

TOP 25 IT Consulting and Systems Integration Companies in Germany 2008

Companies	Revenue in Million € in Germany		Number of Employees in Germany		Total Revenue in Million € (Only companies with headquarters in Germany)	
	2008	2007	2008	2007	2008	2007
1 IBM Global Business Services, Stuttgart *) 1)	1.325,0	1.225,0	8.800	8.100		
2 Accenture GmbH, Kronberg *)	780,0	735,0	5.000	4.300		
3 Lufthansa Systems AG, Kelsterbach *)	493,0	509,0	2.400	2.540	657,0	679,0
4 Capgemini Deutschland Holding GmbH, Berlin 2)	443,0	361,0	4.771	4.292		
5 CSC, Wiesbaden	391,0	365,0	3.000	3.000		
6 msg Systems AG, Ismaning/München	281,0	232,5	2.376	1.970	309,0	254,0
7 Logica Deutschland GmbH & Co. KG, Stuttgart	266,7	261,0	2.100	2.200		
8 Allgeier Holding AG, München 3)	215,0	175,0	1.990	1.750	223,0	181,0
9 Cirquent GmbH, München *)	202,2	244,8	1.534	1.535	260,1	285,8
10 ESG Elektroniksystem- und Logistik Gruppe, München	197,0	181,0	1.173	1.070	202,0	186,0
11 CI Group, Hamburg	170,0	146,0	1.010	980	170,0	146,0
12 GFT Technologies AG, Stuttgart	164,2	170,1	309	301	242,2	247,1
13 IDS Scheer AG, Saarbrücken *)	149,8	148,4	1.500	1.400	399,1	393,5
14 Tieto Deutschland GmbH, Eschborn 4)	146,0	152,0	1.226	1.346		
15 Materna GmbH, Dortmund	130,9	145,8	1.154	1.105	160,3	175,0
16 BTC Business Technology Consulting AG, Oldenburg	126,8	105,6	1.224	963	132,7	112,3
17 Itelligence AG, Bielefeld	114,3	96,3	748	642	216,6	190,9
18 Mieschke Hofmann und Partner GmbH, Freiberg *)	66,1	47,8	462	384	68,6	49,8
19 Syskoplan AG, Gütersloh	60,8	57,5	416	395	60,8	57,5
20 Adesso AG (Gruppe), Dortmund	59,1	40,4	474	371	66,8	45,6
21 Seven Principles AG, Köln 5)	53,7	47,1	425	362	59,1	51,4
22 CIBER Novasoft AG, Heidelberg	51,1	42,9	291	253		
23 Cellent AG, Stuttgart	50,0	42,0	390	350	55,0	50,0
23 CS Consulting AG, Hannover 6)	50,0	37,0	170	135	50,0	37,0
25 Danet Group, Weiterstadt 7)	37,8	46,9	388	410		

The current
Lünendonk® List 2009

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- 1) 2007 and 2008 including SerCon and IT-Services und Solutions
- 2) without management consulting; 2007 and 2008 incl. sd&m and Sogeti Deutschland
- 3) 07/2008 Acquisition TOPjects AG
08/2008 Acquisition Ixtra AG 12/2008 Acquisition Next GmbH, respectively with consideration of total revenues in 2007
- 4) up to 03/2009 TietoEnator Deutschland GmbH
- 5) up to 12/2007 Tecon Technologies
- 6) 11/2008 Acquisition I&S IT-Beratung & Services GmbH, Dortmund
- 7) 01/2009 Acquisition by Devoteam

*) Revenue and/or employee figures partially estimated.

Admission criteria for this list: More than 60 percent of revenue generated by IT consulting, custom software development and systems integration.

The ranking is based on verified information provided by the companies themselves as well as on estimates by Lünendonk GmbH, regarding revenues entered in the balance sheet/generated in Germany.

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LÜNENDONK® LIST 2009:

TOP 25 IT CONSULTING AND SYSTEMS INTEGRATION

COMPANIES IN GERMANY

Kaufbeuren, May 20, 2009.-- Demand on the German market for IT consulting and systems integration continued to grow in 2008 compared to 2007 by 6.9 percent, despite the weak economic development in the last months of 2008 caused by the economic crisis. According to the German Association for Information Technology, Telecommunications and New Media, Bitkom, the market reached a total volume of 16 billion euros (2007: 15 billion euros).

The IT consulting and systems integration companies which Lünendonk GmbH, Kaufbeuren, determined to be the Top 25 in respect of their 2008 revenues in Germany and earned respectively minimum 60 percent of their revenues in IT consulting and systems integration as well. They achieved altogether **domestic revenue** of 6 billion euros in 2008, which was nearly 38 percent of the relevant German domestic market (16 billion euros) in 2008.

The Top 25 IT Consulting and Systems Integration Companies are not ranked by amount of total revenues but by their domestic revenues in Germany. This structure provides better comparability of the vendors concerning their position on the German market. In addition, the global revenues of companies with German headquarters are listed in the rankings as well. However, this modification in the system of ranking means that German IT consulting and systems integration providers which demonstrate their international presence and competitiveness by means of major shares of international sales appear further down in the ranking ordered by domestic revenues.

For various reasons, the current Lünendonk[®] List of the Top 25 IT Consulting and Systems Integration Companies again displays a series of changes. Unlike the Lünendonk List 2008, the IT-Services and Solution GmbH, Chemnitz, and the SerCon Services-Konzepte für Informations-Systeme GmbH, Ehningen, are no longer ranked, as they have been integrated into their parent company IBM Global Business Services, Stuttgart. The sd&m Software Design & Management AG, Munich, since 2008 is embodied in the numbers of its parent company Capgemini Deutschland Holding GmbH, Berlin. The Unisys Deutschland GmbH, Sulzbach, because of modified services focuses appears on the Lünendonk[®] List of the Leading IT Services Companies.

In place of these, the Adesso AG (Group), Dortmund, the Ciber Novasoft AG, Heidelberg, the Cellent AG, Stuttgart, and the CS Consulting AG, Hannover, have newly moved up onto the list of Top 25 IT Consulting and Systems Integration Companies. Since 2008, the Tecon Technologies AG, Cologne, operates under the name of Seven Principles AG.

In respect of the changes in **domestic revenues** in 2008 compared to that of 2007, in part enormous differences between the companies can be made out. They range from plus 46.3 to minus 19.4 percent. On an average, the domestic revenues of the Top 25 IT Consulting and Systems Integration Companies increased by 11.0 percent. Only six of the 25 companies in 2008 had to accept lower total revenues than in 2007.

The global financial and economic crisis in 2008 obviously had not yet seriously affected the business of the large German IT consulting and systems integration companies.

However, the strategies and forecasts for the near future bear witness to articulate signs of crisis. For the current year 2009, the Top 25 IT Consulting and Systems Integration Providers expect an average individual revenue growth of just 2.7 percent. For the overall IT consulting market, they quasi even expect stagnation (+0.5%). Yet, in consideration of medium-term development (2009-2014), the large IT consulting and systems integration companies remain optimistic. Their prognoses for this period on average move around 5 percent p.a. Individual company revenues are forecasted to grow on average by 7.6 percent p.a. between 2009 and 2014.

In 2008, more than 43,000 people were employed by the Top 25 IT Consulting and Systems Integration Companies in Germany. This signifies an increase of about 3,200 compared to 2007. Although revenues increased somewhat more intensely than the number of employees, the averaged revenue per capita with about 156,000 euros by and large remained on the same level as in 2007.

Lünendonk GmbH is about to publish detailed results in a comprehensive study on the “Leading IT Consulting and IT Services Companies in Germany – with Extra Chapters Concerning Business Innovation/Transformation Partners (BITP), Standard Software and Business Intelligence“, including altogether about 150 suppliers, in August 2009 at a price of 1,800 euros (including postage and handling, exclusive of VAT).