

Benelux Digital Services 2025 RadarView™ Excerpt

Transforming Benelux's digital
landscape leveraging emerging
technologies

April 2025

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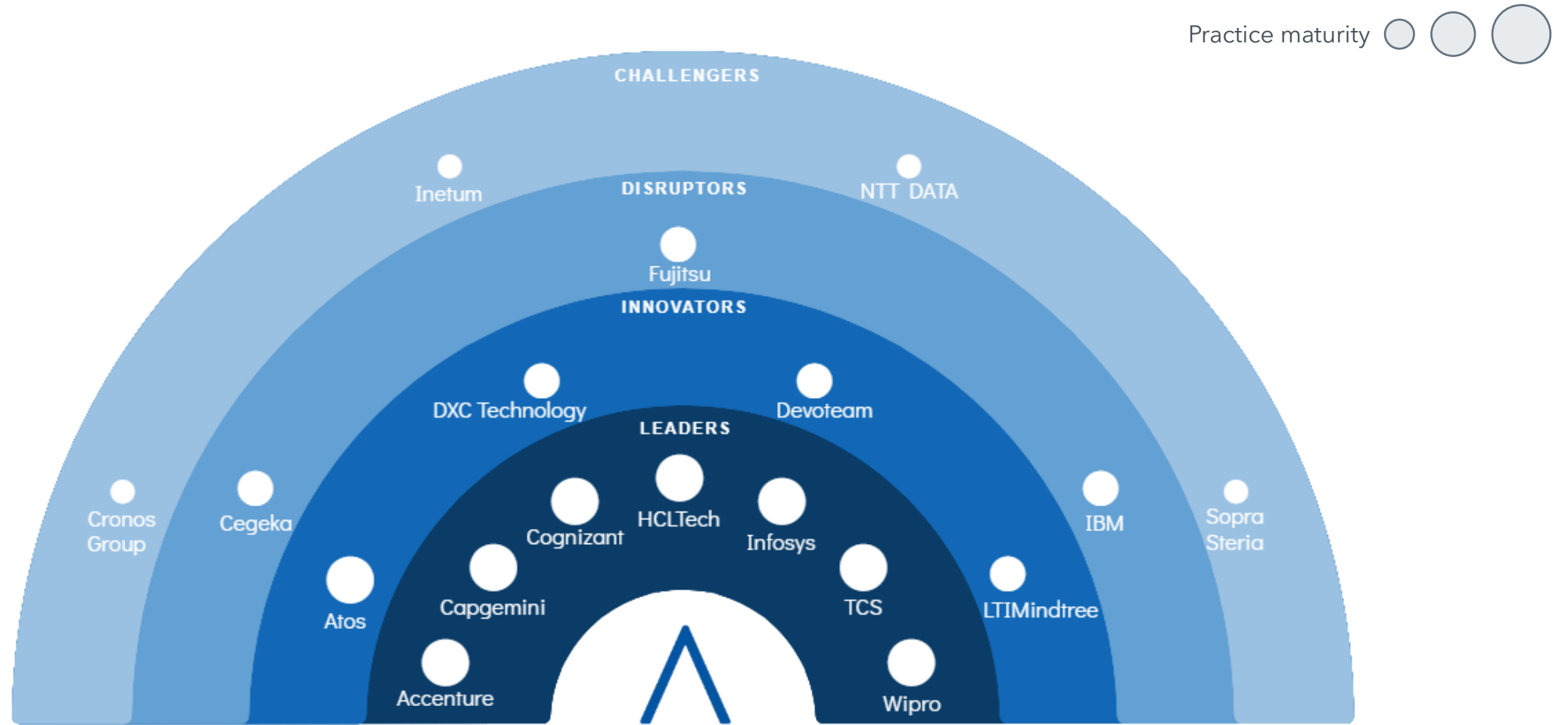
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Avasant recognizes 18 top-tier service providers supporting the Benelux region in digital transformation



Service providers are leveraging digital technologies to accelerate digital transformation for Benelux enterprises (1/2)

Service providers in the Benelux region are harnessing digital technologies to boost operational efficiency, strengthen resilience, ensure compliance with regulations, and support sustainability goals. They are also expanding their offerings and use cases through strategic partnerships and targeted investments. The capability analysis of 18 service providers shows the following trends and insights.

Enterprise focus

Addressing talent shortage and driving regional innovation

Driving operational efficiency amid cost pressures and market uncertainty

Service provider initiatives

- **About 44%** of service providers are collaborating with regional universities to foster digital talent development and create new digital solutions in areas such as AI and quantum computing.
- **Half** of the service providers are investing and collaborating with Benelux-based digital startups to develop new use cases, including AI-powered drug development and identity access management solutions.
- **Nealy 90%** of the service providers have collaborated with regional companies and consortiums to develop innovative solutions that address local needs. These solutions include remote asset monitoring to reduce energy wastage, enhance the billing experience for telecom clients, and automate fare calculations for travelers.

- **All** the service providers assist Benelux enterprises in streamlining their operations by offering AI-enabled services. These services include automated pricing adjustments, optimized data management, real-time monitoring and analysis of resource usage, automated identification systems, efficient data migration, and enhancements to the application development cycle.
- **Over 60%** of the service providers are leveraging IoT and digital twin technologies to streamline operations for clients in the Benelux region. These technologies offer centralized data control, remote monitoring, automated workflows, and improved operational visibility through connected products.

Illustrative examples*

Sample providers



Sample providers



*The logos in this column are examples of service providers offering the initiatives. This is not an exhaustive list.

Sources: Avasant Research; percentages are based on capability discussions

Service providers are leveraging digital technologies to accelerate digital transformation for Benelux enterprises (2/2)

Service providers in the Benelux region are harnessing digital technologies to boost operational efficiency, strengthen resilience, ensure compliance with regulations, and support sustainability goals. They are also expanding their offerings and use cases through strategic partnerships and targeted investments. The capability analysis of 18 service providers shows the following trends and insights.

Enterprise focus

Elevating customer satisfaction and experience

Strengthening cybersecurity resilience and complying with regulations

Maintaining sustainability push to drive company goals and regulatory compliance

Service provider initiatives

- **Over 40%** of service providers are providing digital services to the public sector to enhance citizen experience in the Benelux region. These services include AI-enabled chatbots for addressing customer inquiries, digital banking services, new citizen integration, tax calculation and payment, and secure digital transactions.
- **Over three-fourths** of the service providers have helped Benelux enterprises build platforms and offerings that provide personalized experiences to the end users by leveraging technologies such as generative AI and analytics.

- **Over 80%** of service providers have recently established a presence in the Benelux region through acquisitions, local offices, and delivery centers. This strategy addresses regulatory concerns and ensures regional sovereignty.
- **About 61%** of the service providers have made dedicated investments and formed partnerships to enhance their cybersecurity offerings for Benelux clients, helping them strengthen their cybersecurity posture and comply with regulatory requirements.

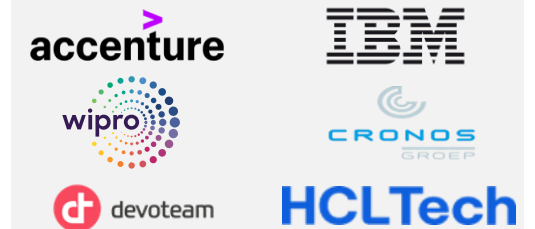
- **Two-thirds** of the service providers offer AI-enabled sustainability services to Benelux firms to help them achieve their sustainability objectives. These services include ESG data collection, reporting and compliance, and green application development.
- **About 56%** of the service providers have formed partnerships focused on sustainability or joined consortiums to provide sustainable solutions for Benelux clients, offering decentralized energy systems, reducing carbon emissions, and ensuring transparent reporting.

Illustrative examples*

Sample providers



Sample providers



Sample providers



*The logos in this column are examples of service providers offering the initiatives. This is not an exhaustive list.

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