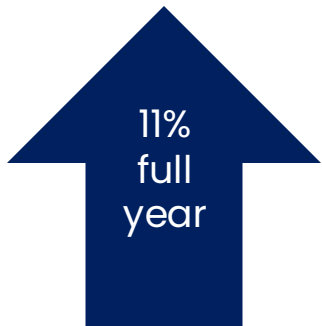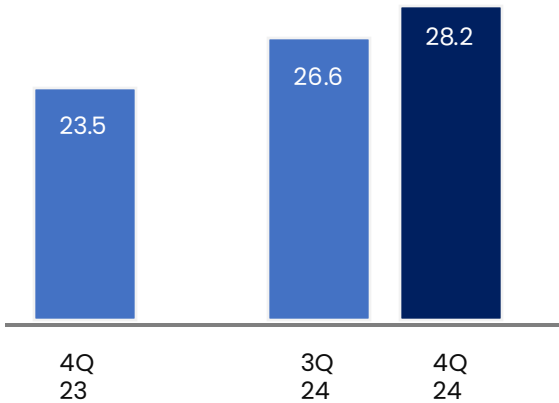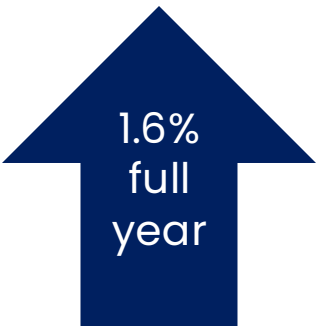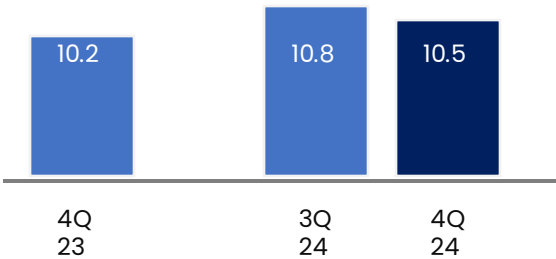S²
SQUARE
SOURCING SUCCESS

Geert Hendrickx

Helping Clients and Service Providers to get to Success. Together!

Everything As a Service
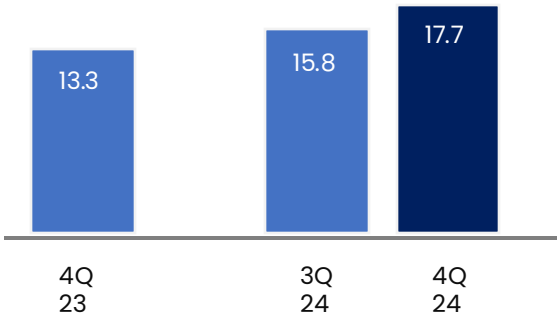
IT global spend – YoY growth

Combined market — Bars: 4Q 23 = 23.5, 3Q 24 = 26.6, 4Q 24 = 28.2. Arrow: 11% full year

Managed services — Bars: 4Q 23 = 10.2, 3Q 24 = 10.8, 4Q 24 = 10.5. Arrow: 1.6% full year

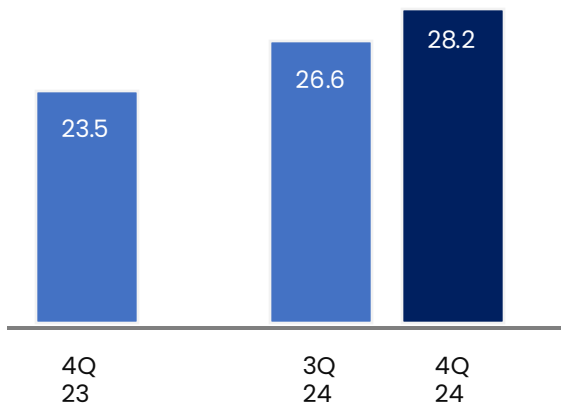**As a services** — Bars: 4Q 23 = 13.3, 3Q 24 = 15.8, 4Q 24 = 17.7. Arrow: 19% full year

Source: ISG, 2025

S² SQUARE

Everything As a Service

IT global spend – YoY growth

Combined market

- 4Q 23: 23.5
- 3Q 24: 26.6
- 4Q 24: 28.2

11% full year

Managed services

- 4Q 23: 10.2
- 3Q 24: 10.8
- 4Q 24: 10.5

1.6% full year

As a services

19% full year

Source: ISG, 2025

S² SQUARE
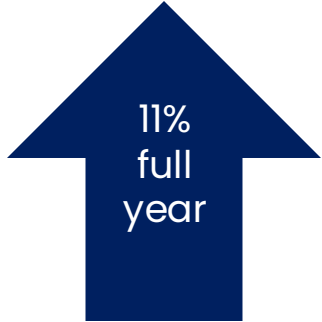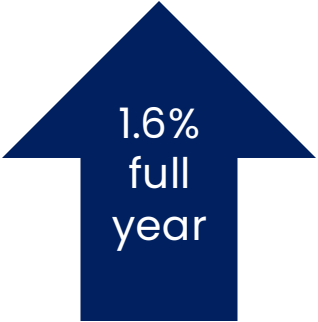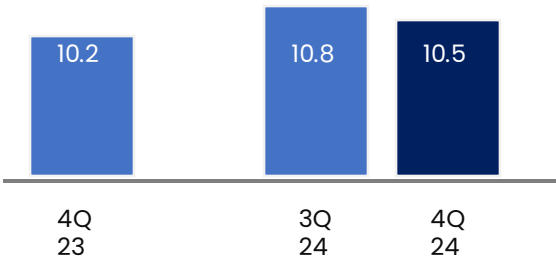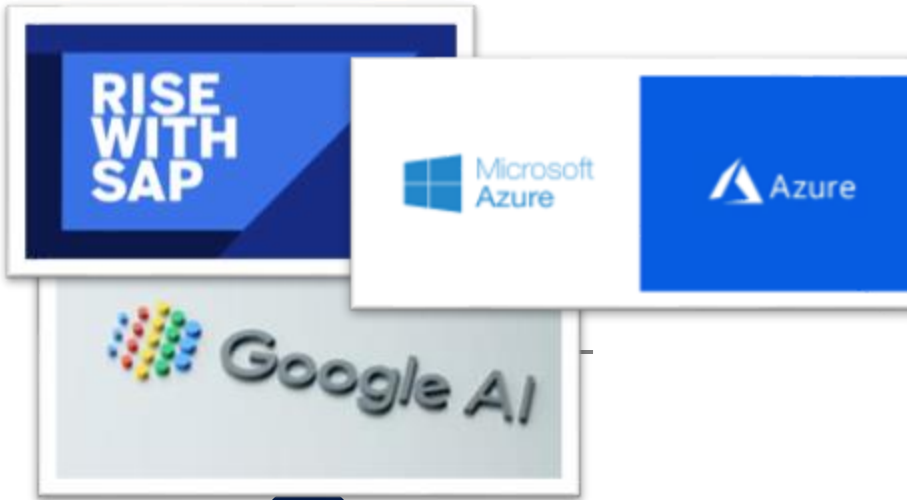
Services in the Insurance industry

Initiation

Policy case review

Payout calculation

Claim approval

Payment Processing

John's insurance application received

Initial evaluation

Criteria check

⚠ Application flagged

Claims history not meeting the criteria.

Underwriter reviewing John's claims history

Claim approved

Approval notification sent to John

S²SQUARE
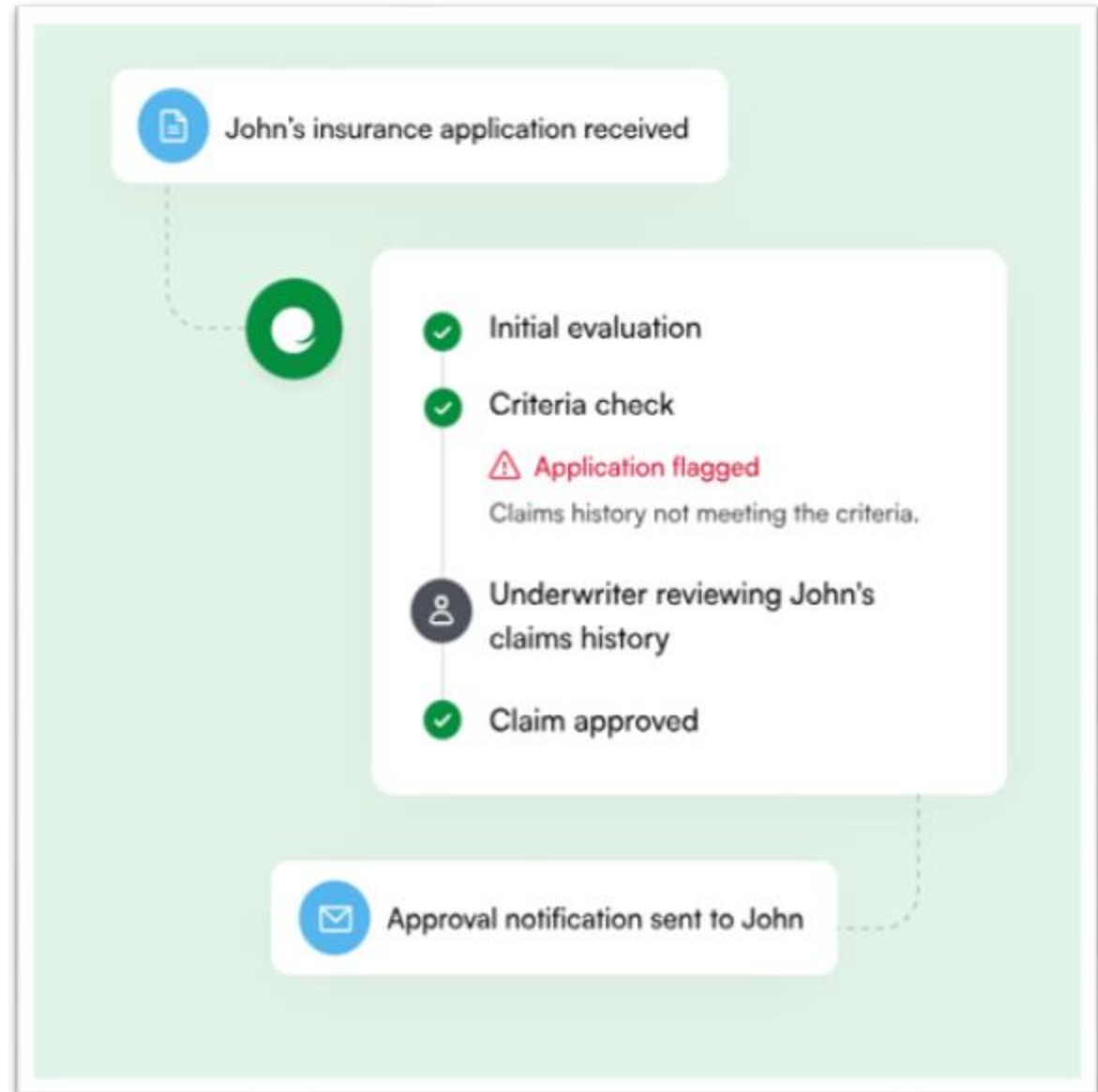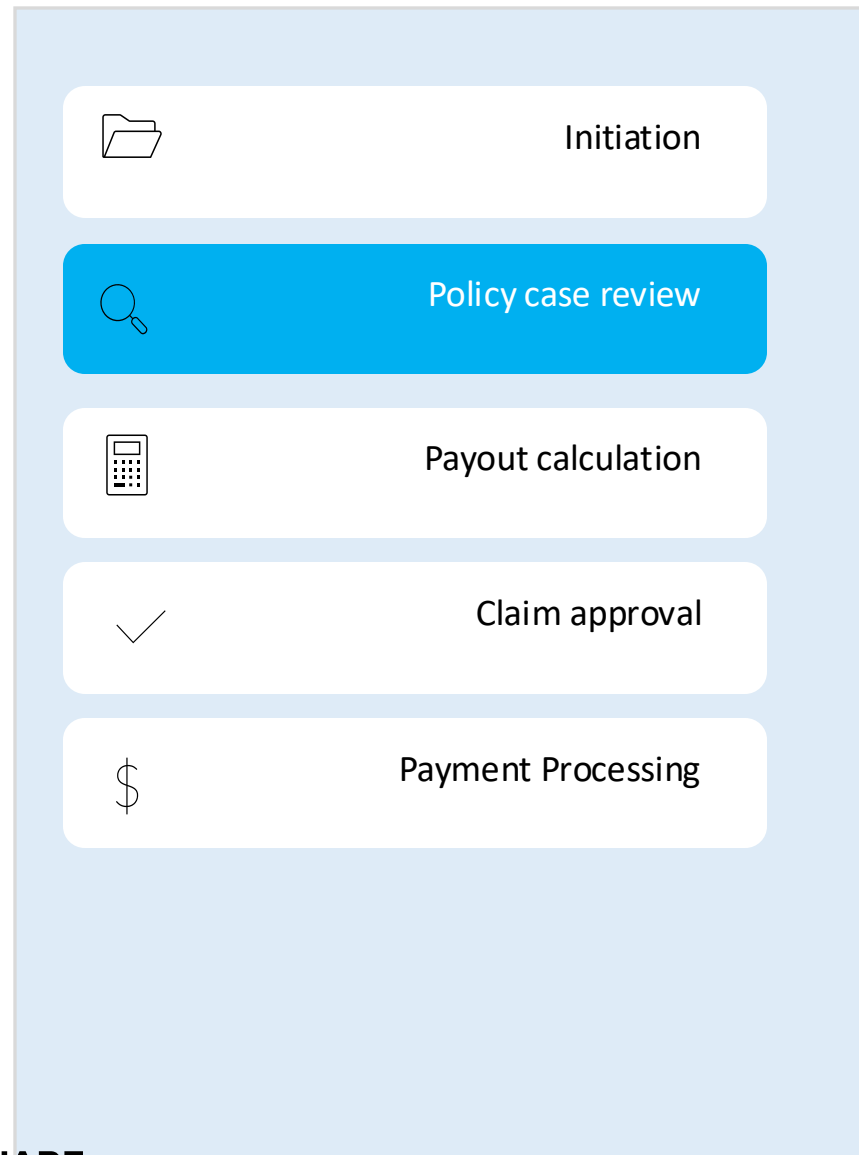
Services in the B2C world

Trained on industry specific data

High IQ and human like empathy

Access to data (open invoice,...)

Voice AI Agent

00:15 sec

24x7 multi-lingual support

Customer emotion detection

Indistinguishable from human voice

S² SQUARE

5
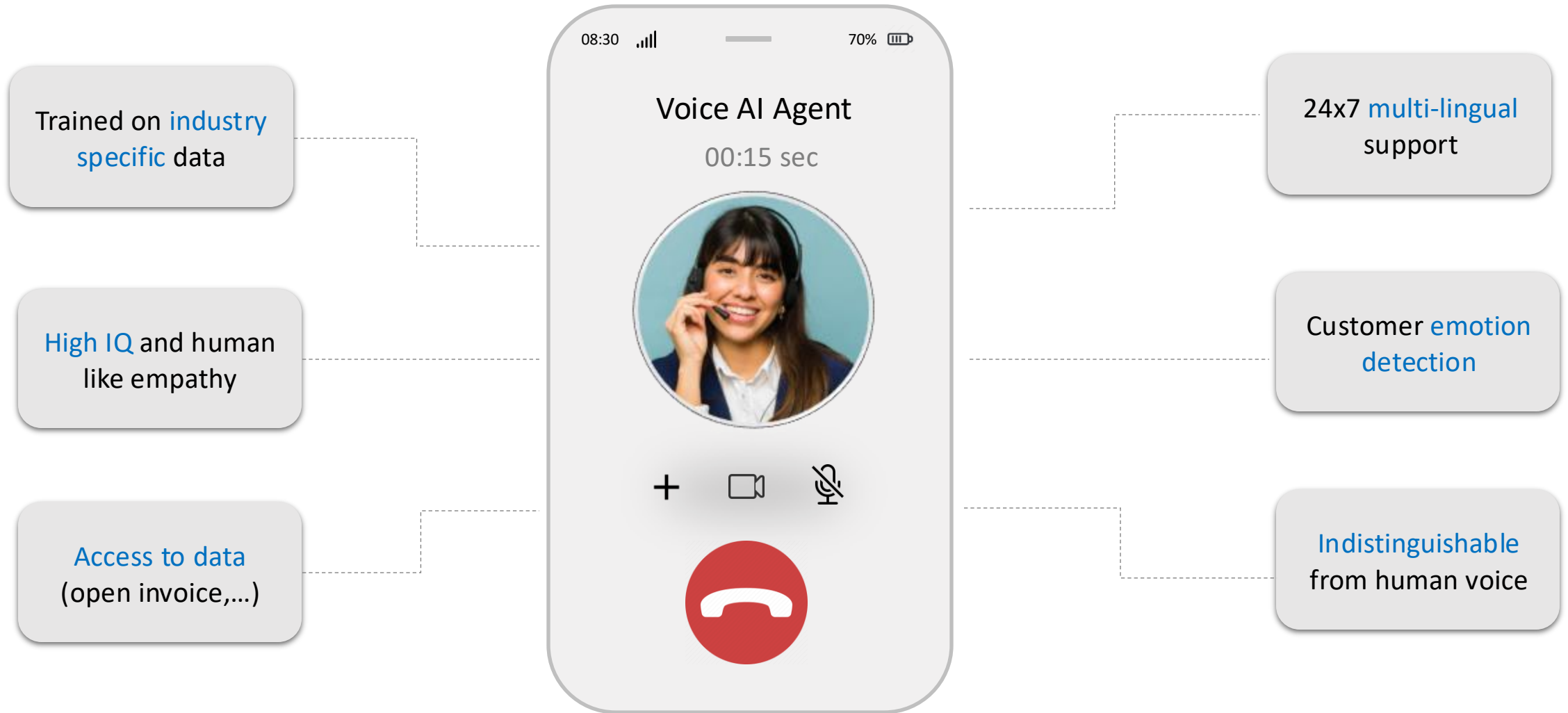
Discover the revolutionary shift where services are no longer supported by software – **they *are* software**

S²SQUARE

The new paradigm ... Service as Software (SaS)
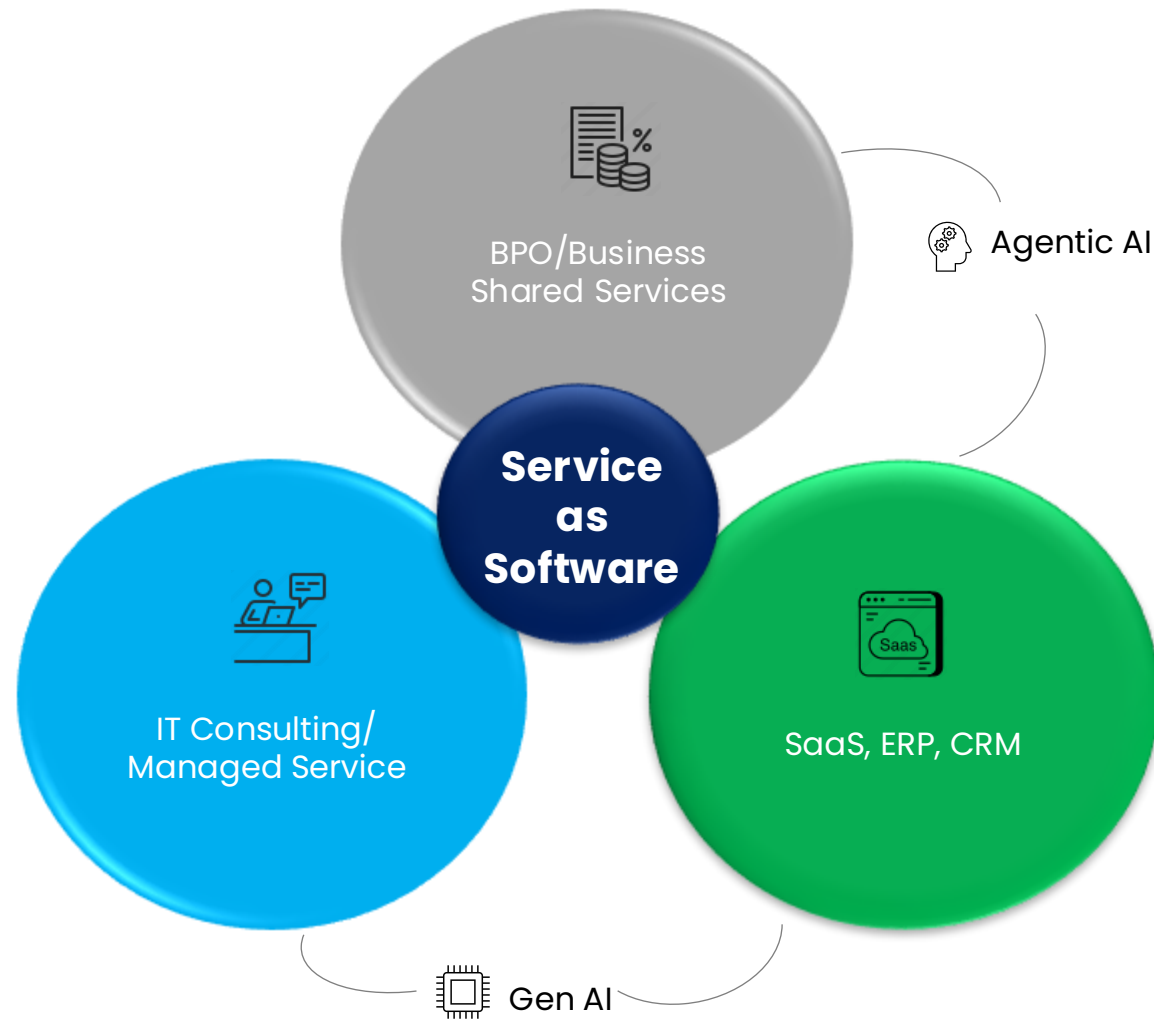
Partnering for **outcome** in the IT-heavy sectors

Financial Services, TelCo, Utilities

Product Oriented Teams

Business

Internal IS

Main IT Service Providers

- IT is core IP - Strong control

- IT talent pool of 1000's – internals + externals

- Today : agile operating model, strategic partners

"3 main partners"

Co-sourced squads

Strategic Partnership

Body-shopping

Managed Staffing

Clear responsibilities

Co-leadership

Captive centers (BOT)

Selective managed service

Joint objectives

Quality people

High productive squads
Result

Business objectives
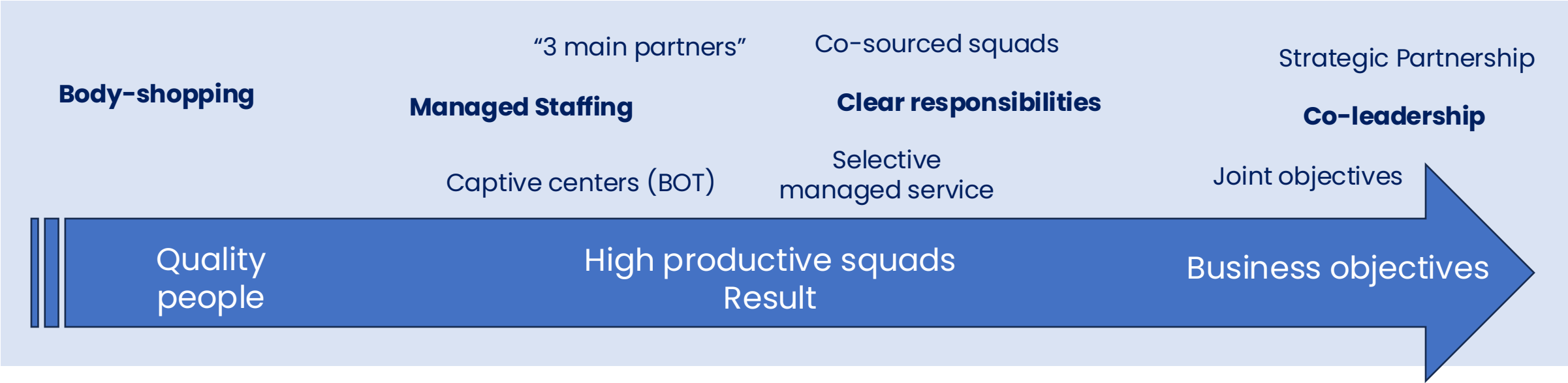
AI productivity on **IT service delivery**

>40% savings over 5 yr contract.

As per S-Square survey 2025

Impact of AI on productivity

Category	with AI	without AI
Application Development	44%	27%
Application Maintenance	43%	26%
Service Desk	42%	21%
Digital Workplace	41%	21%
Cloud & Infra	41%	24%
Testing	39%	23%
Cybersecurity	36%	18%

■ with AI   ■ without AI
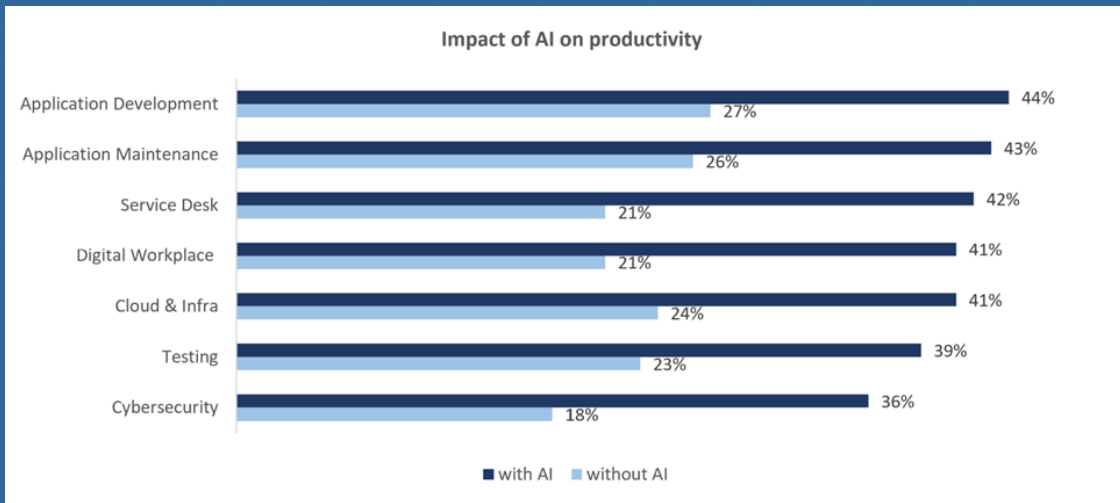
Enhanced User Experience with IT

AI is dictating a radical shift in the IT services industry

The past decade

The coming decade

The winners of today might not be the winners of tomorrow

Partnership Benchmark

Applications & Digital Square | 2025

MARKET IMPACT & CAPABILITY

LEADERS

Accenture, 3.76
Capgemini, 3.81
TCS, 3.48

CONTENDERS

Cognizant, 3.85
Sopra Steria, 3.74
Infosys, 3.85
Delaware, 3.72
Cegeka, 3.81
Cronos, 3.81
Deloitte, 3.26
DXC, 3.53
Atos, 3.49
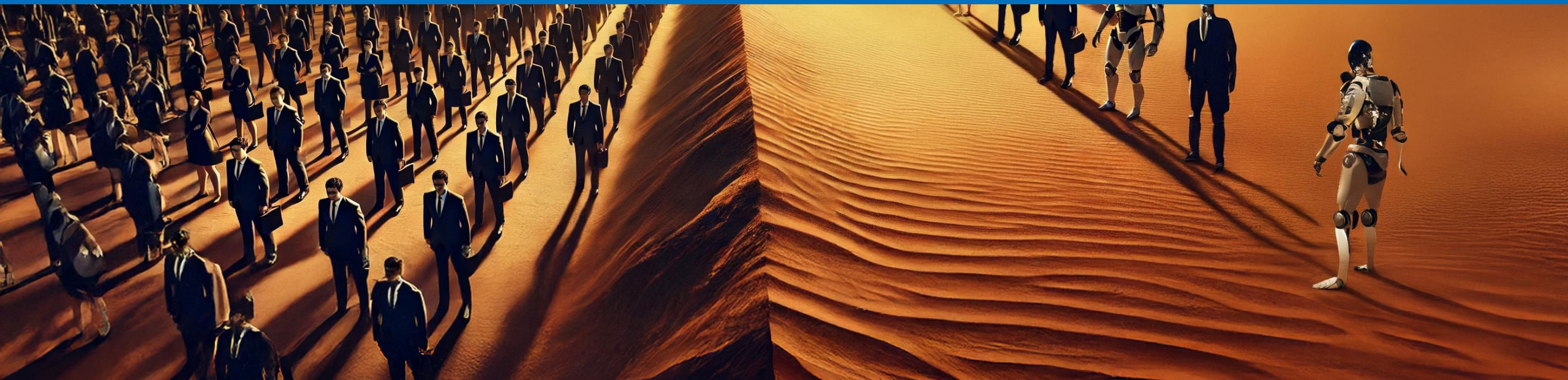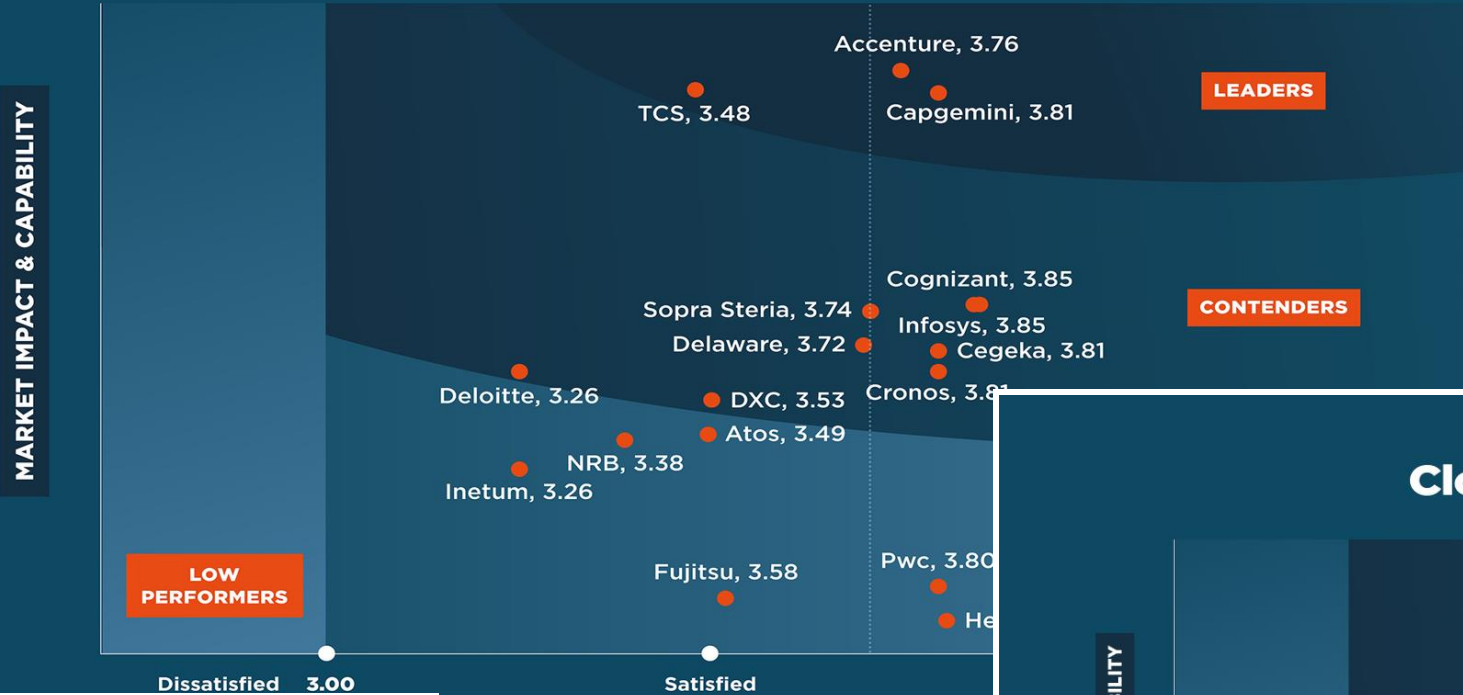NRB, 3.38
Inetum, 3.26

LOW PERFORMERS

Fujitsu, 3.58
Pwc, 3.80
He...

Dissatisfied 3.00
Satisfied

CLIENT SATISFACTION

End User Services Square | 2025

MARKET IMPACT & CAPABILITY

Cegeka, 3.57
LEADERS
Fujitsu, 3.29
Atos, 3.54
Stefanini, 4.35
Econocom, 3.70
TCS, 3.89
CONTENDERS
Capgemini, 3.07
NRB, 3.80
CHALLENGERS
Delaware, 4.13
LOW PERFORMERS

Dissatisfied 3.00
Satisfied
4.00
Very satisfied

CLIENT SATISFACTION

Cloud & Datacenter | 2025

MARKET IMPACT & CAPABILITY

Kyndryl, 3.86
LEADERS

Accenture, 3.29
Cegeka, 3.63
Atos, 3.39
STRONG CONTENDERS
HCL Tech, 3.43
TCS, 3.83
NTT Data, 3.04
NRB, 3.83
DXC, 3.15
Capgemini, 3.25
Fujitsu, 3.82
Cronos, 3.27
LOW PERFORMERS
Delaware, 3.80
CHALLENGERS

Dissatisfied 3.0
Satisfied
4.0
Very satisfied

Cybersecurity | 2025

MARKET IMPACT & CAPABILITY

Accenture, 3.66
Atos, 3.68
LEADERS
OCD, 3.63
Capgemini, 3.80
STRONG CONTENDERS
Nviso, 4.18
Cronos, 3.89
NTT Data, 3.45
Cegeka, 3.86
CHALLENGERS
LOW PERFORMERS

Dissatisfied 3.0
Satisfied
4.0
Very satisfied

CLIENT SATISFACTION