Digital Transformation Services for Insurance Companies – DACH 2026

SITSI® I Vendor Analysis I PAC INNOVATION RADAR

Insurance DACH
Customer Engagement
Risk & Claims
Life & Pension
Property & Casualty
Health Insurance
Reinsurance

– Consolidated –

Positioning of TCS

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June 2026

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INTRODUCTION

Caught between resilience and innovation

The insurance business has some unique attributes, as it is largely virtual in nature and lacking tangible products, which puts technology right at the heart of the business. On the one hand, insurers have to ensure the security and stability of their existing systems, and, on the other hand, they have to be open towards technological innovations in order to avoid falling behind. Therefore, finding the right balance between resilience and innovation is key.

In many cases, rigid, monolithic architectures represent a significant barrier for insurers seeking to keep pace with innovation. The vast majority have recognized the need to modernize their core processes and are investing substantially in this area.

Driven primarily by goals of cost reduction and increased efficiency, established insurers in the DACH region have launched numerous initiatives to advance the modernization of their core applications and processes. Many are turning to standardized, industry-specific solutions from software providers such as adesso, msg, Guidewire, or Faktor Zehn, which enable greater speed and flexibility while offering the potential to leverage built-in innovative capabilities—such as AI features—in the future.

However, competitive advantages arise not only from cost considerations, but also from differentiated customer service. This has led to various digital initiatives, including optimizations of multi-channel/ omni-channel customer experience, and more personalized policy recommendations, etc.

Overall, the insurance industry stands at a critical juncture: Confronted by shifting customer expectations, tightening regulatory frameworks, and competition from digital-native entrants, insurers are under increasing pressure to accelerate their transformation.

Rating / Batch*	Score Range	Segment Characteristics
	1.00 – 1.99	**"Best in Class"** providers deliver a highly specialized, insurance-focused value proposition supported by mature Intellectual Property (IP) and strong relevance to the DACH insurance market. They demonstrate a deep understanding of local and multinational insurers' needs, reinforced by robust partnerships and operational capabilities tailored to DACH requirements. Client references highlight innovative, thought-leading projects with high-quality examples across the insurance value chain. Segment coverage spans all major insurance lines (L&P, P&C, Health, and Reinsurance).
	2.00 – 2.99	**"Excellent"** providers offer advanced and well-developed insurance capabilities with moderate differentiation, including selected innovative IP assets. They maintain solid partnerships and regional adaptation for the DACH market, with delivery models capable of supporting multinational subsidiaries when required. Client references indicate good quality but are less distinctive across insurance functions. Segment coverage across L&P, P&C, Health, and Reinsurance is moderate, not as broad or deep as that of Best-in-Class peers.
	3.00 – 3.99	**"Strong"** providers deliver reliable and competent IT services but have limited insurance specialization, often focusing on mature or lower-value areas. Partnerships and DACH market alignment are limited. Client references are sparse across digital engagement, product development, policy, claims, and IT processes. Insurance segment coverage (L&P, P&C, Health, and Reinsurance) remains narrow and less comprehensive than that of higher-tier providers.

**Please note: ICT decision-makers can weight all evaluated criteria according to their specific preferences and requirements. This individual weighting may result in a changed outcome, where providers currently positioned as "Excellent" or "Strong" could achieve a Best-in-Class positioning.*

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026"

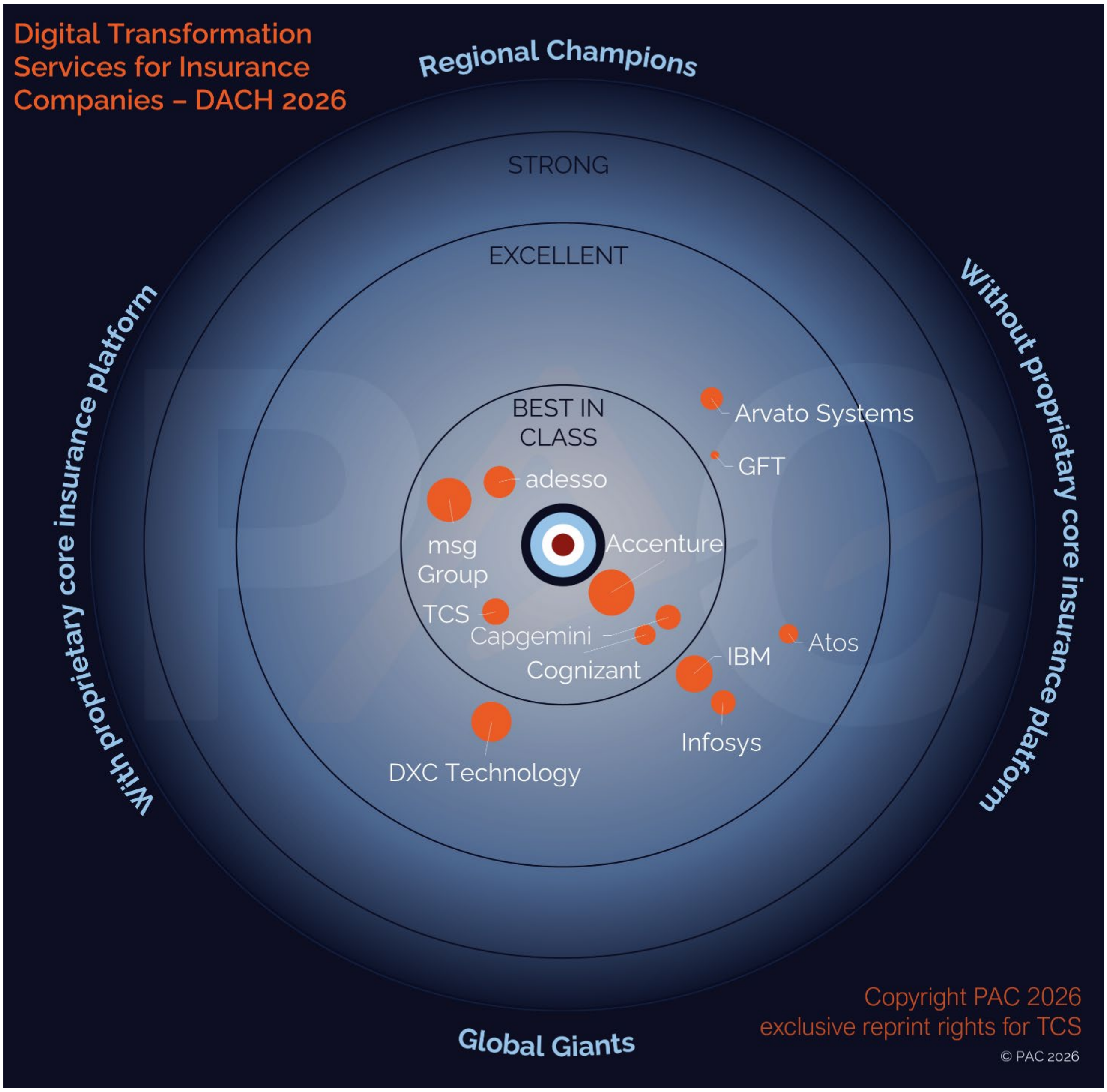

Fig. 1: PAC RADAR "Digital Transformation Services for Insurance Companies – DACH 2026"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the center, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.81	1.74
Competence	1.94	1.27
Total Score	**1.90**	**1.41**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – CUSTOMER ENGAGEMENT"

Fig. 2: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Customer Engagement"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Customer Engagement		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.81	1.74
Competence	1.98	1.60
Total Score	**1.94**	**1.63**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – RISK & CLAIMS"

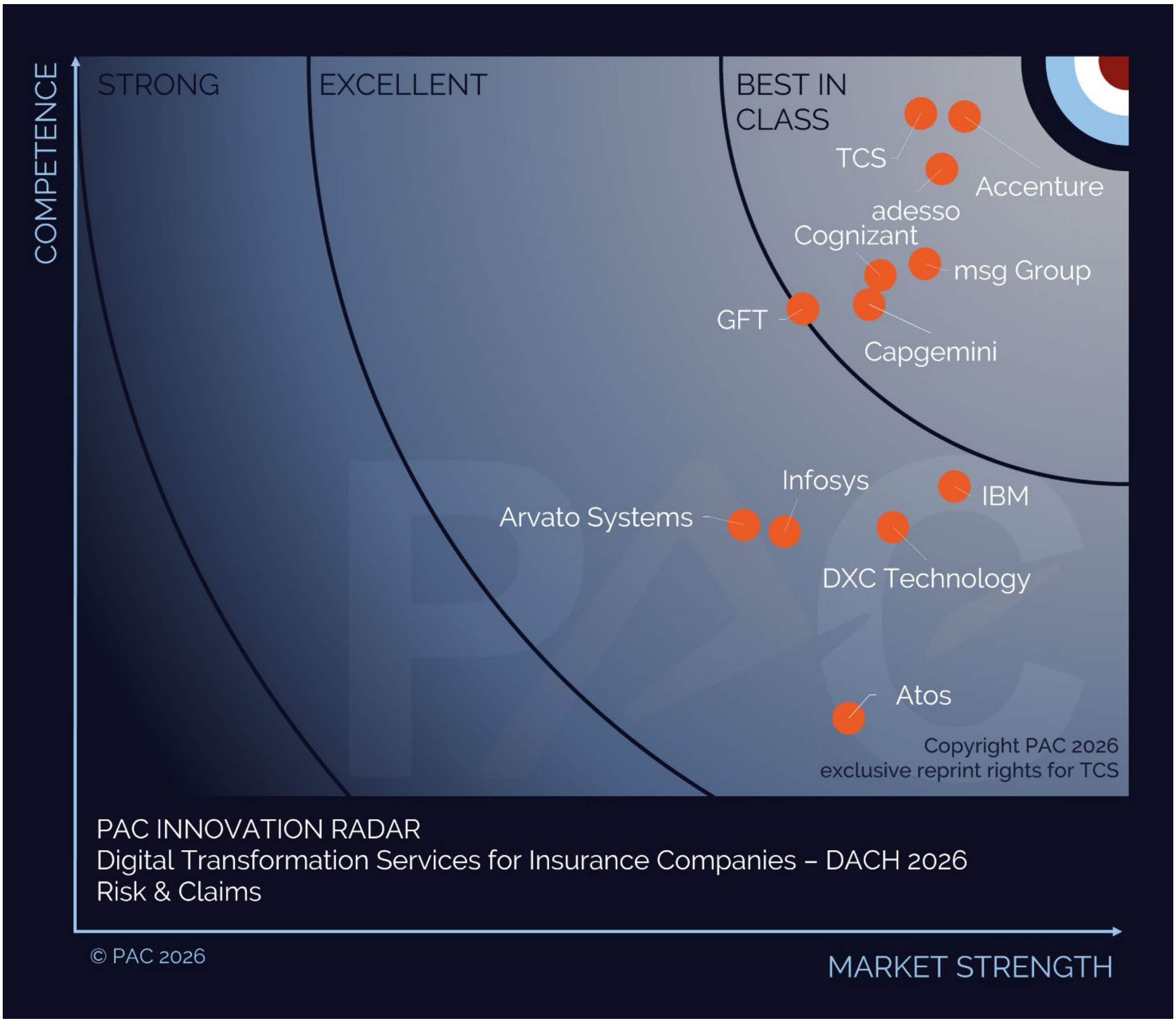

Fig. 3: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Risk & Claims"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Risk & Claims		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.81	1.74
Competence	1.95	1.18
Total Score	**1.91**	**1.34**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • References: Policy Management • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – LIFE & PENSION"

Fig. 4: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Life & Pension"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Life & Pension		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.82	1.38
Competence	1.93	1.23
Total Score	**1.89**	**1.29**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • References: Policy Management • Segment Representation: Life & Pension • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – PROPERTY & CASUALTY"

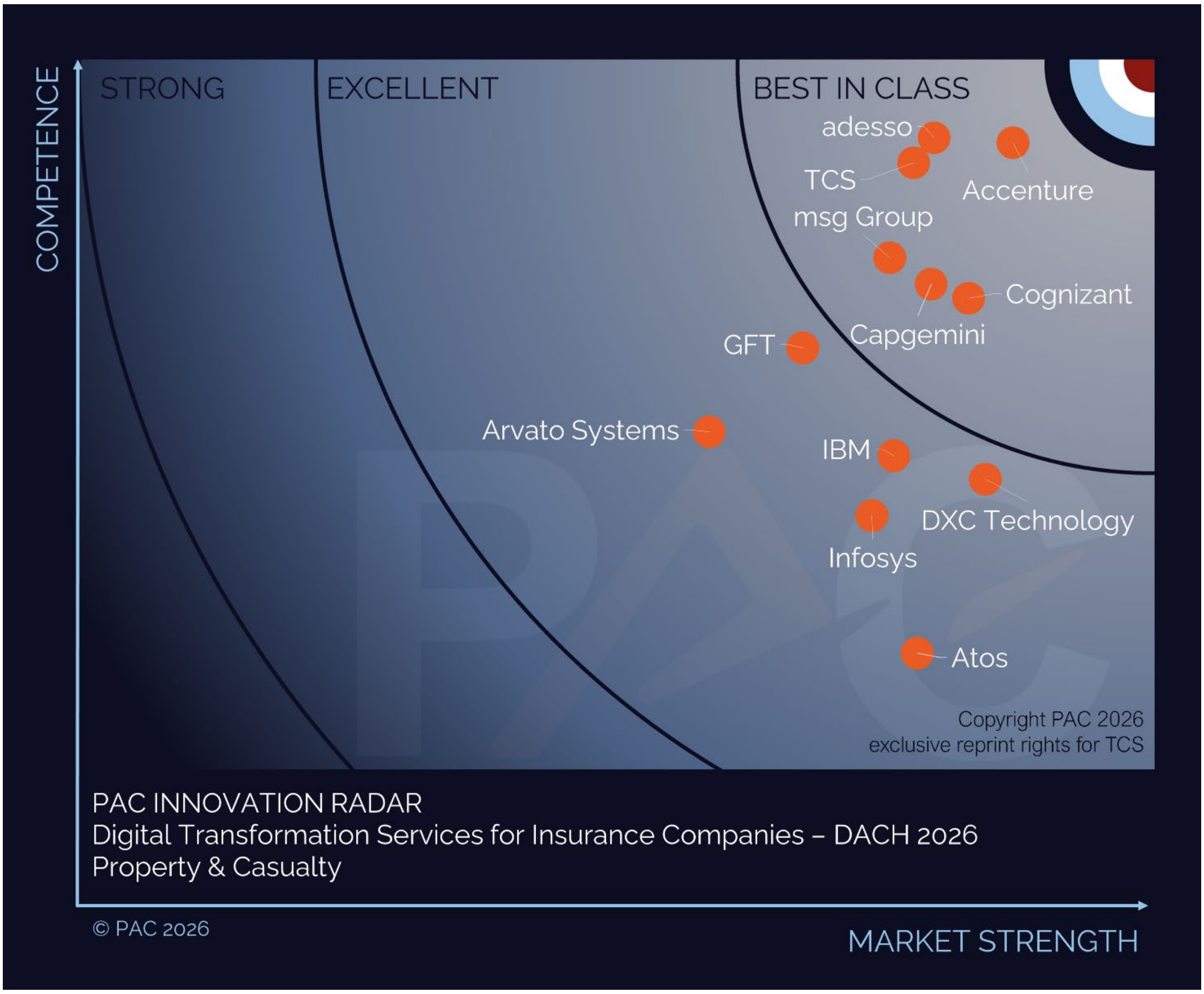

Fig. 5: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Property & Casualty"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Property & Casualty		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.79	1.71
Competence	1.94	1.30
Total Score	**1.88**	**1.45**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • References: Policy Management • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – HEALTH INSURANCE"

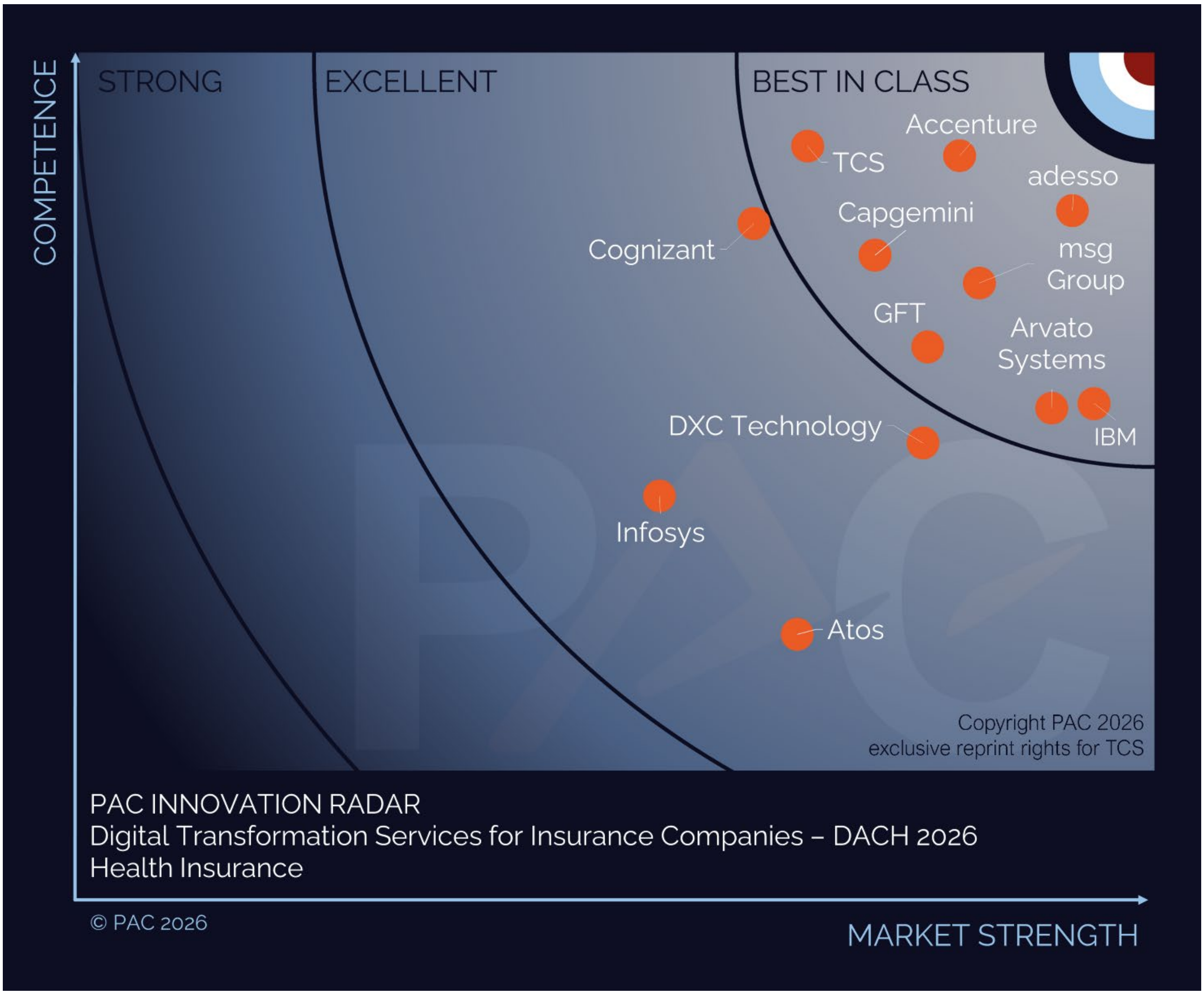

Fig. 6: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Health Insurance

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Health Insurance		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.86	2.52
Competence	1.93	1.27
Total Score	**1.90**	**1.84**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• References: Product Development & Underwriting • References: Policy Management • General Data & Artificial Intelligence (AI) Capability	• n/a

PAC INNOVATION RADAR "DIGITAL TRANSFORMATION SERVICES FOR INSURANCE COMPANIES – DACH 2026 – REINSURANCE"

Fig. 7: PAC INNOVATION RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Reinsurance"

The evaluation criteria are weighted and assigned to the clusters "competence" and "market strength". Based on all scores and weightings, the overall score is calculated. From the resulting overall score, each provider receives their characteristic positioning within the PAC RADAR.

Here, the following applies: The closer a company is to the upper right corner, the closer they are to meeting customers' requirements.

RADAR

REVIEW OF TOP-SEEDED PROVIDER TCS

Digital Transformation Services for Insurance Companies – DACH 2026 – Reinsurance		Positioning: Best in Class
Cluster	**Average**	**TCS**
Market Strength	1.93	1.72
Competence	1.89	1.18
Total Score	**1.91**	**1.46**

Criteria rated significantly ABOVE AVERAGE (more than 0.75)	Criteria rated significantly BELOW AVERAGE (more than 0.75)
• General Data & Artificial Intelligence (AI) Capability	• n/a

OBJECTIVE OF THE PAC RADAR

What is 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 their performance and competencies within specific market segments.

Each PAC RADAR focuses on a specific IT market segment. Up to 30 leading providers are evaluated per segment. Participation in the PAC RADAR is free of charge. All providers are evaluated using PAC's proven methodology, which is based on personal face-to-face interviews and a detailed self-disclosure from each provider.

PAC reserves to also evaluate and position relevant providers in the PAC 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 RADAR. The criteria are classified by clusters and can all be attributed to the "Competence" and "Market Strength" clusters. The provider evaluation, including a market description, is published as a report.

PAC RADAR graph

The PAC RADAR graph is a visual presentation of the results of the provider evaluation with regard to their market strength (horizontal axis) and competence (vertical axis) in the respective analyzed market segment.

The closer a company is to the center, the closer they are to meeting customers' requirements.

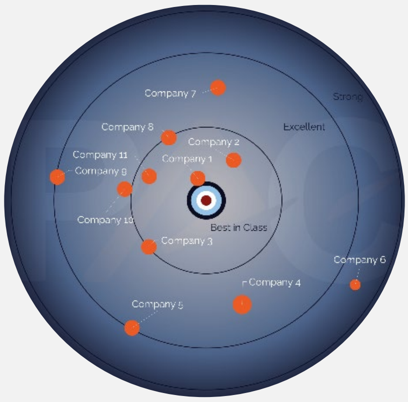

Fig. 8: PAC RADAR graph (exemplary presentation)

What is the PAC INNOVATION RADAR?

Concept and methodology of the PAC INNOVATION RADAR are similar to those of the traditional PAC RADAR.

While the traditional PAC RADAR focuses on mature market segments, the PAC INNOVATION RADAR, on the other hand, positions providers in new and innovative market segments, or in specific niche markets.

Thus, the focus of the evaluation is on the portfolio, vision, strategy, and early client engagements rather than on existing revenue numbers and resources

PAC INNOVATION RADAR graph

The PAC INNOVATION RADAR graph is a visual presentation of the results of the provider evaluation.

The closer a company is to the top right corner, the closer they are to meeting customers' requirements.

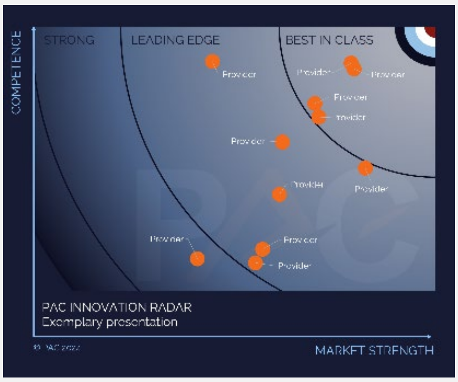

Fig. 9: PAC INNOVATION RADAR graph (exemplary presentation)

SCOPE

Customer Engagement

Spotlights IT service providers enabling digital transformation in customer-facing processes, spanning marketing, sales, service, and product development, where digital solutions are redefining insurer-customer and distributor interactions.

Risk & Claims Processes

Highlights IT service providers driving innovation in core insurance operations, covering underwriting, policy administration, claims management, and fraud detection, where efficiency, automation, and data-driven insights are becoming the new standard.

Life & Pension

Spotlights IT service providers enabling digital transformation in Life & Pension, focusing on policy administration, product innovation, and customer engagement tailored to retirement and investment products.

Property & Casualty

Highlights providers supporting digital modernization in Property & Casualty, emphasizing claims automation, risk management, underwriting efficiency, and customer service.

Health Insurance

Focuses on IT providers driving innovation in Health Insurance, including digital customer engagement, policy lifecycle management, analytics, and regulatory compliance.

Reinsurance

Showcases providers facilitating digital transformation in Reinsurance, with solutions for risk modeling, portfolio management, analytics, and operational efficiency across global and multi-line operations.

Overall Insurance RADAR

Highlights IT service providers driving digital transformation across the entire insurance ecosystem. It captures providers' capabilities to deliver innovation, operational excellence, and data-driven solutions across all insurance lines and functions.

PAC RADAR EVALUATION METHOD

Provider selection & participation

What providers are positioned in the PAC RADAR?

Providers are selected and invited according to the following criteria:

Size of revenues 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 focus on a specific customer group (e.g., SMBs).

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 RADAR analysis?

The decision as to which providers are considered in the PAC 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 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 participate actively?

Whether or not a provider participates in the RADAR process does not actually affect their inclusion and positioning in the PAC 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 RADAR gives the provider prominence amongst a broad readership as one of the leading players in the segment under consideration.

Considered providers by segment

Digital Transformation Services for Insurance Companies – DACH 2026	Digital Transformation Services for Insurance Companies – DACH 2026 Customer Engagement	Digital Transformation Services for Insurance Companies – DACH 2026 Risk & Claims	Digital Transformation Services for Insurance Companies – DACH 2026 Life & Pension
Accenture	Accenture	Accenture	Accenture
adesso	adesso	adesso	adesso
Arvato Systems	Arvato Systems	Arvato Systems	Arvato Systems
Atos	Atos	Atos	Atos
Capgemini	Capgemini	Capgemini	Capgemini
Cognizant	Cognizant	Cognizant	Cognizant
DXC Technology	DXC Technology	DXC Technology	DXC Technology
GFT	GFT	GFT	GFT
IBM	IBM	IBM	IBM
Infosys	Infosys	Infosys	Infosys
msg Group	msg Group	msg Group	msg Group
TCS	TCS	TCS	TCS

Digital Transformation Services for Insurance Companies – DACH 2026 Property & Casualty	Digital Transformation Services for Insurance Companies – DACH 2026 Health Insurance	Digital Transformation Services for Insurance Companies – DACH 2026 Reinsurance
Accenture	Accenture	Accenture
adesso	adesso	adesso
Arvato Systems	Arvato Systems	Arvato Systems
Atos	Atos	Atos
Capgemini	Capgemini	Capgemini
Cognizant	Cognizant	Cognizant
DXC Technology	DXC Technology	DXC Technology
GFT	GFT	IBM
IBM	IBM	Infosys
Infosys	Infosys	msg Group
msg Group	msg Group	TCS
TCS	TCS	

The concept

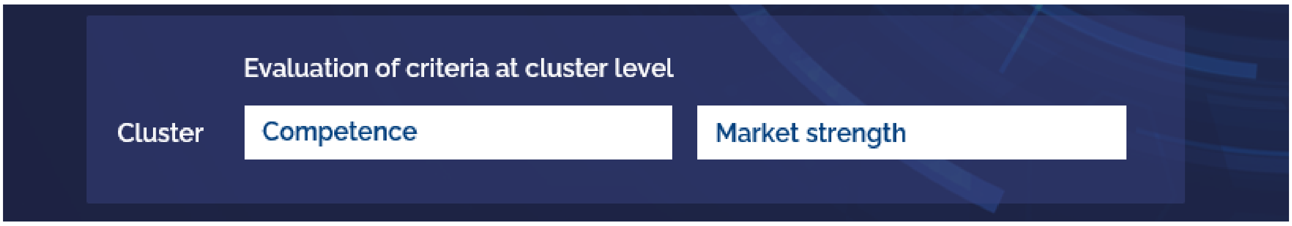

Fig. 10: PAC RADAR – evaluation method

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:

- The provider's detailed self-disclosure about resources, distribution, delivery, portfolio, contract design, pricing, customer structure, customer references, investments, partnerships, certifications, etc.;
- The analysis of existing PAC databases;
- Secondary research;
- Dedicated face-to-face interviews as relevant.

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, mainly 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 RADARs in which the provider participated;

Reissue of published RADARs

The scores in the PAC RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC RADAR is published.

The evaluation may not be directly comparable with that of any previous version due to subsequent content modifications. In particular, it does not depict a development of individual providers over time.

Methodological and/or organizational modifications may be made due to changing market conditions and trends, and may include:

- A different peer group in the focus of the analysis;
- Modification of individual criteria within clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria.

Evaluation criteria

General criteria

Competence	Market strength
• Portfolio: IT Services Value Chain Coverage	• Resources: Go-to-Market Regional Adaptation
• Portfolio: Insurance Services Value Chain Coverage (product, underwriting, policy, claims & supporting processes)	• Resources: Access to Global Delivery Resources
• Portfolio: Insurance Subvertical Coverage (Property & Casualty, Life & Pension, Health, Reinsurance)	• Resources: Geographic Proximity
• Portfolio: Relevant Intellectual Property (IP) (platforms, assets, etc.)	• Ecosystem Relevance & Partner Type Coverage (vertical, horizontal, associations, etc.)
• Portfolio: Perceived Degree of Innovation (Next-Gen Thinking)	• Ability to Service Multinational Insurance Groups
• References: Overall Reference Quality	• Segment Representation: Life & Pension
• References: Digital Customer Engagement	• Segment Representation: Property & Casualty
• References: Product Development & Underwriting	• Segment Representation: Health Insurance
• References: Policy Management	• Segment Representation: Reinsurance
• References: Claims Administration	• Insurance Market Presence – DACH
• References: IT Processes	• Corporate Transparency
• General Customer Experience (CX) Capability	
• General Data & Artificial Intelligence (AI) Capability	

Digital Transformation Services for Insurance Companies – DACH 2026

Dedicated criteria / criteria with higher weighting
• References: Digital Customer Engagement
• References: Product Development & Underwriting
• References: Claims Administration
• General Data & Artificial Intelligence (AI) Capability

Property & Casualty

Dedicated criteria / criteria with higher weighting
• References: Digital Customer Engagement
• References: Product Development & Underwriting
• References: Policy Management
• References: Claims Administration
• Segment Representation: Property & Casualty
• General Data & Artificial Intelligence (AI) Capability

Risk & Claims

Dedicated criteria / criteria with higher weighting

- Dedicated criteria / criteria with higher weighting
- References: Digital Customer Engagement
- References: Product Development & Underwriting
- References: Claims Administration
- General Data & Artificial Intelligence (AI) Capability

Customer Engagement

Dedicated criteria / criteria with higher weighting

- References: Digital Customer Engagement
- References: Product Development & Underwriting
- General Customer Experience (CX) Capability
- General Data & Artificial Intelligence (AI) Capability

Health Insurance

Dedicated criteria / criteria with higher weighting

- References: Digital Customer Engagement
- References: Product Development & Underwriting
- References: Policy Management
- References: Claims Administration
- Segment Representation: Health Insurance
- General Data & Artificial Intelligence (AI) Capability

Life & Pension

Dedicated criteria / criteria with higher weighting

- References: Product Development & Underwriting
- References: Policy Management
- References: Claims Administration
- Segment Representation: Life & Pension
- General Data & Artificial Intelligence (AI) Capability

Reinsurance

Dedicated criteria / criteria with higher weighting

- Segment Representation: Reinsurance
- General Data & Artificial Intelligence (AI) Capability

PAC RADAR REPORT LICENSE

PAC RADAR "Digital Transformation Services for Insurance Companies – DACH 2026 – Consolidated"

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ABOUT THE PAC RADAR

The PAC RADAR is a graphical representation and written analysis of the positioning of various IT providers within a defined market segment at a specific point in time. The positioning and characterization of selected companies within the PAC RADAR is conducted on the basis of an analytical assessment of criteria which PAC previously defined for this analysis.

The selection, positioning, and characterization of companies within the PAC RADAR is not subject to any vested interests whatsoever. PAC does not support any providers that are represented in the PAC RADAR, and does not give any recommendations to technology users. The PAC RADAR represents a result from market research only and must not be taken as a recommendation for action.

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More on www.pac-radar.com.

ABOUT PAC

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