Business Application Services I Europe I 2022

Salesforce-Related Services in Europe: The Energy & Utilities View

SITSI® I Vendor Analysis I PAC INNOVATION RADAR

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PAC RADAR
Salesforce - Related Services for Energy & Utilities in Europe
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INTRODUCTION

Salesforce-related Services in Europe: One of the most dynamic ecosystems of professional services suppliers in the region's digital services market.

Salesforce continues to be one of the fastest-growing enterprise software vendors in Europe. The company's revenue in the region rose by 34% to more than **€6bn** in the 12 months ending January 2022, making it the company's fastest-growing territory. The company recently confirmed it is on track to exceed growth of 20% for 2023, with Europe a key growth driver.

This has created a major opportunity for its partner ecosystem, which already incorporates more than **500** advisory, implementation and development partners in the region. PAC expects European businesses to spend more than **€6bn** on Salesforce-related consulting and systems integration this year.

Salesforce has cultivated a large and diverse ecosystem of partners supporting its clients in Europe, ranging from large global consulting and system integration firms to regional partners and specialist players.

A wave of consolidation has played out over the last five years as key Salesforce partners ramp up their teams of experts through acquisitions. But despite this, a healthy community of smaller, specialist players continue to thrive.

Customers have a lot of potential suppliers at their disposal, and this report aims to help them navigate the ecosystem to find the best partner for their requirements.

Salesforce relies on these partners to accelerate its customers' time-to-value and help them harness the vendor's growing importance at the heart of their business. The company has expanded its range of offerings with the acquisition of Slack, Tableau and MuleSoft, and the launch of new services such as the Net Zero Cloud.

But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As businesses become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

Salesforce has doubled-down on its industry go-to-market approach and as we have found in this analysis, we see many of the vendor's partners following suit with the creation of industry-specific consulting and delivery teams, practices and assets.

Customers are placing new demands on their Salesforce services partners, and the ones that evolve to help them extend the platform into the heart of their business will be the ones that thrive.

SALESFORCE IN EUROPEAN ENERGY & UTILITIES

Europe's energy and utilities sector is battling a perfect storm of challenges.

The Russian invasion of Ukraine, coupled with rising demand for energy in the post-pandemic era has led to a surge in wholesale oil and gas prices amid rising demand.

This in turn has led to State intervention in the pricing of strategies of utilities in several European countries, the collapse and consolidation of many smaller utility providers, and a renewed focus on how organizations can support their customers over what is set to be an incredibly challenging period.

At the same time, energy and utility organizations are accelerating their journey to low emissions energy sources – partly in response to the ongoing volatility in gas prices, but also to meet the demands of regulators, customers and shareholders in delivering on the Net Zero agenda.

Technology will play a key role in helping organizations to adapt to these market dynamics, and Salesforce has already emerged as one of the preferred platform providers to enable digital transformation.

Many European energy and utility organizations now leverage Salesforce's core CRM platform to provide a customer-centric view across multiple services. The vendor's field services solutions have also built strong momentum in the space as companies look to transform the experience of their service and asset management teams.

The existing presence of vlocity in the E&U sector gives Salesforce a good platform on which to build with the Industry Cloud proposition, although this is one area where it will work closely with its consulting and IT services partner ecosystem to build the necessary bridges to meet the client's specific requirements.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European energy and utilities sector.

Selected Key Salesforce Accounts in the European Energy & Utilities Sector

PAC INNOVATION RADAR GRAPH

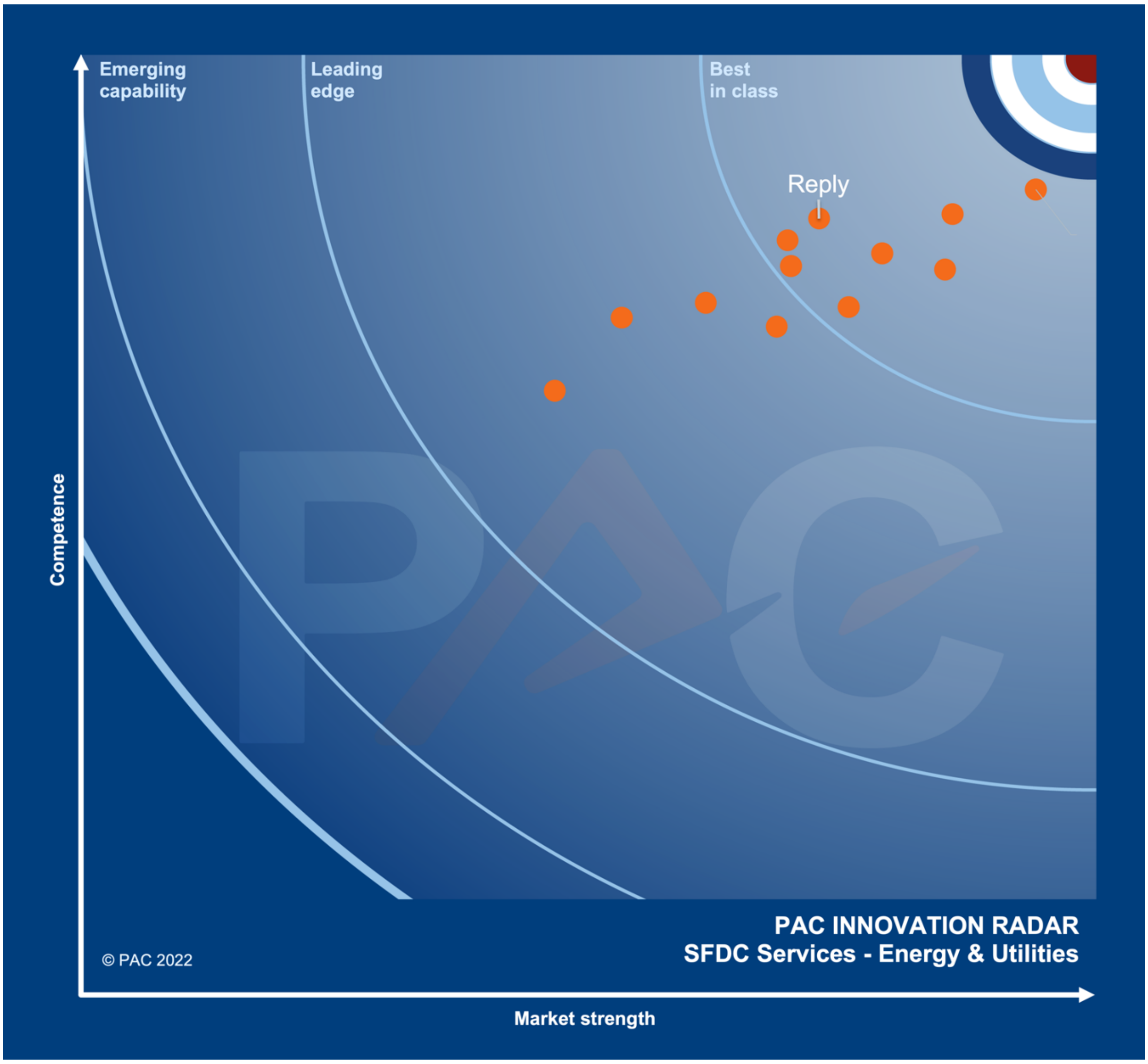

Fig. 1: PAC INNOVATION RADAR graph

Reply

PAC INNOVATION RADAR – Salesforce Services in Europe 2022

The Energy & Utilities View

Key Strengths (Industry Specific)

- **Domain Expertise:** Reply has deep domain expertise in this sector, built around the Power Reply business, which brings together more than 200 professionals delivering business and technology transformation programmes for energy and utilities companies in France, Germany, Italy and the UK.
- **Strong References**: From a Salesforce perspective, the company is particularly strong in Italy where it has supported a large number of projects using teams from both Power Reply and Arlanis Reply.
- **Salesforce Accreditation**: The company has several current projects in this sector and has earned a specialist level accreditation from Salesforce in "Utilities" based on its recent client engagements.

Key Strengths (General)

- **Scale:** Reply is one of the fastest growing IT services providers in the world, increasing its revenue by close to 67% over the last five years to €1.48bn. The company's Salesforce practice is expanding at a strong rate.
- **Collaboration with Salesforce**: Reply works closely with Salesforce in its target industries and territories, from sales and pre-sales, through to consulting, implementation, integration and customer success and services. The company is a permanent member of the Cloud Elite/Trailblazer Pre-Sales Program.
- **Industry and Technical Expertise**: Reply's Salesforce capability is concentrated within the Arlanis Reply division, which was based around the acquisition of premier Consulting partner Arlanis in 2012. The company also leverages other experts from across the Reply network to support Salesforce-related projects with project consulting, implementation, support and innovation development in areas such as Big Data, IoT and ML.
- **Assets & Frameworks:** Reply has developed a number of frameworks, tools and best practices to accelerate their clients' time-to-value with their Salesforce investments. These include the Facility Cloud, a Salesforce framework with integrated CAD functionality.

Growth Opportunities
• **Regional Expansion:** Reply has potential to build on its strong base of business in Italy to support the customer service modernization programmes that are in progress in territories such as the UK and Germany, prompted by the huge level of volatility in the energy retail space.

OBJECTIVE OF THE PAC 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 performance and competencies within specific market segments.

Each PAC INNOVATION RADAR focuses on a certain IT services segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC INNOVATION RADAR is free of charge.

All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews.

PAC reserves to also evaluate and position those providers in the PAC INNOVATION 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 INNOVATION RADAR.

The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" main clusters. Within the PAC INNOVATION RADAR the following applies: The closer a company is to the center, the closer they are to meeting customers' requirements.

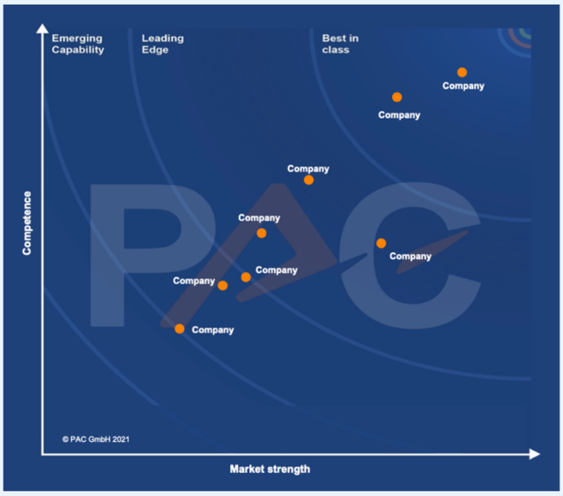

Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC INNOVATION RADAR?

Providers are selected and invited according to the following criteria:

- Positioning and business activities 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 actively participate?

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 operators in the segment under consideration

The concept

Evaluation of criteria at cluster and subcluster levels					
Main Cluster	Competence			Market strength	
Cluster	Strategy	Portfolio	Go-to-market	Market position	Market growth

Fig. 3: 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 report-card score within the peer group of the positioned providers.

This is based on:

- Dedicated face-to-face interviews with the providers about resources, distribution, delivery, portfolio, contract drafting, pricing, customer structure, client references, investments, partnerships, certifications, etc.;
- The analysis of existing PAC databases;
- Secondary research;
- If applicable, a poll among customers by PAC.

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.

General PAC research method

The following overview describes PAC's research method for market analysis and key differentiation features.

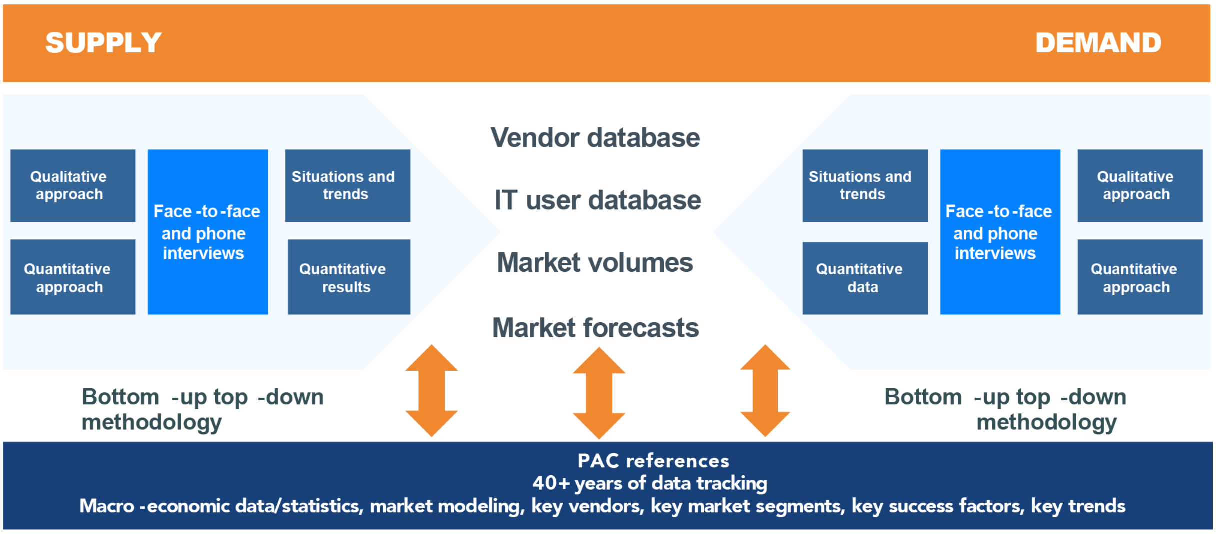

Fig. 4: Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC's methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

Positioning within the PAC INNOVATION RADAR

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 INNOVATION RADAR. Here, the following applies: The closer a provider is to the upper right corner, the closer they are to meeting customers' requirements for that segment.

The classification of providers is based on the overall score:

"Best in Class"	1.0 – 1.9
"Leading Edge"	2.0 – 2.9
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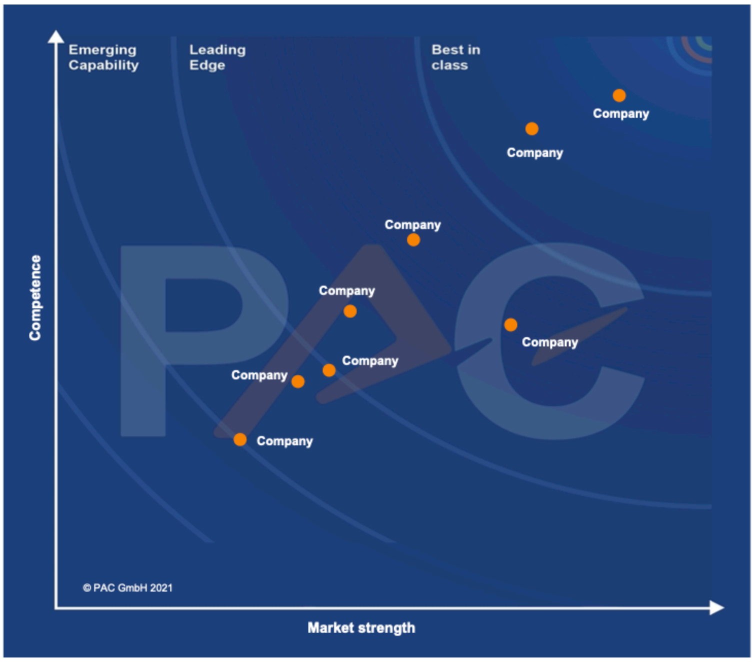

Fig. 5: Classification of providers in the PAC INNOVATION RADAR graph (example)

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Salesforce-Related Services in Europe: The Financial Services View

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Salesforce - Related Services for Financial Services in Europe
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But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As businesses become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

Salesforce has doubled-down on its industry go-to-market approach and as we have found in this analysis, we see many of the vendor's partners following suit with the creation of industry-specific consulting and delivery teams, practices and assets.

Customers are placing new demands on their Salesforce services partners, and the ones that evolve to help them extend the platform into the heart of their business will be the ones that thrive.

SALESFORCE IN EUROPEAN FINANCIAL SERVICES

The financial services sector represents one of the largest Salesforce customer groups in Europe.

The digital revolution that has transformed the sector over the last decade has seen many organizations leverage the Salesforce platform as way to transform their customer-facing activities, and manage their service portfolios across multiple channels.

Santander is one of Salesforce's best-known references in this sector, and it worked with the vendor to transform its view of customer interactions, implementing a single dashboard to see every request, complaint, and opportunity, which helped to free up to 15 hours of time for each client relationship team each week.

Salesforce is becoming entrenched in its clients' core business processes. In the insurance space, it is now being used by carriers in the region to process claims and manage customer policies. Banks are using it as the platform on which they launch and operate new digital banking services.

Financial services organizations are increasingly looking to re-platform their complex back- and middle-office application workloads in order to keep pace with their customers' changing needs and preferences.

As Salesforce fills out its integration and AI capabilities through acquisitions and new product development, it is becoming an increasingly attractive option for financial services businesses looking to transform at speed.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European financial services sector.

Selected Key Salesforce Accounts in the Financial Services Sector

PAC INNOVATION RADAR GRAPH

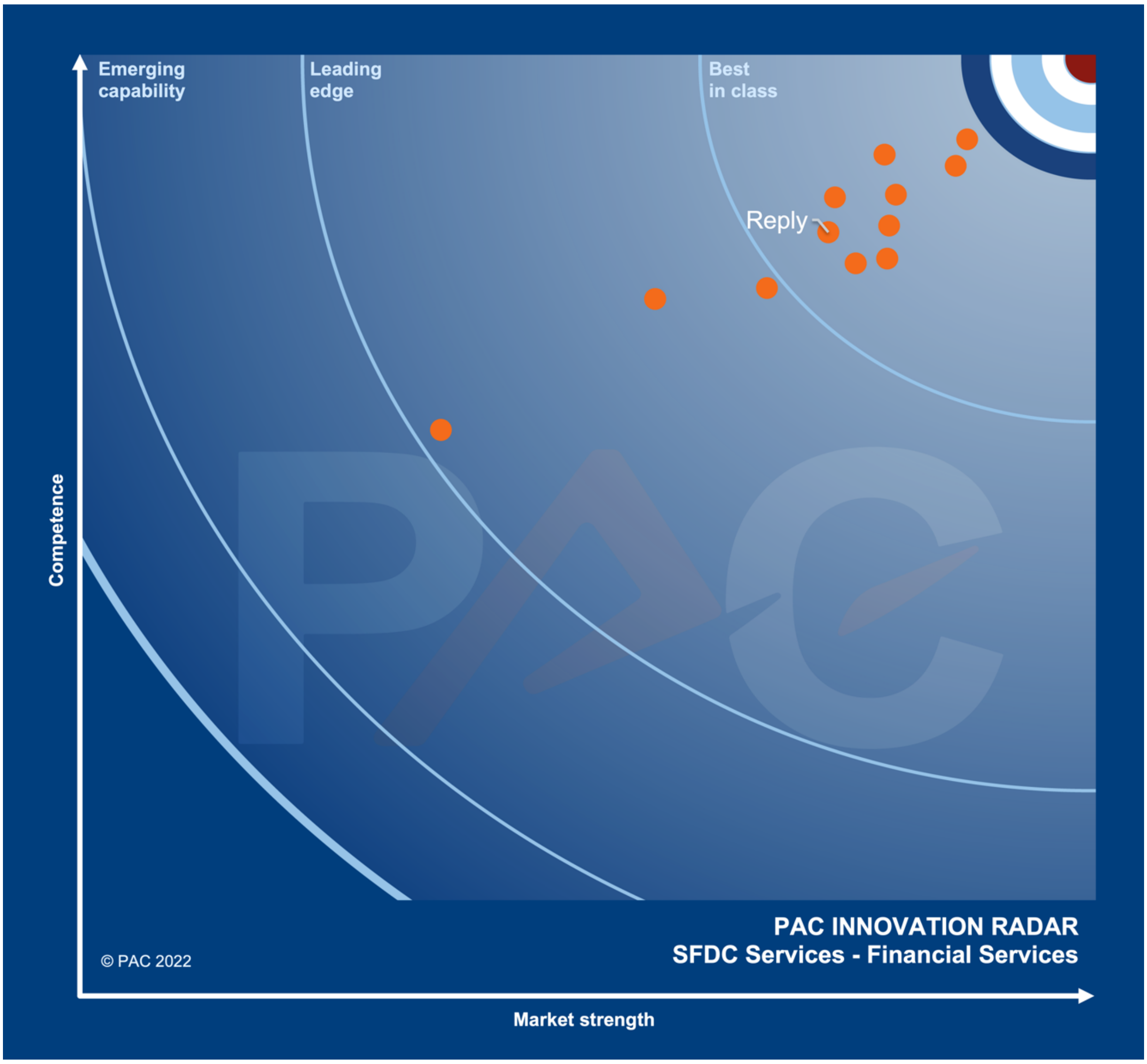

Fig. 1: PAC INNOVATION RADAR graph

Reply

PAC INNOVATION RADAR – Salesforce Services in Europe 2022
The Financial Services View

Key Strengths (Industry Specific)

- **Domain Expertise:** Reply has deep domain expertise in the financial services sector, with an advisory and digital services portfolio that supports the transformation agenda of banks and insurance companies across a broad range of topics including compliance, service modernization and digital transformation.
- **Strength of References**: The vendor is currently working on major, multi-cloud Salesforce projects at one of Europe's leading motor finance specialists, and one of the region's largest insurance carriers. Reply works closely with Salesforce in this sector, participating in the strategic Financial Services Round Table and similar boards in Italy.
- Based on the company's past projects in this sector, Reply has earned the Salesforce specialization for the "Financial Services" industry and also for "Insurance."
- **Thought Leadership**: Reply has a growing brand in this market as a cloud services partner through the research it has published around cloud adoption and barriers among European financial services organizations.

Key Strengths (General)

- **Scale:** Reply is one of the fastest growing IT services providers in the world, increasing its revenue by close to 67% over the last five years to €1.48bn. The company's Salesforce practice is expanding at a strong rate.
- **Collaboration with Salesforce**: Reply works closely with Salesforce in its target industries and territories, from sales and pre-sales, through to consulting, implementation, integration and customer success and services. The company is a permanent member of the Cloud Elite/Trailblazer Pre-Sales Program.
- **Industry and Technical Expertise**: Reply's Salesforce capability is concentrated within the Arlanis Reply division, which was based around the acquisition of premier Consulting partner Arlanis in 2012. The company also leverages other experts from across the Reply network to support Salesforce-related projects with project consulting, implementation, support and innovation development in areas such as Big Data, IoT and ML.

Key Strengths (General)
• **Assets & Frameworks:** Reply has developed a number of frameworks, tools and best practices to accelerate their clients' time-to-value with their Salesforce investments. These include the Facility Cloud, a Salesforce framework with integrated CAD functionality.

Growth Opportunities
• **Regional Expansion:** Reply is currently supporting the UK division of a major global insurance group in the development and implementation of a Mulesoft strategy, and it is looking to build on this momentum and the large network of customers and contacts among UK financial services customers, to make a push around its Salesforce-related expertise in the country.

OBJECTIVE OF THE PAC 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.

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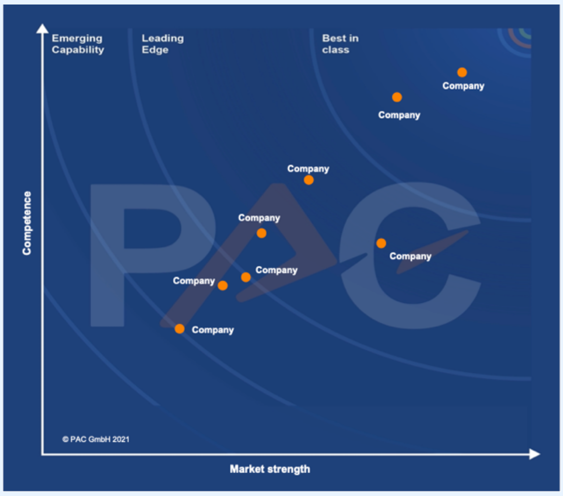

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- Participation ensures that PAC has access to the largest possible range of specific and up-to-date data as a basis for the assessment;
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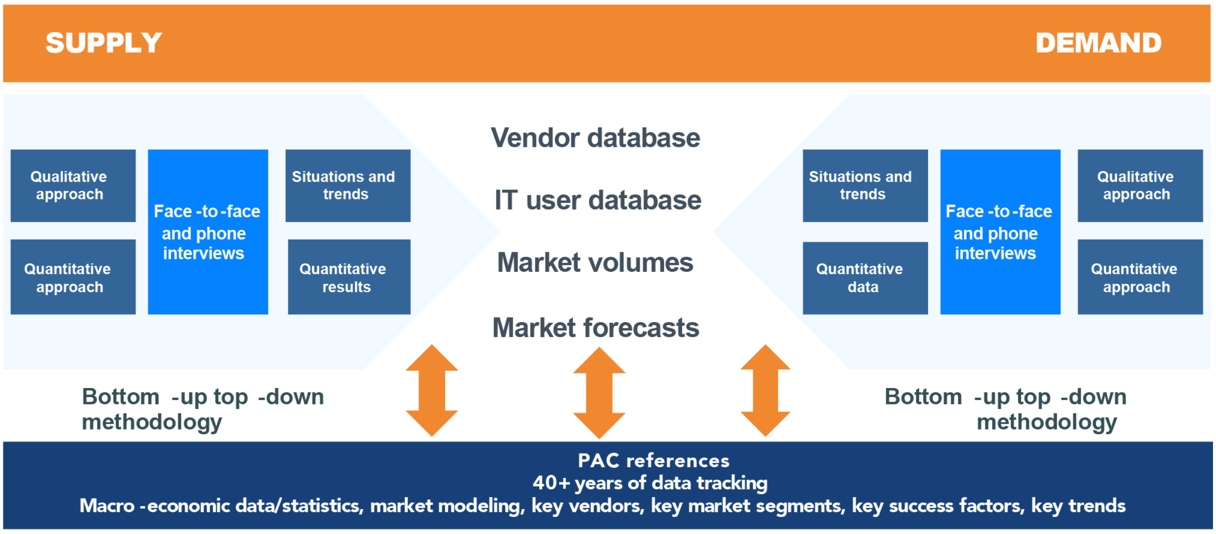

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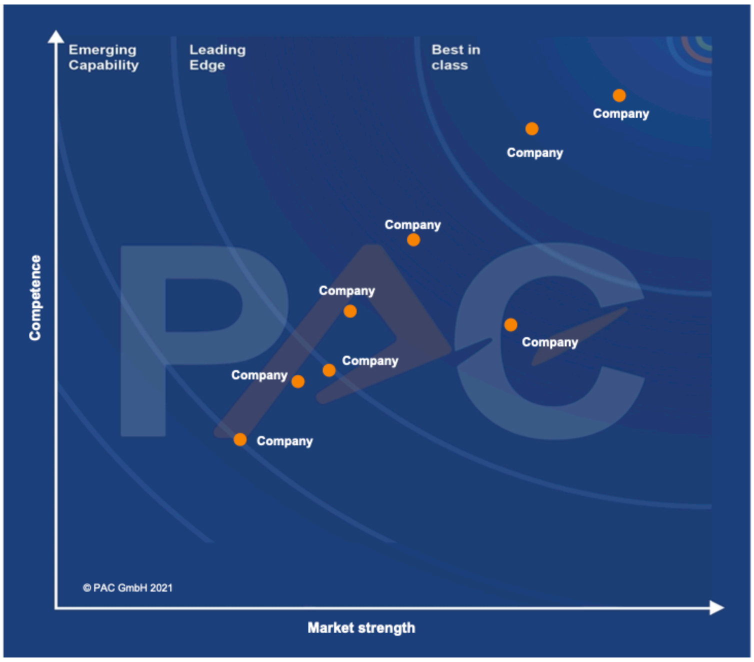

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But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As businesses become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

Salesforce has doubled-down on its industry go-to-market approach and as we have found in this analysis, we see many of the vendor's partners following suit with the creation of industry-specific consulting and delivery teams, practices and assets.

Customers are placing new demands on their Salesforce services partners, and the ones that evolve to help them extend the platform into the heart of their business will be the ones that thrive.

SALESFORCE IN EUROPEAN COMMS & MEDIA

The pace of change is accelerating in Europe's telecoms and media sector.

Over two thirds of the region's operators have now deployed 5G, with more than half having rolled out 5G networks. This is encouraging many communications service providers (CSPs) to change their positioning from connectivity providers to providers of connected experiences enabled by 5G.

At the same time, incumbents such as BT and Telecom Italia have undertaken far-reaching transformation programmes to simplify and automate operations in order to give them the agile core they need to speed time-to-market and improve the customer experience.

In the streaming age, the lines between telecoms and media organizations have never been more blurred, as competition in the lucrative digital content market intensifies. Many of the region's media organizations have experienced a challenging time due to fluctuating advertising spend, and with further volatility on the horizon, many are striving for greater flexibility.

Communications and media has become one of Salesforce's strongest industry sectors in Europe, as businesses from all areas of the market adopted its customer-facing propositions to build a level of insight that their legacy CRM systems could not deliver.

But Salesforce is also getting deeper into its clients' core industry processes. In the telecoms space for example, many companies are rethinking their wider Business Support Systems (BSS) strategy which covers not just CRM but order capture and billing as well.

The ongoing wave of operator consolidation is often a major trigger for a change in direction, and Salesforce, and its wider partner ecosystem, are positioning to support these modernization initiatives.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European communications and media sector.

Selected Key Salesforce Accounts in the European Communications & Media Sector

PAC INNOVATION RADAR GRAPH

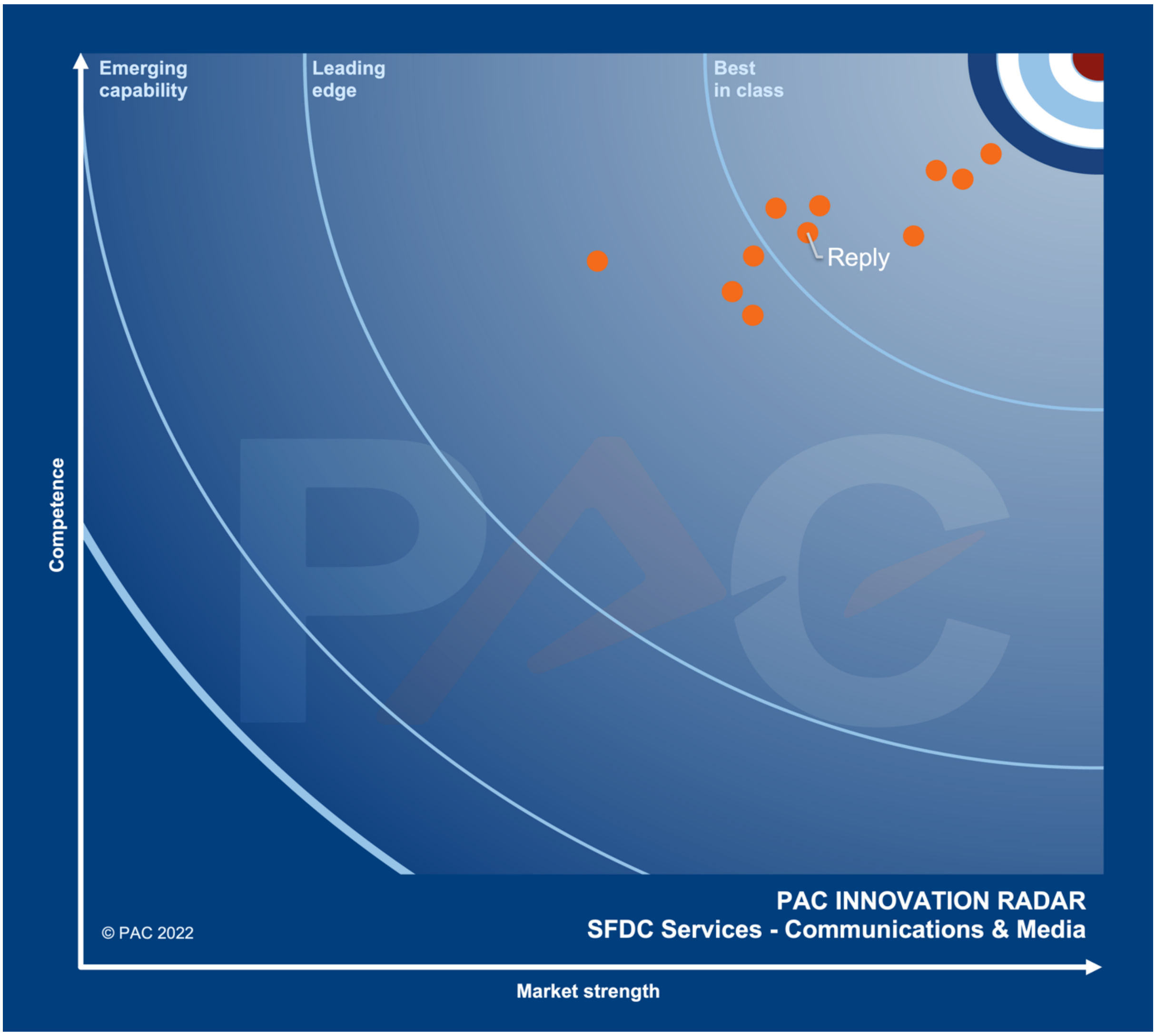

Fig. 1: PAC INNOVATION RADAR graph

Reply

PAC INNOVATION RADAR – Salesforce Services in Europe 2022

The Communications & Media View

Key Strengths (Industry Specific)
• **Domain Knowledge:** Reply has a strong pool of domain expertise in this sector, concentrated around the Sytel Reply operation, which focuses on systems integration services around Business Support Systems (BSS) and Operating Support System (OSS) platforms. • **Strength of References**: From a Salesforce perspective, the vendor has delivered what was, at the time, the largest implementation of Salesforce in the communications sector, with a major telecoms and broadband provider in Southern Europe. • **Salesforce Recognition**: The successful delivery of this engagement and other recent projects in this field helped Reply to earn a "Specialist" level accreditation from Salesforce for the "Media & Entertainment" sector.

Key Strengths (General)
• **Scale:** Reply is one of the fastest growing IT services providers in the world, increasing its revenue by close to 67% over the last five years to €1.48bn. The company's Salesforce practice is expanding at a strong rate. • **Collaboration with Salesforce**: Reply works closely with Salesforce in its target industries and territories, from sales and pre-sales, through to consulting, implementation, integration and customer success and services. The company is a permanent member of the Cloud Elite/Trailblazer Pre-Sales Program. • **Industry and Technical Expertise**: Reply's Salesforce capability is concentrated within the Arlanis Reply division, which was based around the acquisition of Premier Consulting partner Arlanis in 2012. The company also leverages other experts from across the Reply network to support Salesforce-related projects with project consulting, implementation, support and innovation development in areas such as Big Data, IoT and ML. • **Assets & Frameworks:** Reply has developed a number of frameworks, tools and best practices to accelerate their clients' time-to-value with their Salesforce investments. These include the Facility Cloud, a Salesforce framework with integrated CAD functionality.

Growth Opportunities
• **Regional Expansion:** Reply has a strong brand and platform of business in the Italian market for its Salesforce experience, that it can leverage in other territories such as the DACH region.

OBJECTIVE OF THE PAC 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 performance and competencies within specific market segments.

Each PAC INNOVATION RADAR focuses on a certain IT services segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC INNOVATION RADAR is free of charge.

All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews.

PAC reserves to also evaluate and position those providers in the PAC INNOVATION 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 INNOVATION RADAR.

The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" main clusters. Within the PAC INNOVATION RADAR the following applies: The closer a company is to the center, the closer they are to meeting customers' requirements.

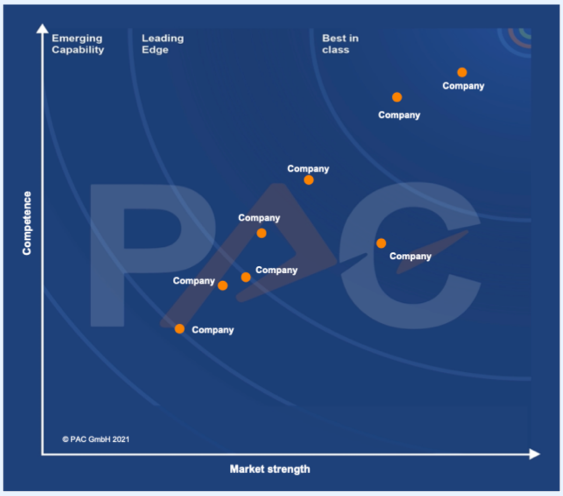

Fig. 2: PAC INNOVATION RADAR graph (exemplary presentation)

PAC RADAR EVALUATION METHOD

Provider selection & participation

Which providers are positioned in the PAC INNOVATION RADAR?

Providers are selected and invited according to the following criteria:

- Positioning and business activities 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 actively participate?

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 operators in the segment under consideration

General PAC research method

The following overview describes PAC's research method for market analysis and key differentiation features.

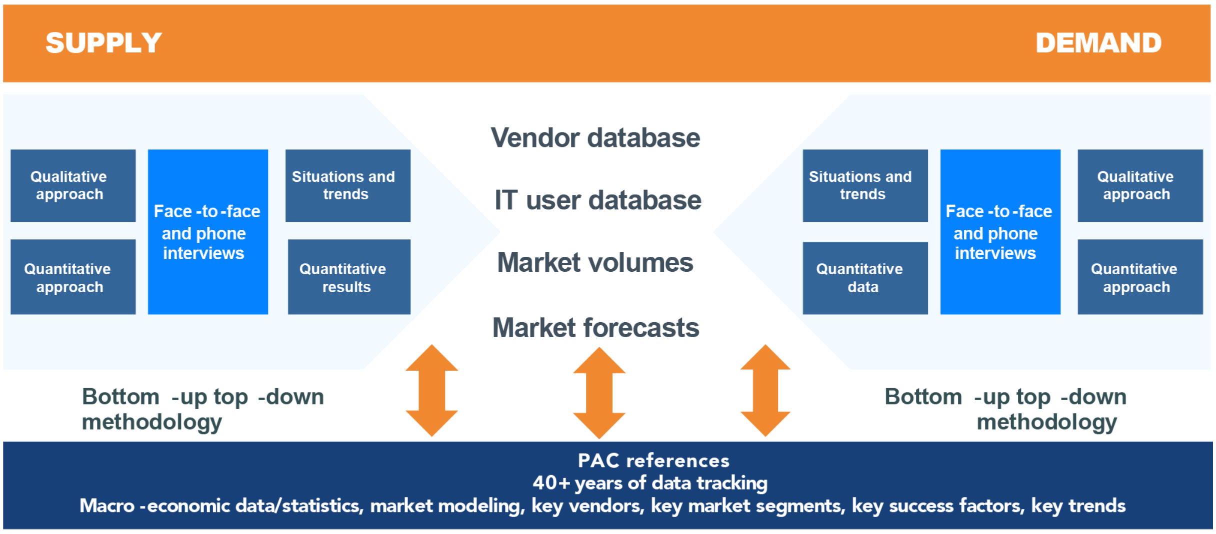

Fig. 3: Description of the PAC methodology

Local research and face-to-face communication are two core elements of PAC's methodology. In our market studies, we can draw on more than 40 years of experience in Europe.

Positioning within the PAC INNOVATION RADAR

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 INNOVATION RADAR. Here, the following applies: The closer a provider is to the upper right corner, the closer they are to meeting customers' requirements for that segment.

The classification of providers is based on the overall score:

"Best in Class"	1.0 – 1.9
"Leading Edge"	2.0 – 2.9
"Emerging Capability"	3.0 – 3.9
"Solid"	4.0 – 4.9

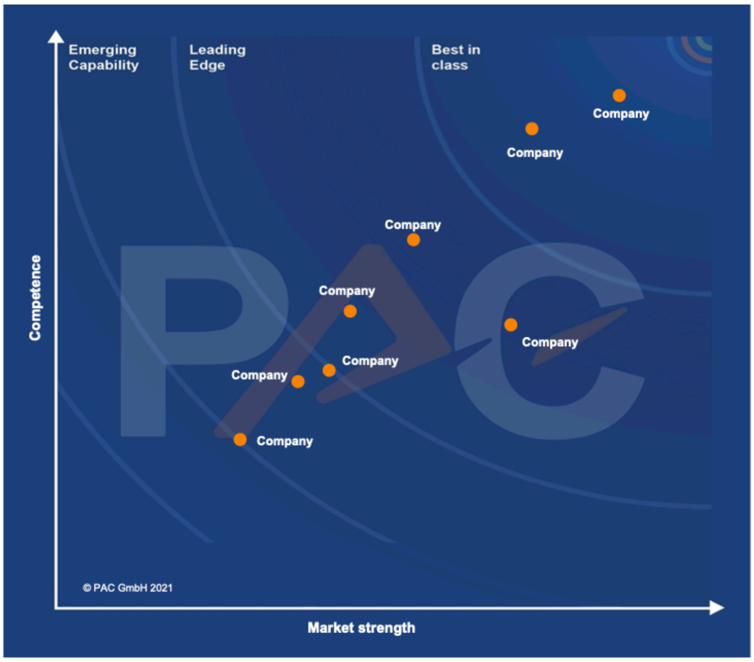

Fig. 4: Classification of providers in the PAC INNOVATION RADAR graph (example)

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PAC INNOVATION RADAR “Salesforce-related Services in Europe 2022 – The Communications & Media View”

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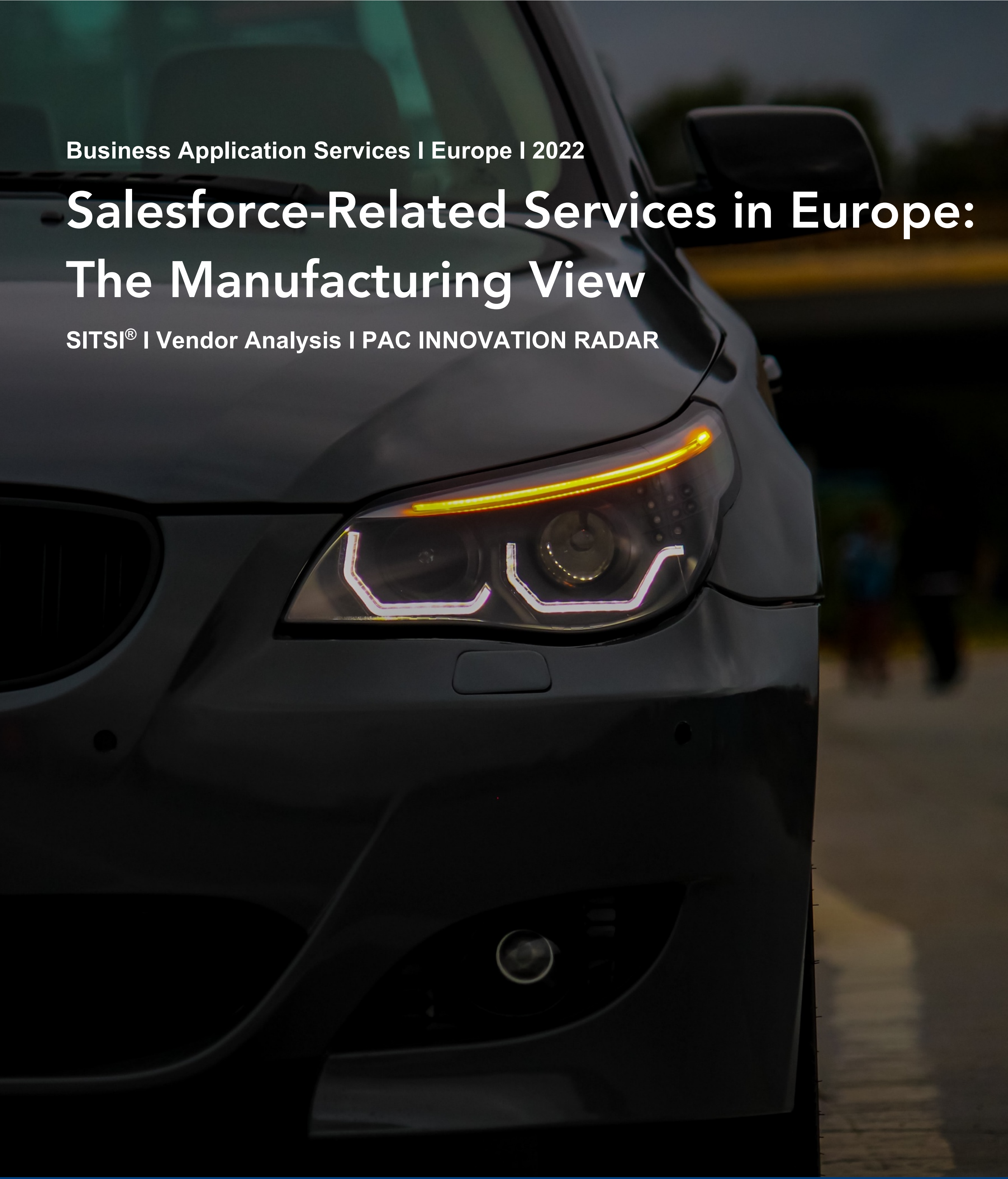
Business Application Services I Europe I 2022

Salesforce-Related Services in Europe: The Manufacturing View

SITSI® I Vendor Analysis I PAC INNOVATION RADAR



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PAC RADAR
IT SUPPLIER ASSESSMENT FROM PAC
Salesforce - Related Services for Manufacturing in Europe
BEST IN CLASS
REPLY
2022

INTRODUCTION

Salesforce-related Services in Europe: One of the most dynamic ecosystems of professional services suppliers in the region's digital services market.

Salesforce continues to be one of the fastest-growing enterprise software vendors in Europe. The company's revenue in the region rose by 34% to more than **€6bn** in the 12 months ending January 2022, making it the company's fastest-growing territory. The company recently confirmed it is on track to exceed growth of 20% for 2023, with Europe a key growth driver.

This has created a major opportunity for its partner ecosystem, which already incorporates more than **500** advisory, implementation and development partners in the region. PAC expects European businesses to spend more than **€6bn** on Salesforce-related consulting and systems integration this year.

Salesforce has cultivated a large and diverse ecosystem of partners supporting its clients in Europe, ranging from large global consulting and system integration firms to regional partners and specialist players.

A wave of consolidation has played out over the last five years as key Salesforce partners ramp up their teams of experts through acquisitions. But despite this, a healthy community of smaller, specialist players continue to thrive.

Customers have a lot of potential suppliers at their disposal, and this report aims to help them navigate the ecosystem to find the best partner for their requirements.

Salesforce relies on these partners to accelerate its customers' time-to-value and help them harness the vendor's growing importance at the heart of their business. The company has expanded its range of offerings with the acquisition of Slack, Tableau and MuleSoft, and the launch of new services such as the Net Zero Cloud.

But a key part of the role of Salesforce partners is to help join the dots between the platform and the specific needs of the client and the industry in which they operate. As businesses become more digital-centric, they need assistance in building platforms and services that support and enhance the critical moving parts of their organization.

Salesforce has doubled-down on its industry go-to-market approach and as we have found in this analysis, we see many of the vendor's partners following suit with the creation of industry-specific consulting and delivery teams, practices and assets.

Customers are placing new demands on their Salesforce services partners, and the ones that evolve to help them extend the platform into the heart of their business will be the ones that thrive.

SALESFORCE IN EUROPEAN MANUFACTURING

Europe's manufacturing organizations are going through a period of unprecedented change and disruption.

Huge pressures on global supply chains, the need to accelerate time-to-market while meeting constantly changing customer needs, and new demands in terms of sustainability are driving major transformation programmes across all areas of the sector.

In markets such as automotive manufacturing, companies are having to completely reinvent their product strategies and supporting supply chains and partner ecosystems as they pursue aggressive targets in vehicle electrification.

In the CPG space, brands are under more scrutiny than ever before to provide clear insight to customers and regulators on the working practices and emissions footprint of their products, from source through to sale.

As a result, many organizations in this sector are looking to put data at the heart of their day-to-day operations. However, decades of dependence on fragmented ERP application estates makes this a difficult task.

Salesforce has made good progress over the last decade in helping European manufacturers transform key aspects of their day-to-day operations such as sales and marketing management, field service optimization, and production systems and asset management.

It remains early days for Salesforce's manufacturing cloud proposition in Europe, and this is one area where it will work closely with its consulting and IT services partner ecosystem to build the necessary bridges to meet the client's specific requirements.

In this report, we map out those IT services organizations that combine the deep industry domain knowledge and expertise with experience in supporting Salesforce's expanding portfolio in the European manufacturing sector.

Selected Key Salesforce Accounts in the European Manufacturing Sector

KONE, adidas, ASTON MARTIN, OSRAM, ABB, Volkswagen, PHILIPS, RENAULT, ALSTOM, Pernod Ricard

PAC INNOVATION RADAR GRAPH

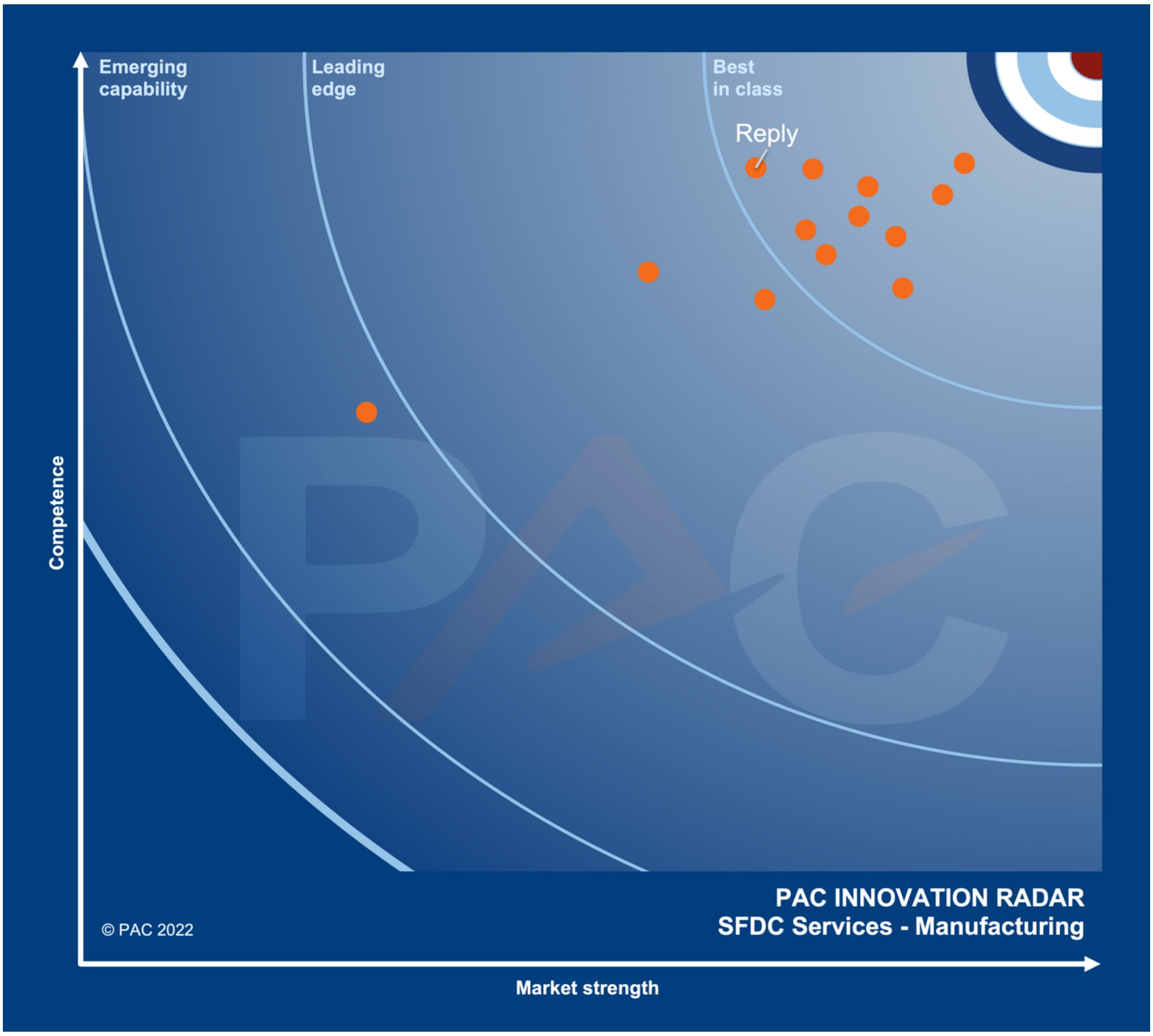

Fig. 1: PAC INNOVATION RADAR graph

Reply

PAC INNOVATION RADAR – Salesforce Services in Europe 2022

The Manufacturing View

Key Strengths (Industry Specific)

- **Domain Focus**: Reply has strong credentials in this area as a Salesforce partner, having achieved the highest level of "Expert," and being named as one of just eight global partners with the "Expert" level specifically in automotive. The company was also recently named as a Launch Partner for the Salesforce Automotive Cloud in the EMEA region.
- **Multi-Cloud Experience**: A lot of the vendor's projects see it supporting its multi-cloud solutions, and many are focused on the area of distribution, and specifically the quote-to-order process.
- **Strong References**: One reference customer is Germany-based international seed manufacturer KWS, for whom it implemented a uniform global CRM system based on Salesforce that Arlanis Reply developed and rolled out for subsidiaries across 30 countries. The vendor provides business and technical advice and support to help them understand how they can optimize their current processes.

Key Strengths (General)

- **Scale:** Reply is one of the fastest growing IT services providers in the world, increasing its revenue by close to 67% over the last five years to €1.48bn. The company's Salesforce practice is expanding at a strong rate.
- **Collaboration with Salesforce**: Reply works closely with Salesforce in its target industries and territories, from sales and pre-sales, through to consulting, implementation, integration and customer success and services. The company is a permanent member of the Cloud Elite/Trailblazer Pre-Sales Program.
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- **Assets & Frameworks:** Reply has developed a number of frameworks, tools and best practices to accelerate their clients' time-to-value with their Salesforce investments.

These include the Facility Cloud, a Salesforce framework with integrated CAD functionality.

Growth Opportunities
• **Regional Expansion**: Reply has significant potential to grow its brand in the manufacturing segment, particularly outside its core European territories.

OBJECTIVE OF THE PAC RADAR

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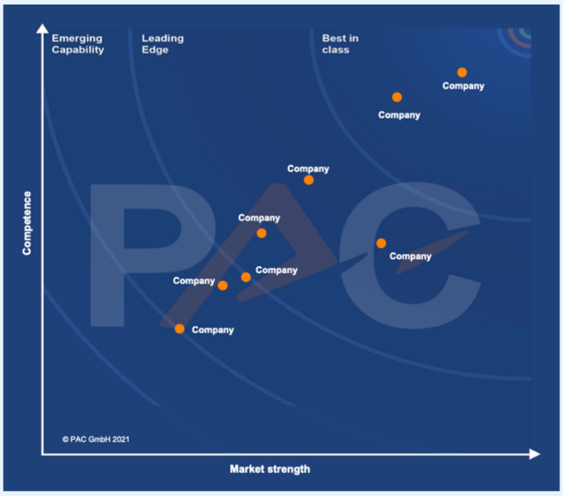

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The Concept

Evaluation of criteria at cluster and subcluster levels					
Main Cluster	Competence			Market strength	
Cluster	Strategy	Portfolio	Go-to-market	Market position	Market growth

Fig. 3: 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 report-card score within the peer group of the positioned providers.

This is based on:

- Dedicated face-to-face interviews with the providers about resources, distribution, delivery, portfolio, contract drafting, pricing, customer structure, client references, investments, partnerships, certifications, etc.;
- The analysis of existing PAC databases;
- Secondary research;
- If applicable, a poll among customers by PAC.

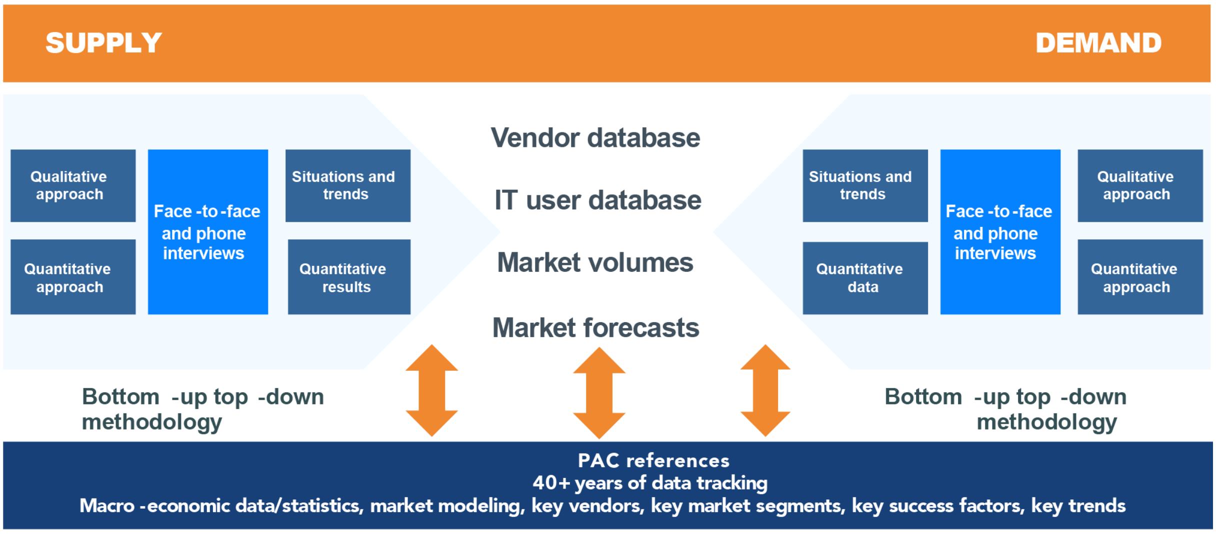
The provider data is verified by PAC and any omissions are rectified based on estimates.

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.

General PAC research method

The following overview describes PAC's research method for market analysis and key differentiation features.



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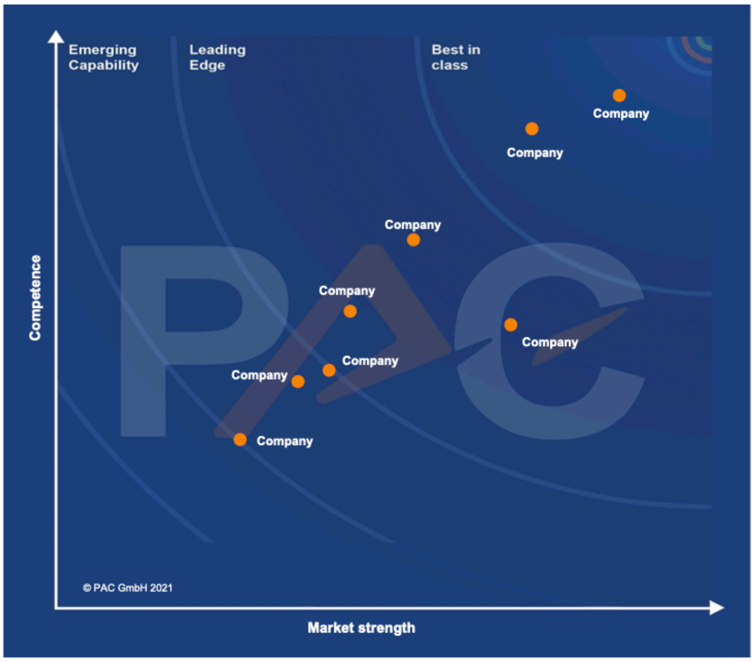

Fig. 5: Classification of providers in the PAC INNOVATION RADAR graph (example)

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