

PRESS RELEASE

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LÜNENDONK RANKING OF THE LEADING INTERNAL IT SERVICE PROVIDERS IN GERMANY

- **Top 10 generate around 13 billion euros in revenue in 2022 and employ over 55,000 people**
- **Internal IT service providers given increased budgets for digital transformation**
- **Lünendonk ranking of the leading internal IT service providers now available free of charge**

Mindelheim, 7 July 2023 – Internal IT service providers form an essential piece of the digitisation puzzle within companies. Growing digitisation budgets and revenues among the so-called captive IT service providers reflect this. For the third time now, Lünendonk has published a ranking of the leading internal IT service providers by revenue. The mix of captive and outsourced arrangements – what proportion of IT resources is provided by internal staff or external service providers – varies greatly. Navigating the digital transformation successfully requires optimum interaction between both parties.

The Lünendonk Ranking 2023 “Leading Internal IT Service Providers in Germany” provides an overview of the ten largest captive IT service providers in Germany. Included are those companies that generate more than 90 per cent of their revenues from IT services within an organisation – such as operating applications, infrastructure and the cloud, IT consulting, software development and system integration as well as IT provider management –and which are legally independent companies. Legal entities

under public law such as public institutions are not included. Since some of the figures for DAX-40 internal IT service providers and other groups are unavailable and cannot be estimated with sufficient certainty, our ranking makes no claim to completeness and is thus not presented as a Lünendonk List. The ranking is based on total revenues for the year 2022.

Rankings at a glance

Allianz Technology SE is ranked first with estimated revenues in 2022 of 2.3 billion euros. Also in the top three are Finanz Informatik (€2.26 billion) and Atruvia (€1.86 billion), two further companies from the financial sector: Finanz Informatik is the digitalisation partner of the Sparkassen-Finanzgruppe, Atruvia the IT service provider of the Volks- und Raiffeisenbanken which until 2021 operated under the name Fiducia & GAD.

Fourth place goes to BWI, IT systems arm of the German Armed Forces, with revenues of almost 1.5 billion euros and over 6,000 employees. DB Systel (€1.3 billion), the IT subsidiary of Deutsche Bahn, takes fifth.

Schwarz Group subsidiary Schwarz IT KG ranks sixth with estimated revenues of 1.15 billion euros. Schwarz IT in turn owns StackIT, currently offering its own sovereign public cloud compliant with EU data protection regulations to the market. Ninth place belongs to a grocer, Aldi International Services, with estimated revenues of 800 million euros in 2022.

Equally coming in below the one billion euro mark – albeit only just – are E.ON Digital Technology (seventh place, €949 million in revenues) and Deutsche Post IT Services (eighth place, €856 million). Rounding out the top 10 is Bitmarck, IT service provider for the statutory health insurers, with revenues of 369 million euros.

Taken together, these ten service providers generate revenues of approximately 13 billion euros, employing over 55,000 people. For 2023, the internal IT service providers surveyed expect revenue growth of around 11 per cent. These captive IT service providers are experiencing significant demand from their internal customers, especially in the areas of IT modernisation, cloud transformation, data & analytics and process automation.

‘After an intensive phase of IT outsourcing, especially in the 1990s and 2000s, many internal IT service providers are now growing in importance as a result of digitalisation,’ notes Tobias Ganowski, consultant at Lünendonk & Hossenfelder, considering the market. ‘The central future tasks of internal IT service providers include modernising the legacy IT that has developed over the years in many corporations, future-proofing IT setups and developing differentiating software solutions. The shortage of skilled labour is a major challenge here. Without the use of external IT service providers, these tasks cannot usually be completed successfully. In order to ensure their ability to deliver, companies must therefore develop strategic service partners, tying them in for the long term,’ adds Ganowski.

About the Ranking and Lünendonk Survey

The new Lünendonk Ranking 2023 “Leading Internal IT Service Providers in Germany” is now available as a free download from www.luenendonk.de/en. It forms part of the Lünendonk Survey 2023 “The Market for IT Services in Germany”, for which around 120 IT managers from upper mid-market and larger companies and corporations were polled, along with approximately 100 IT services providers. The publication provides IT service providers and their customers with important key indicators and comprehensive information to aid their planning. The Survey is expected to be made available free of charge from www.luenendonk.de/en at the end of July 2023.

Company profile

Lünendonk: background information

Based in Mindelheim (Bavaria), Lünendonk & Hossenfelder has been analysing the European business-to-business (B2B) services markets since 1983. Its market researchers focus on business and digital & IT consulting, audit, tax & advisory consulting, real estate services and the staffing industry (temporary staffing, IT workforce).

The company’s portfolio includes surveys, publications and benchmarks, and consultancy on trends, pricing, positioning or contracting procedures. This large data pool gives Lünendonk access to unique insights for advising clients. Regarded as market barometers, the Lünendonk® Lists and Surveys have been published by the market research and consulting company for decades now.

With years of experience, deep understanding, a brilliant network and – last but by no means least – a passion for people and market research, Lünendonk and its consultants are sought-after among service providers, their customers and indeed journalists for their expertise. Every year, Lünendonk partners with a jury from the media to honour deserving companies and entrepreneurs with the Lünendonk Service Awards.

Further information

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