

PRESS RELEASE

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LÜNENDONK RANKING: LEADING IN-HOUSE IT SERVICE PROVIDERS GROW DESPITE ECONOMIC DOWNTURN

- **In-house IT service providers increased their revenues by an average of 9.0 percent in 2025**
- **Focus topics: IT modernization, cyber security, process automation, and AI transformation**
- **Lünendonk Ranking now available free of charge**

Mindelheim, 21 July 2026 – In-house IT service providers continued their growth trajectory in 2025, increasing their revenues by an average of 9.0 percent. Key areas of investment include the modernization of IT landscapes, the expansion of cyber security, process automation, the development of new digital services, and AI transformation. Rising demands from business units and increasingly shorter technology cycles are expected to drive the growth of captive IT service providers in the years ahead.

The Lünendonk Ranking, published by Lünendonk & Hossenfelder for the fifth consecutive year, is now available for free download at www.luenendonk.de/en. It provides an overview of the leading in-house IT service providers in Germany — companies that generate more than 90 percent of their revenues from IT services within an organization and operate as legally independent entities.

The Ranking at a Glance

As in the previous year's ranking, three IT subsidiaries of financial companies lead the list. At the top is Allianz Technology with an estimated revenue of

3.3 billion euros and approximately 11,500 employees. Second place is held by Finanz Informatik, the IT service provider of the Sparkassen-Finanzgruppe, with revenues of around 2.7 billion euros. Third place goes to Atruvia, the digitalization partner of the cooperative financial group Volksbanken Raiffeisenbanken. The company increased its revenue by just under 13 percent to 2.5 billion euros and employs around 10,500 staff.

Fourth place is held by BWI, the digitalization partner of the Bundeswehr, with revenues of approximately 2.3 billion euros and just under 7,500 employees. As in 2024, BWI recorded revenue growth of around 16 percent in 2025, driven by a significant increase in the defense budget and the corresponding IT implementation. Fifth place goes to E.ON Digital Technology with revenues of nearly 1.2 billion euros.

Deutsche Post IT Services ranks sixth with an estimated revenue of 1 billion euros. Making its first appearance in the ranking is ERGO Technology & Services Management with revenues of just under 800 million euros. The strongest growth in the ranking is recorded by Bitmarck. The largest IT service provider for statutory health insurers increased its revenue by 21.6 percent to 535 million euros. The ranking is rounded out by dmTech (revenue of €312 million) and Salzgitter Digital Solutions (revenue of €122 million).

In total, the ten IT service providers generated revenues of around 14.7 billion euros in 2025 and employ more than 52,000 staff, representing a significant share of the overall German IT services market.

In-house IT Service Providers Optimistic About 2026 and 2027

In-house IT service providers anticipate continued positive revenue development for 2026 and 2027. "Key topics include IT modernization, cloud

transformation, cyber security, and process automation. At the same time, AI agents are set to be deployed more extensively — both within the captive IT service providers themselves and across their parent companies. In the area of artificial intelligence, the focus is increasingly shifting toward moving AI pilots into production and subsequently scaling them. This makes robust AI governance, high-performance data platforms, and a solid understanding of how AI works among employees ever more important," comments Tobias Ganowski, Senior Consultant at Lünendonk, on the findings.

Availability

The new Lünendonk Ranking 2026 "Leading In-House IT Service Providers in Germany" is now available for free download at www.luenendonk.de/en. It forms part of the Lünendonk Survey "The Market for IT Services in Germany," for which more than 100 IT service providers and over 200 IT decision-makers from upper mid-market companies as well as large enterprises and corporate groups were surveyed. The services offered by in-house IT service providers include, among others, the operation of applications, infrastructure, and cloud services, as well as IT consulting, software development, systems integration, and IT provider management. Legal entities and institutions under public law are not included. As some data from in-house IT service providers of DAX-40 companies and other corporate groups is unavailable and cannot be reliably estimated, the ranking does not claim to be exhaustive. The survey is expected to be available free of charge at www.luenendonk.de from the end of July 2026.

Company profile

Lünendonk: background information

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

The firm's portfolio includes surveys, publications and benchmarks as well as consultancy on trends, pricing, positioning and contracting procedures. With a large pool of data at its disposal, Lünendonk is able to provide clients with unique insights and recommendations. The market research and consulting company has been publishing the Lünendonk Lists and Surveys, regarded as market barometers, for decades now.

With years of experience, deep understanding, an outstanding network and 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 media jury to honour deserving companies and entrepreneurs with the Lünendonk Service Awards.

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