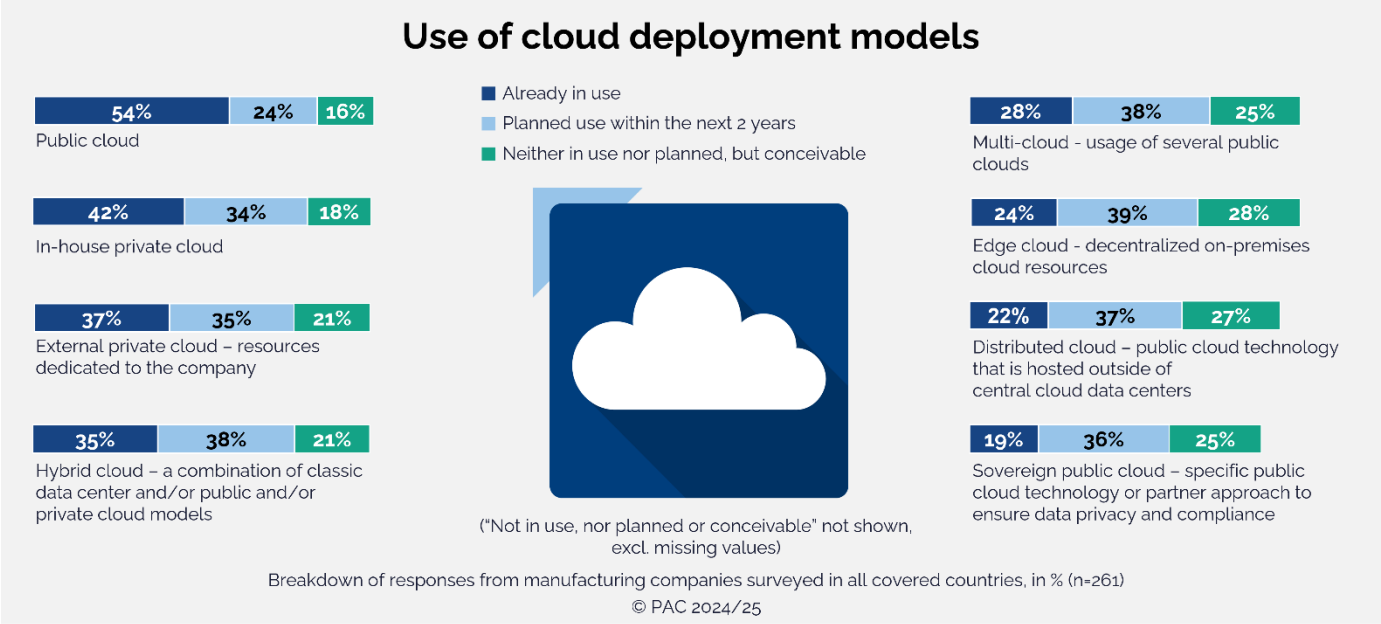


Fig. 5: Use of cloud deployment models

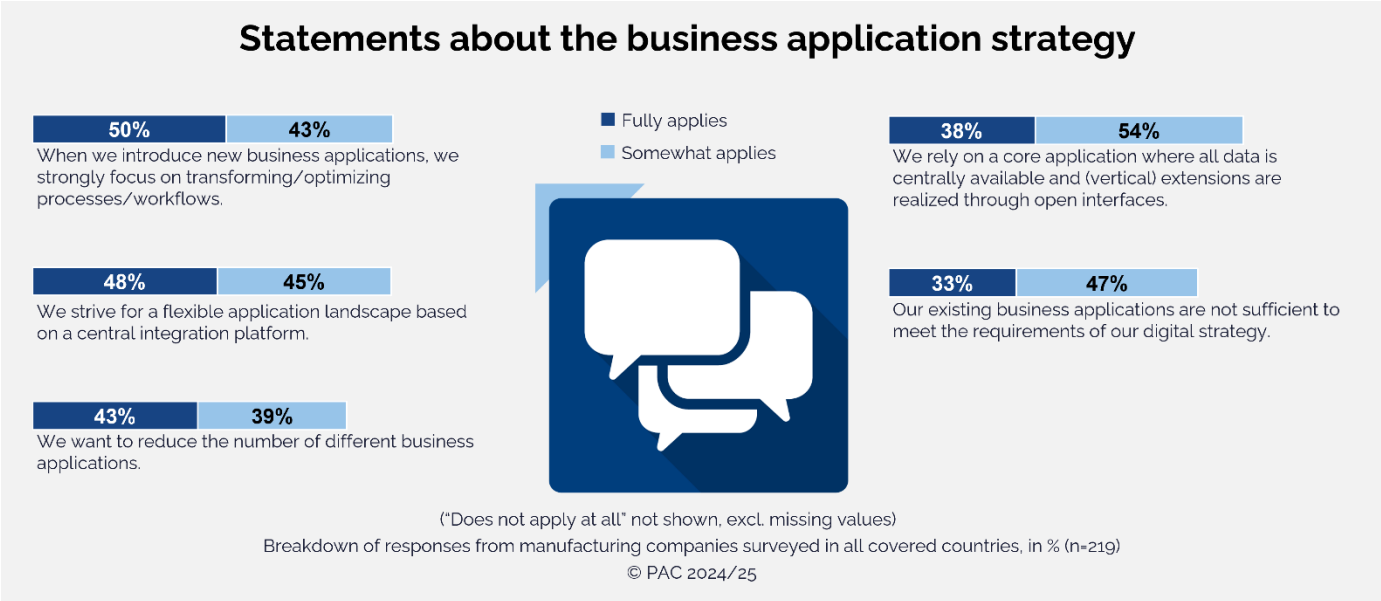


Fig. 6: Statements about the business application strategy

Integration platforms become the centerpiece of the business application landscape – SAP has been and will remain the leading business application platform for manufacturing companies. Workday is another investment priority today. Most interestingly, almost one in two manufacturers aims for a flexible application landscape based on a central integration platform.

The data lakehouse concept becomes key for AI in manufacturing – Data virtualization, which is based on the data lakehouse concept, is a hot topic for the entire manufacturing industry, as is data preparation and shifting data and analytics to the cloud. Especially the chemical and pharmaceutical industries are hot spots. These companies apply AI in the discovery and development of drugs and new materials.

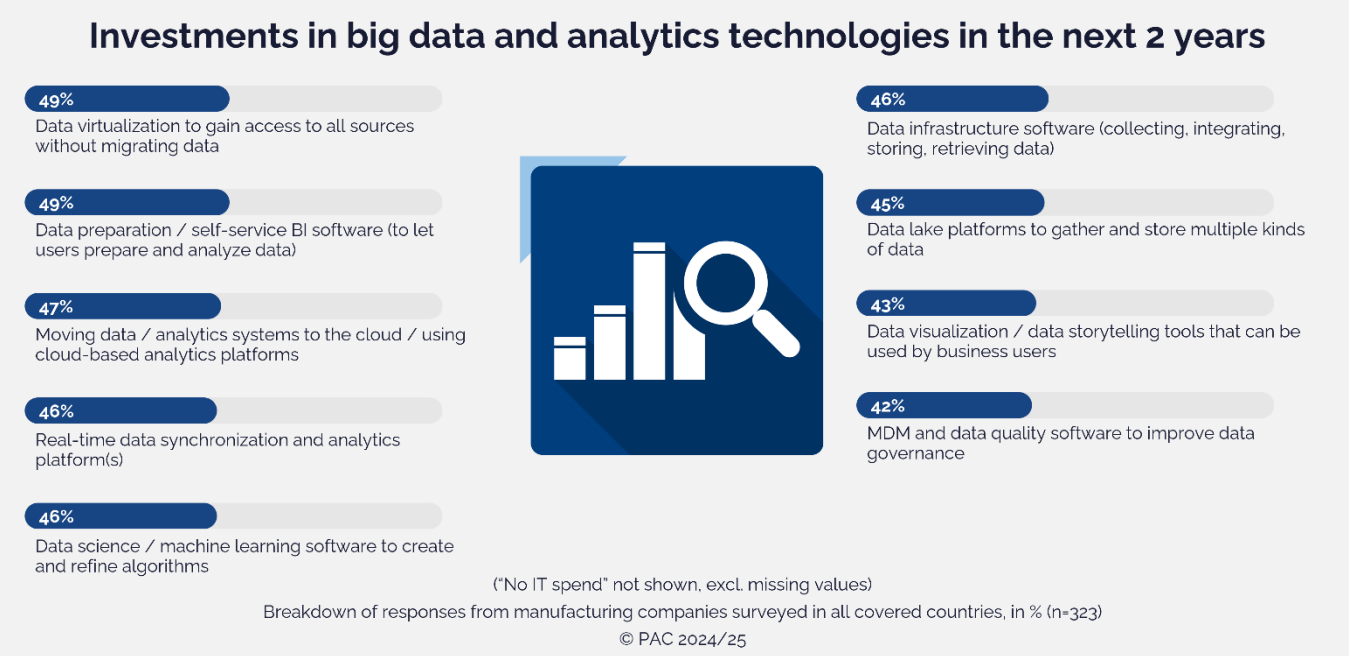


Fig. 7: Investments in big data & analytics technologies

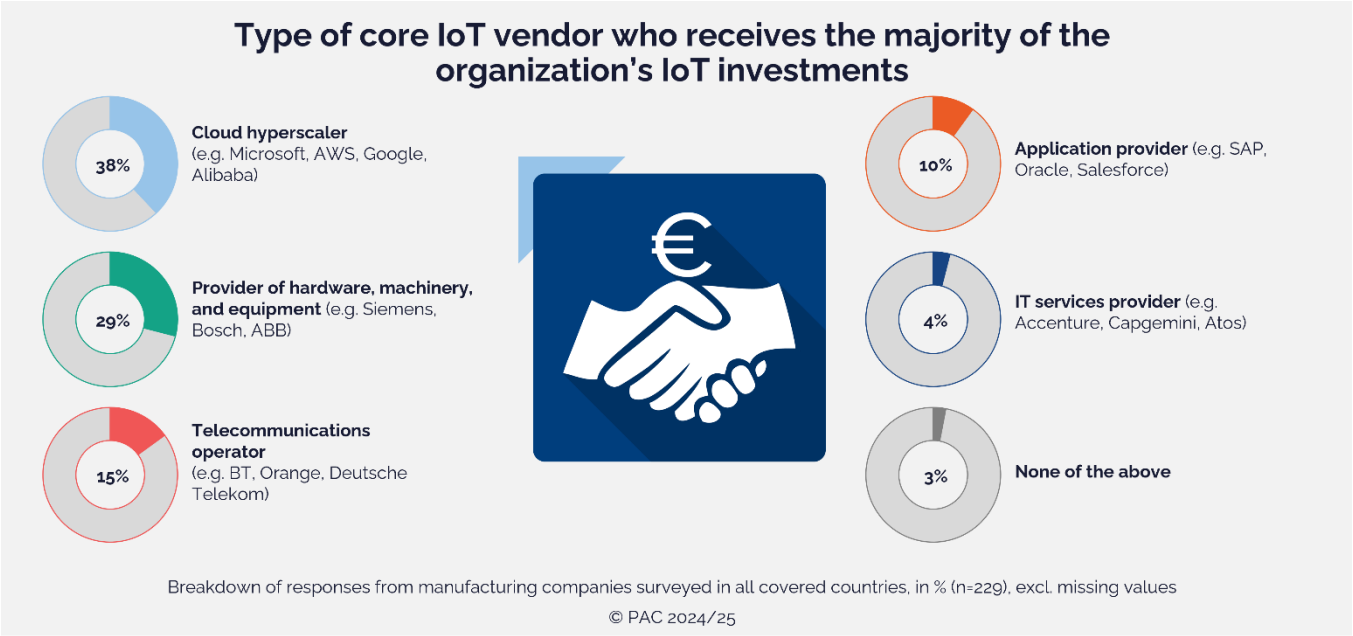


Fig. 8: Selection of IoT vendors

Industrial IoT reaches a certain maturity level, while coopetition of large IT and OT vendors continues in this field – Around 50% of manufacturers have reached at least a moderate maturity level across various categories of IoT use cases. This confirms that IoT is a standard capability today. The battle continues between hyperscalers and OEMs to become the core IoT vendor for their customers.

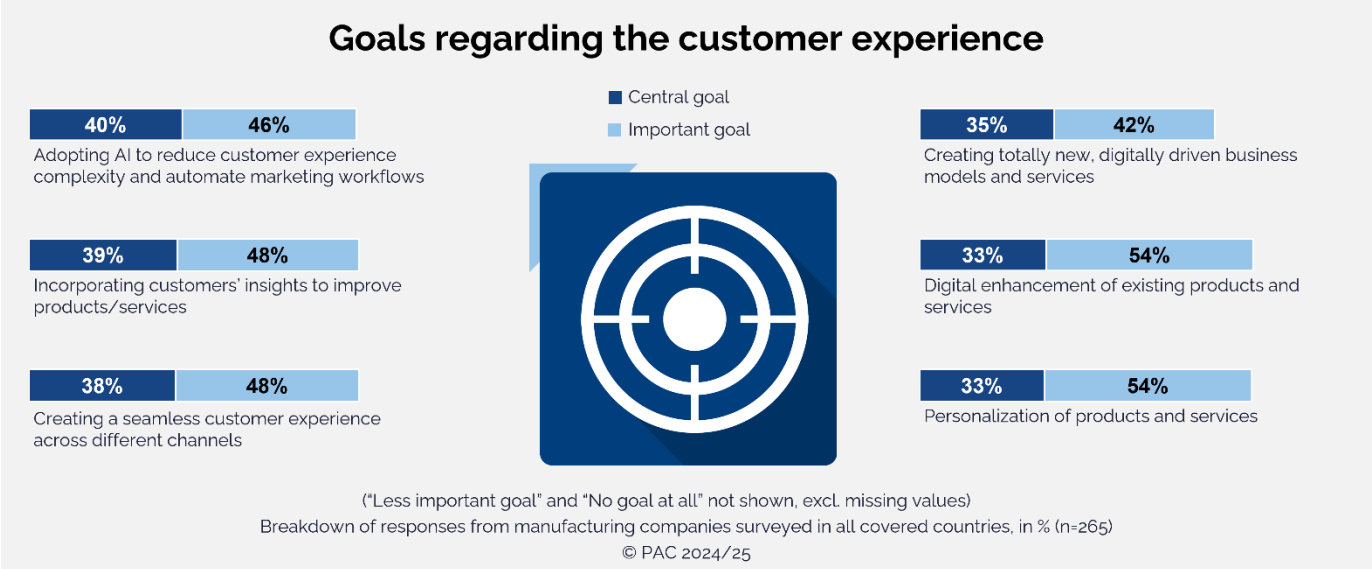


Fig. 9: Goals regarding customer experience

Applying AI to improve digital customer/user experience and gaining more customer insights – Applying AI to improve the digital customer/user experience is key. Manufacturing companies predominantly want to gain more insights into how customers perceive customer services. Moreover, they hope to gain more insights into customer requirements and product usage.

OUR RESEARCH APPROACH: TRENDS IN MANUFACTURING ARE SHAPING THIS PAC INNOVATION RADAR'S AGENDA

Innovations in IT are increasingly shaping the OT world. Feedback from user companies suggests that they are looking for digital platforms and service providers with key capabilities around very specific and innovative industrial use cases to take their IT/OT integration to the next level. For this, PAC creates transparency in the vendor landscape for specific industrial use cases at the intersection of IT and OT. PAC is continuously expanding the scope of this PAC INNOVATION RADAR towards emerging areas at the interface of IT and OT to address fast-evolving user needs.

RADAR TOPIC	RELATED TOP TRENDS IN MANUFACTURING
Digital platforms for industrial edge management	• Cloud use is becoming increasingly diverse • Security-first approach
Digital platforms for an industrial data lakehouse	• The data lakehouse concept is becoming key for AI in manufacturing
Digital platforms for an integrated digital thread	• Integration platforms and business applications to establish a digital thread
Digital platforms for connected workers	• Increasing worker efficiency with digital technology
Digital platforms for AI-advanced industrial robotics	• Use of AI to make industrial automation solutions more adaptable and flexible
Platform-related digital service providers for industrial data lakehouses	• The data lakehouse concept is becoming key for AI in manufacturing
Platform-related digital service providers for the industrial metaverse	• Applying AI to improve digital customer/user experience
Platform-related digital service providers with multi-PLM platform expertise	• Managing a heterogeneous and ever-evolving application landscape

© PAC 2025 – external reprint rights – TeamViewer –

MARKET SITUATION: DIGITAL PLATFORMS FOR CONNECTED WORKERS

Research Scope

The CXO Survey mentioned above confirms that the manufacturing industry is willing to further invest into the improvement of worker efficiency via digital technology. Platforms for connected workers are one relevant aspect in this context. In our definition, these platforms support use cases around digital work instructions, visual guidance and verification, but also digital support content and remote expert services for mobile, industrial workers. As the platform market around these use cases is further evolving, we continuously adapt our research scope. This is not different in 2025.

To understand PAC's research focus in 2025, it is helpful to understand the evolution of the research scope over the years. PAC started to evaluate the connected worker topic in 2019 and has adapted the scope continuously in line with the market evolution. The starting point was pretty simple, by asking the question "What does augmented reality (AR) technology mean to the industrial world?" The initial vendor landscape was therefore centered around AR-based platforms for industrial purposes. It included companies like PTC, Re'flekt (today part of PTC), and Upskill (today part of TeamViewer). However, as we always take a user perspective and not a technology perspective, we have shifted our scope in our market evaluations towards the main AR-related use case we recognized in the market at that time, which focused on the visualization of work instructions for mobile workers. Because of this, PAC named the topic "Connected Worker (AR)." As a result, we also included other vendors, such as Ubimax (today part of TeamViewer), who provided low-code platforms to create mobile work instructions without a dedicated focus on AR (as for picking in logistics). Over time, we have recognized that vendors in our analysis started to expand the scope of their platforms step by step. Besides the work instructions use case, remote expert capabilities have become increasingly relevant. This was an especially critical capability during the Covid-19 period (2020-22). As a result of this development, we have extended the scope of our research and evaluated connected worker platforms that address the needs of various use cases. This implied that we also have to include more and more the existing, dedicated platform vendors of remote expert services, such as oculavis, Librestream, or SightCall, since they have also extended their scopes beyond purely remote expert services and moved into the work instructions space. While we previously included platform vendors who provide digital services related to work instructions and/or remote expert services, in 2025 we will only evaluate vendors that provide a combined offering of visual (AR/AI-based) work instructions and remote expert support for mobile industrial workers. This decision is based on the fact that there is a growing overlap between vendors that only offer digital work instructions for mobile workers and low-code MES solutions such as Tulip, which address the needs of work instructions related to fixed workplaces in factories (typically via screens), and the offerings can also be used interchangeably.

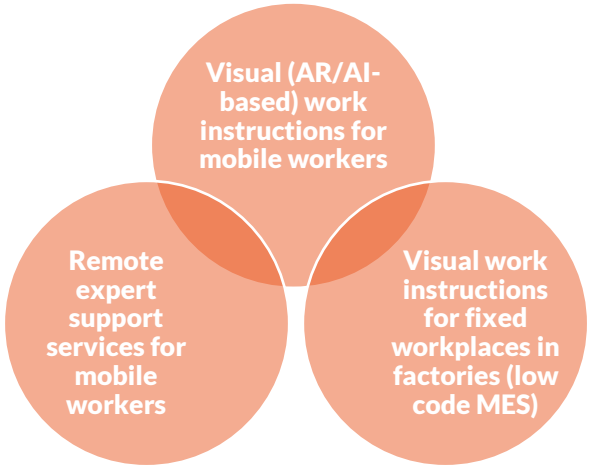


Fig. 10: Market segmentation according to different use cases for connected workers

Trends in the Vendor Landscape

The shift in research scope described above (focus on vendors with offerings related to work instructions and remote expert support) has only very limited consequences in the evaluated vendor landscape. Based on this fact we excluded Dassault Systèmes from the current PAC RADAR analysis, as they offer AR-based work instructions without remote expert support services.

Another vendor we excluded from this year's analysis is Microsoft. This is based on two facts: First, Microsoft's offering for digital work instructions (Microsoft Dynamics 365 Guides) only works with Microsoft's HoloLens, which will no longer be manufactured. HoloLens customers face the challenge that the device will expire in 2027 and there is no replacement in sight. Second, Microsoft's offering for remote expert support (Microsoft Dynamics 365 Remote Assist) is no longer available. It could be replaced by Microsoft Teams, but Microsoft took no action to position Microsoft Teams as a replacement for it. We see Microsoft's focus on AR and connected workers eroding. As there is no clear strategy at the moment, we exclude them from the current vendor landscape. We will keep an

© PAC 2025 – external reprint rights – TeamViewer –

eye on them in case the situation changes in the near future.

One comment on PTC, as this vendor dropped out of the "Best-in-Class" category this year. For several years PAC recognized PTC as one of the leading vendors in this space. PTC's current focus on the niche market of high-end AR with the associated use cases of visual verification (automated quality inspection, autonomous recognition of next work steps) and realistic, virtual worker training, is not paying off from PAC's current perspective. The reason is simple: Smart glasses with high-end AR capabilities like Microsoft HoloLens are still struggling to reach broader adoption in the market (not convenient enough). As a result, adoption of these high-end AR use cases is also limited and customer projects at scale are missing. Newer devices like Apple Vision Pro are have so far been no exception in this context. While we have been waiting for years for the big breakthrough in this space, PAC currently has doubts that this will happen in the short term. Besides, PTC silently also started with a portfolio consolidation and its remote expert offering Vuforia Chalk expired in October 2024. As PTC offers a replacement for Chalk with ServiceMax Zinc (based on the acquisition of ServiceMax), the vendor is still represented in our market analysis.

In general, we have to recognize that market consolidation is continuing and that many providers are struggling with growth and profitability. We see four trends to overcome the situation: First, focus on core offering to reach profitability and tight integration with large platform providers like SAP and ServiceNow. Second, address new customer groups with new use cases like remote audit, remote machine commissioning and the integration of remote-controlled/automated robots and drones (to assign digital work procedures to them). Third, consider the expansion of existing customer implementations with additional software offerings. This can for instance include ticketing systems, field service management or skill and learning management. Fourth, increasingly replace human experts in remote expert support services with AI-based automation. TechSee is one example in this context in the B2C space. We expect that some of these trends will shape our research agenda for 2026.

"To survive the ongoing market consolidation, vendors of connected worker platforms have to identify new, relevant use cases and extend the scope of their offering towards service and learning management."

Arnold Vogt, Head of Digital & IoT, PAC

Important Capabilities of Leading Platforms

What differentiates a connected worker platform in today's market? The market consolidation which started already last year still has a direct impact on this consideration. PAC sees six main aspects: First, addressing the most relevant connected worker use cases. Second, proof points for new customer projects, especially larger ones. Third, strategic partnerships that support vendors in their go-to-market. Fourth, financial health (revenue, growth, and profitability) to survive the current consolidation phase. Fifth, meet the security and data privacy expectations of European customers. Sixth, leverage AI to expand the value of your platform.

Leading Vendors

TeamViewer

In 2024, PAC ranked TeamViewer as the market-leading vendor for connected worker platforms for the first time. In 2025, TeamViewer has been able to further extend its market-leading position and is currently the only best-in-class vendor in the PAC RADAR for connected worker platforms. PAC estimates that TeamViewer's Frontline Worker business grew by more than 20% in 2024. The strong business performance has been supported by several new customer projects in the last 18 months (Jan 2024 – May 2025).

Vision picking with smart glasses around warehouses and logistics centers is still the core use case for many new TeamViewer Frontline implementations at customers such as Samsung SDS (for European spare parts operations for Samsung Electronics), GlobalFoundries (for warehouses and inbound store facilities of the semiconductor manufacturer), Vandemoortele group (for warehouses around food services and retail customers), Volvo Group (for spare parts logistics around Volvo vehicles) and Brack.Alltron (for parcel logistics services in Switzerland).

However, TeamViewer is also able to demonstrate business growth outside vision picking in warehouses and logistics centers: One example is GE Aerospace, a supplier of aircraft engines. The company uses TeamViewer Frontline Upskill for realistic and cost-efficient remote training across its locations worldwide. Thanks to spatial computing technology, the solution allows aircraft technicians to interact with digital twins of aircraft and engines. Another example is Marposs, a provider of inspection and testing tools. After having used TeamViewer's remote support tools for several years, the company decided to implement the full TeamViewer Frontline Suite (Frontline Assist, Frontline Inspect, Frontline Make, and Frontline Pick) to provide advanced technical assistance to all its distributors around the world. Five Marposs sites and ten distributors are currently operating

© PAC 2025 – external reprint rights – TeamViewer –

the solution. This case underpins the cross-selling potential within TeamViewer's portfolio.

PAC sees three reasons why TeamViewer's strategy in the connected worker space is currently paying off so well: First, no other vendor in our comparison addresses today's most relevant use case, vision-based picking with monocular smart glasses, better than TeamViewer.

Second, TeamViewer started early to establish strong partnerships with other leading platform vendors and established integrated solutions with them. The most relevant partnership in this context is certainly SAP. For years, TeamViewer's Frontline platform has been integrated with various SAP solutions, such as SAP Enterprise Warehouse Management (SAP EWM), SAP Field Service Management, SAP Digital Manufacturing Platform (MES solution), and SAP Service and Asset Manager. Further relevant partnerships have been established with Siemens (Teamcenter PLM) and Manhattan Associates (warehouse management).

Third, continuous investments in TeamViewer's OT portfolio to provide new capabilities. Latest examples in this context include Smart Services and Frontline Upskill. TeamViewer introduced Smart Services in December 2024. The solution enables manufacturers of machinery and equipment to unify software and hardware support in one solution. It provides remote expert sessions with real-time subtitles translated in 130+ languages, transcriptions of service calls and session summaries (at beta stage today). It also allows for device-specific support requests via simple code scanning (scan to support). Frontline's spatial computing tools add 3D augmented reality capabilities to the Frontline platform. Frontline Upskill Editor is a no-code tool to create, e.g., immersive learning environments for industrial workers, while Frontline Upskill Workplace allows users to access them via mobile devices such as tablets and smartphones.

CareAR

In 2025, PAC has identified CareAR as a hidden champion in the European connected worker market. The company has an industry-agnostic approach, but has become increasingly relevant in the manufacturing sector. Core offerings include CareAR Instruct for digital work instructions, the Experience Builder to build work instructions via no-code, and CareAR Assist for remote expert support. The evaluation as hidden champion is especially based on continuous advancements of platform capabilities (including new use cases and new technologies like AI/AR) and strong partnerships with relevant companies, such as Xerox, ServiceNow, Salesforce, and several large consulting and system integration companies from India.

CareAR was acquired by Xerox in 2021. This acquisition has brought two key advantages for CareAR: On the one hand, Xerox is a global anchor client for the connected worker platform from CareAR. From our perspective, this is a real asset in the market as it allows to test new platform features at an early stage and at scale. Current enhancements include tools like virtual verification, to ensure compliance of procedures, digital forms and photo capture, to collect content from users, and a distance measurement tool within CareAR Assist. The availability of an anchor client can accelerate the go-to-market of new capabilities on an ongoing basis. On the other hand, Xerox also provides a strong financial background for investments. This led to the acquisitions of MagicLens, a 3D visualization and AR-based platform designed to showcase industrial products, and CraftAR, an AR embedded image recognition platform, in 2022.

Besides Xerox, CareAR received a $10 million equity investment from ServiceNow in 2022 and CareAR's connected worker platform became tightly integrated with ServiceNow's Field Service Management (FSM), Customer Support Management (CSM), and IT Service Management (ITSM) offerings. This underpins CareAR's strategic partnership with ServiceNow. In addition, CareAR is also integrated with Salesforce Service Cloud and Salesforce Field Service, two ticketing platforms for service management, and established partnerships with several large Indian-based consulting and system integration companies; especially with TCS, Infosys, and HCLTech, but also with L&T Technology, and Thirdera (today part of Cognizant). All of this positions CareAR as an evolving connected worker platform for large clients, complementing their existing ServiceNow and Salesforce field service and service management implementations. As a result, it is no surprise that we start to see a growing customer base in the industrial space across Europe, including companies such as, Sapphire Utilities (acquired by Lanes Group), ERT Technologies and a large German automotive supplier.

© PAC 2025 – external reprint rights – TeamViewer –

PAC INNOVATION RADAR "DIGITAL PLATFORMS FOR CONNECTED WORKERS IN EUROPE 2025"

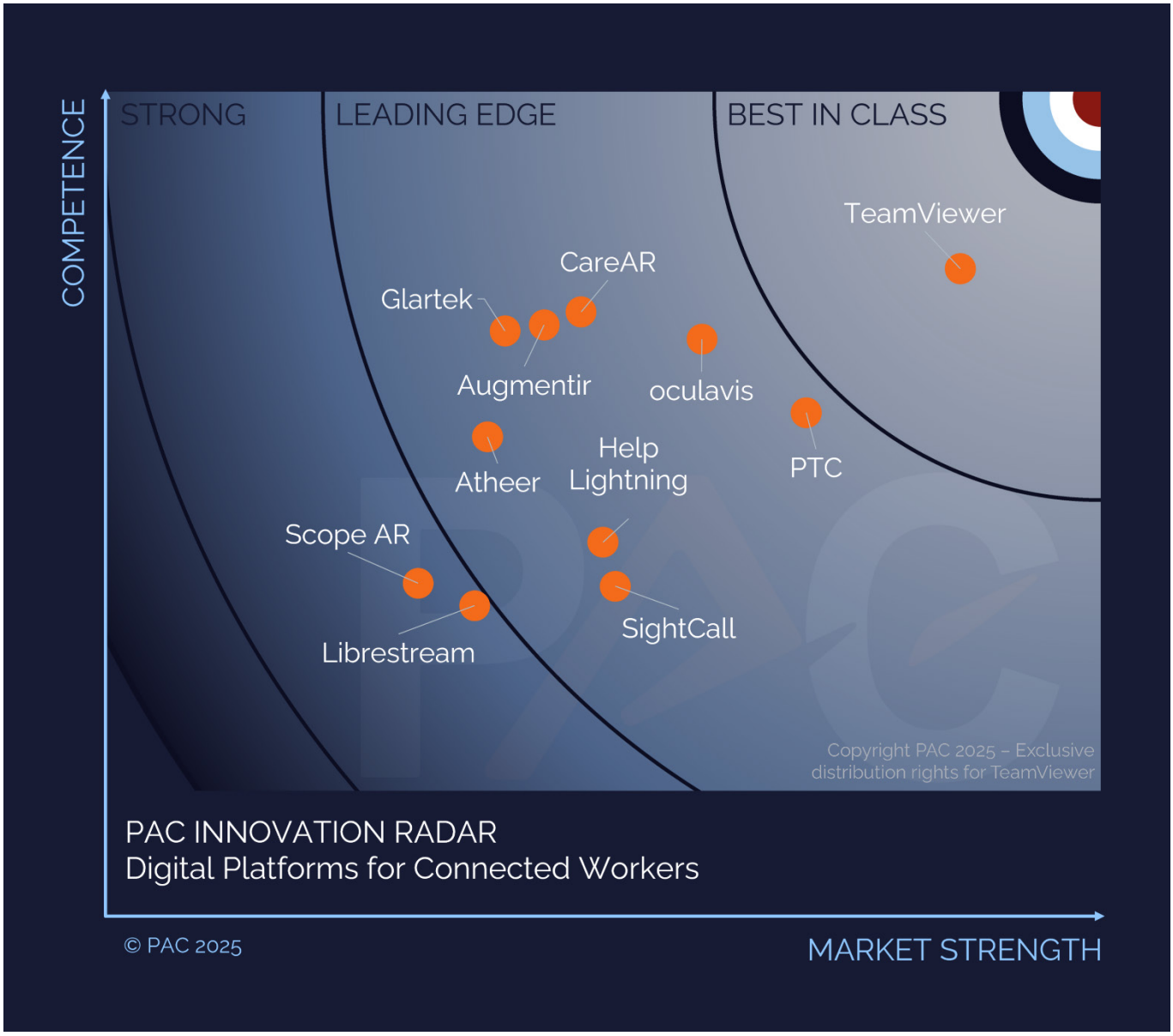


Fig. 11: PAC INNOVATION RADAR "Digital Platforms for Connected Workers in Europe 2025"

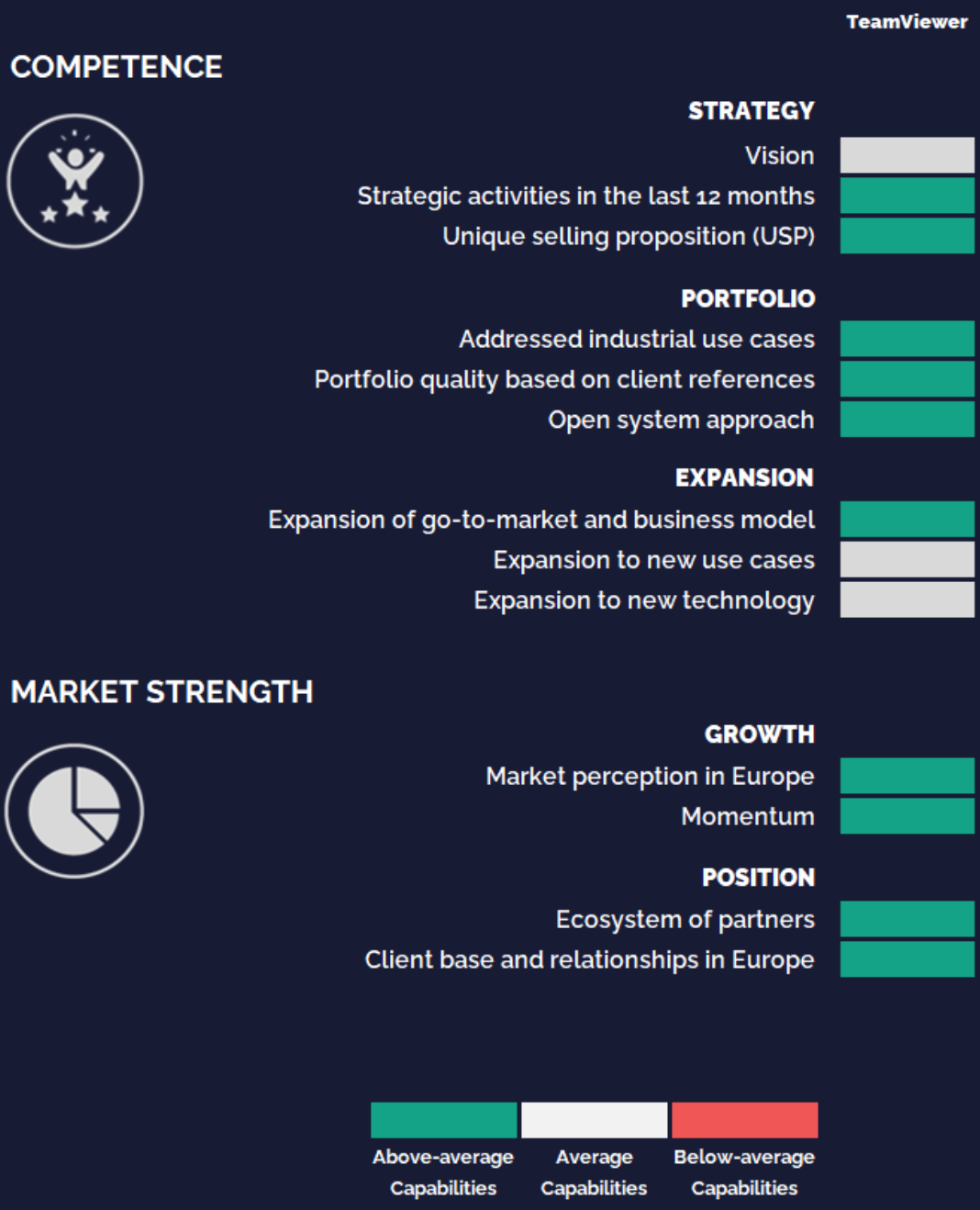
Based on the scores in competence and market strength, the overall score is calculated (calculation: competence score plus market strength score, divided by two). From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

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

RADAR

REVIEW OF TOP-SEEDED PROVIDER TEAMVIEWER

TeamViewer – Best in Class



© PAC 2025

– external reprint rights – TeamViewer –

RADAR

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/or 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.

Definitions & Segmentation

A **digital platform** provides digital tools for different use cases (more than one) and constantly strives to expand to new use cases and digital solutions to serve the holistic demand of its target audience. To achieve this, digital platform providers also integrate their partner ecosystem into the platform. A technical integration layer and a governance framework are helpful tools to ensure interoperability across different digital solutions on the platform.

A **vendor of platform-related services** provides digital consulting, system integration and managed services for industrial use cases around relevant platforms. They constantly strive to expand to new services and use cases to serve the diverse and holistic demand of their target audience. To achieve this, service providers need dedicated, platform-related expertise and a strong ecosystem of platform partnerships.

Specific PAC definitions used in this RADAR

Digital Platforms for:

Industrial edge management: These platforms use concepts from the IT world, such as container and virtualization technology and app store models, for simplified application lifecycle management at the industrial edge (OT world). In this space, apps around AI, machine vision and virtual PLCs gain further relevance. Machine builders and factory managers use these platforms to manage PLCs and IPCs across their installed-base of machines and factories.

An industrial data lakehouse: Industrial companies must overcome IT/OT data silos and prepare for the age of AI agents. A key enabler is the concept of the industrial data lakehouse, which allows the management of data across different data stores. The vision is to create a digitally-integrated manufacturing company without data silos, open data access, transparency across the company, flexible analytics capabilities, agile workflow development, and increasing automation.

Connected workers: Work instructions, visual guidance, digital support content and remote expert services for mobile, industrial workers are central capabilities of this type of platform.

AI-advanced industrial robotics: PAC evaluates platforms that combine hardware-independent AI and low-code/no-code capabilities around two dedicated use cases in the context of industrial robotics. First, advanced perception (object detection) for pick-and-place tasks via AI-enabled robot vision systems and foundation models. Second, AI-based robot control systems (motion planning and force control) for assembly and material processing tasks.

An integrated digital thread: An integrated digital thread ensures the flow of product-related data throughout different cloud-based business applications, from product design and development to manufacturing, maintenance and service. It enables organizations to break down product-related data silos, streamline workflows, and achieve interoperability across departments, functions, and systems. While PLM builds the centerpiece of an

© PAC 2025 – external reprint rights – TeamViewer –

integrated digital thread, vendors also provide in extension low-code application development capabilities and additional pre-integrated business applications, such as ERP, MES and Field Service Management (FSM). This enables an integrated flow of product-related data throughout the entire company. PAC provides transparency about cloud-based PLM vendors, with a well-integrated portfolio of cloud-based business applications and low-code capabilities to simplify the development of apps and the integration of product data into different business applications. These capabilities together build a platform for an integrated digital thread.

Platform-related Services for:

For industrial data lakehouses: As the concept of industrial data lakehouse is not simple to realize (for more details, please see the topic definition in the above platform section), PAC recommends working with leading C&SI's with proven expertise across various relevant platforms in this space. To provide market transparency around this topic, PAC here evaluates the expertise of C&SI's around the three relevant platforms Databricks, Snowflake and Microsoft Fabric.

For the industrial metaverse: PAC sees NVIDIA Omniverse as the market-leading platform to build the industrial metaverse today. As a result, PAC here evaluates the expertise of C&SI's around NVIDIA Omniverse.

With multi-PLM platform expertise: PLM is not a new topic, and several leading platforms have existed for years. While many C&SI's have strong capabilities around one or two of the leading PLM platforms, PAC wants to provide transparency about C&SI's with dedicated know-how across multiple PLM platforms. In this comparison, we focus on the PLM platforms from the four leading vendors Siemens, Dassault Systèmes, PTC and Aras.

Segmentation

PAC is going to evaluate the providers of digital platforms and services in Europe in eight PAC INNOVATION RADAR segments dedicated to specific use cases:

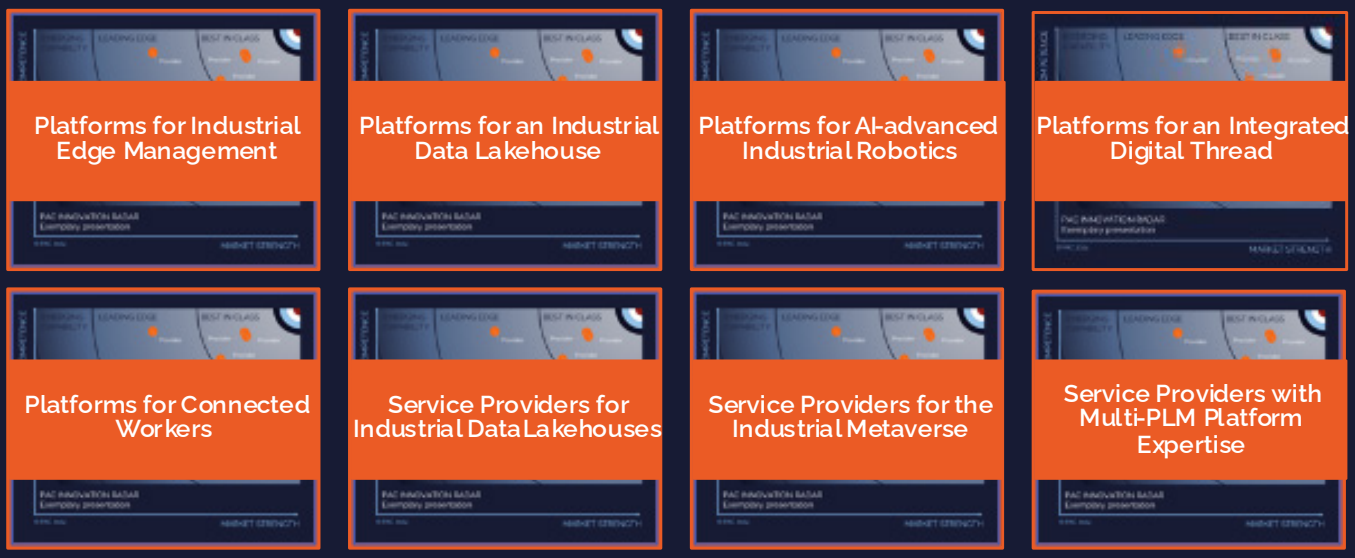


Fig. 12: PAC INNOVATION RADAR – segments analyzed

© PAC 2025 – external reprint rights – TeamViewer –

RADAR

Provider Selection and Participation

What 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.

Evaluation Method



Fig. 13: PAC INNOVATION RADAR – 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.

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.

© PAC 2025 – external reprint rights – TeamViewer –

RADAR

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

Digital Platforms for Connected Workers



Fig. 14: Connected Workers – evaluation criteria

© PAC 2025 – external reprint rights – TeamViewer –

PAC RADAR REPORT LICENSE

PAC INNOVATION RADAR "Digital Platforms for Connected Workers in Europe 2025"

Unlimited reprint rights

Within the framework of the license with unlimited reprint rights the customer receives a PAC RADAR short report, a PAC RADAR graphic, and a PAC RADAR badge. Their usage and distribution to external parties is expressly permitted, without any limitations. The customer is entitled to use the contents of this PAC RADAR short report as well as the PAC RADAR graphic and badge, either completely or partially (e.g., individual text sections or graphics), for all marketing and communications purposes.

In any usage and distribution, all contents of the PAC RADAR short report, the PAC RADAR graphic, and the PAC RADAR badge must always be marked with the "PAC" source reference. However, the contents must not be manipulated or deployed in such a way that changes the context.

The usage rights defined within the license with unlimited reprint rights refer to the PAC RADAR short report, the PAC RADAR graphic, and the PAC RADAR badge, however, under no circumstances include the usage of the contents of the full version of the PAC RADAR report.

Moreover, copyright conditions for the PAC RADAR apply (see About the PAC RADAR).

RADAR

ABOUT THE PAC RADAR

The PAC RADAR is protected by Pierre Audoin Consultants (PAC) GmbH's copyright.

The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

The selection, positioning, and characterization of companies within the PAC RADAR is not subject to any vested interests whatsoever. PAC does not support any providers that are represented in the PAC RADAR, and does not give any recommendations to technology users. The PAC RADAR represents a result from market research only and must not be taken as a recommendation for action.

The contents of the PAC RADAR have been created with utmost diligence and care. However, PAC cannot be held responsible for any errors or omissions.

PAC excludes all express or implied claims, also if derived from warranties with respect to the PAC RADAR report, including any implied warranties of merchantability or fitness for a particular purpose.

The PAC RADAR may only be used for a license fee and with the consent of PAC. Moreover, the use and publication of the contents and the results of the PAC RADAR are subject to the "Terms & Conditions for the Usage of Pierre Audoin Consultants' SITSI® License".

Copyright Pierre Audoin Consultants (PAC) GmbH 2025. All rights reserved.

ABOUT PAC

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

More on www.pacanalyst.com.