



# Digital Platforms for Connected Workers in Europe 2026

SITSI® | Vendor Analysis | PAC INNOVATION RADAR

## Positioning of TeamViewer

Lead analyst: Arnold Vogt  
July 2026



## TABLE OF CONTENTS

|                                                                                    |    |
|------------------------------------------------------------------------------------|----|
| PAC INNOVATION RADAR Graph.....                                                    | 4  |
| Smart Manufacturing Trends 2026.....                                               | 5  |
| Research Approach.....                                                             | 5  |
| Market Trend Analysis.....                                                         | 5  |
| Summary and Link to the PAC INNOVATION RADAR 2026.....                             | 8  |
| Market Situation – Digital Platforms for Connected Workers.....                    | 8  |
| Research Scope.....                                                                | 8  |
| Trends in the Vendor Landscape.....                                                | 9  |
| Important Capabilities of Leading Platforms.....                                   | 10 |
| Leading Vendors.....                                                               | 10 |
| PAC INNOVATION RADAR "Digital Platforms for Connected Workers in Europe 2026"..... | 12 |
| Review of Top-Seeded Provider TeamViewer.....                                      | 13 |
| TeamViewer – Best in Class.....                                                    | 13 |
| Appendix.....                                                                      | 14 |
| The PAC INNOVATION RADAR.....                                                      | 14 |
| Definitions & Segmentation.....                                                    | 14 |
| Provider Selection and Participation.....                                          | 16 |
| Evaluation Method.....                                                             | 16 |
| Evaluation Criteria.....                                                           | 17 |
| PAC RADAR Report License.....                                                      | 18 |
| About the PAC RADAR.....                                                           | 19 |
| About PAC.....                                                                     | 19 |

## TABLE OF FIGURES

|                                                                                                                    |    |
|--------------------------------------------------------------------------------------------------------------------|----|
| Fig. 1: PAC INNOVATION RADAR graph.....                                                                            | 4  |
| Fig. 1: Smart Manufacturing Trends 2026.....                                                                       | 7  |
| Fig. 2: Summary and Link to the PAC INNOVATION RADAR 2026.....                                                     | 8  |
| Fig. 3: Market segmentation according to different use cases for connected workers.....                            | 9  |
| Fig. 4: PAC INNOVATION RADAR graph.....                                                                            | 12 |
| Fig. 5: Criteria that resulted in a substantial up- or downgrading as compared to all participating providers..... | 13 |
| Fig. 6: PAC INNOVATION RADAR – segments analyzed.....                                                              | 15 |
| Fig. 7: PAC INNOVATION RADAR – evaluation method.....                                                              | 16 |
| Fig. 8: Digital Platforms for Connected Workers – evaluation criteria.....                                         | 17 |

## DOCUMENT INFORMATION

**Author:** Arnold Vogt ([a.vogt@pacanalyst.com](mailto:a.vogt@pacanalyst.com))

**Publication:** July 2026

**Scope ID:** Digital Innovation & IoT I Europe I 2026

**Portfolio ID:** SITSI I Vendor Analysis I PAC INNOVATION RADAR

**Related reports:** This document is part of a series of six PAC INNOVATION RADAR reports.

## PAC INNOVATION RADAR GRAPH

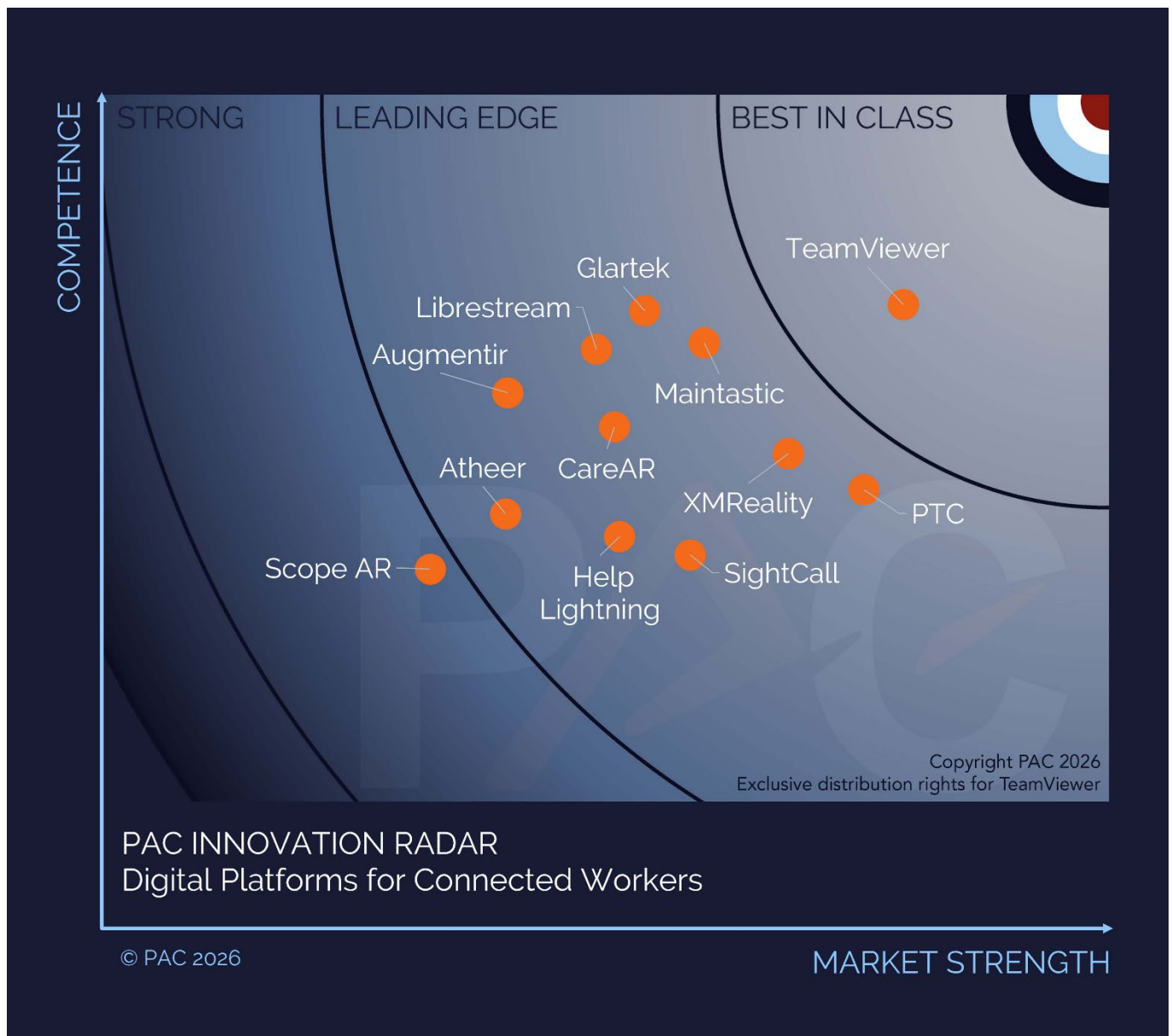


Fig. 1: PAC INNOVATION RADAR graph

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 RADAR.

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

The classification of providers is based on the overall score:

|                 |            |
|-----------------|------------|
| "Best in Class" | 1.0 – 1.99 |
| "Leading Edge"  | 2.0 – 2.99 |
| "Strong"        | 3.0 – 3.99 |

# SMART MANUFACTURING TRENDS 2026

Lighthouse factories lead the way into the future

## Research Approach

In January 2026, the World Economic Forum (WEF), in collaboration with McKinsey, published a list of new digital lighthouse factories worldwide. Lighthouses are manufacturing companies that show leadership in applying advanced digital technologies at scale and achieving significant improvements in productivity, resilience, sustainability, talent, and customer centricity by transforming factories, value chains, and business models. The initiative started in 2018 by scanning thousands of leading manufacturers for the most advanced factories. This led to the identification of the first 16 lighthouse factories. Today, more than 220 lighthouse factories are listed by the WEF, and the next round of applications to further expand the lighthouse community is already underway. The Advisory Board includes Aramco, Foxconn Industrial Internet, Koç Holding, McKinsey & Company, Schneider Electric, and Siemens.

PAC reviewed the list of 23 new lighthouse factories added in January 2026 to identify the most relevant trend topics based on the latest leading implementations of digital factory use cases worldwide. The main trends can be grouped around three aspects:

- Build a Digital Core to Scale Fast
- Run Industrial AI at Scale
- Apply Industrial AI to Frontier Areas

**“The list of lighthouse factories is an excellent repository of concrete examples to understand what direction the digital factory is heading into.”**

Arnold Vogt, Head of Digital & IoT, PAC

## Market Trend Analysis

We will use the structure mentioned above to introduce and discuss seven market trends.

**Build a Digital Core to Scale Fast: Lighthouse factories build a digital core to improve agility for the implementation of new digital solutions at scale**

Lighthouse factories continue to emphasize the importance of building a strong digital core to accelerate the

implementation of new digital solutions across factories. This covers integrated data platforms and MES applications that can serve as a system of record for industrial data. The car manufacturer **Ford Otomotiv San**, for example, established a fully connected, data-driven value chain in its factory in Yenikoy (Türkiye) to deal with global competition, rising customization demands for commercial vehicles, and fluctuating market dynamics. The site deployed over 60 in-house digital solutions using IoT, AI, machine learning, and digital twin technologies within **a unified data architecture** to enable real-time data flows. This allowed the factory to double its production volume, increase complexity 12-fold, raise labor productivity by 44%, and achieve a 6% quality improvement. Another example in this context is the textile company **Yueda Textile** (Yancheng, China). Its digital transformation enabled the site to move to **data-based operations**, boosting productivity by 421%, reducing defects by 90%, and cutting conversion costs by 26%. To achieve this, Yueda Textile implemented a total of 23 digital use cases, including smart logistics, digital traceability, and AI-driven performance management.

## Run Industrial AI at Scale: AI becomes an integrated part of digital deployments at scale

Lighthouse factories are implementing digital solutions at a substantial scale today, and AI is already an essential part of this game. One good example in this context is **Midea** in Wuhu (China), which provides kitchen and bath appliances. The site faced mounting complexity due to a complex distribution network and small-batch orders, alongside rising consumer expectations for shorter lead times and improved service quality. To address these issues, the company engineered a direct-to-consumer value chain with the help of **113 digital use cases, 35% of which were AI-driven**. Key solutions included real-time customer order management, an AI-enabled advanced planning & scheduling (APS) system, and a supply chain “control tower”. Plus GenAI-based assistance to enhance delivery and installation service quality. The initiative enhanced the consumer experience and provided three significant improvements: a 39% reduction in end-to-end delivery lead time, a 30% drop in inventory days, and an 86% reduction in the market defect rate. **Siemens Numerical Control** in Nanjing (China) operates in a highly variable manufacturing environment, managing high-mix, low-volume orders with monthly line changes and delivery timelines compressed from 45 to 10 days. The company launched a coordinated digital transformation, supported by a comprehensive toolkit spanning end-to-end digital twin technology, modular automation, advanced manufacturing operations, and **more than 50 AI-driven use cases**. The initiative reduced lead time by 78%, accelerated time-to-market by 33%, lowered field failures by 46%, and boosted productivity by 14%.

### Apply Industrial AI to Frontier Areas: Quality control becomes more sophisticated and linked to self-optimizing processes

Vision-based quality control has been a key use case in the digital factory context for years, and many successful implementations already exist. What we see emerging in the next step is that, on the one hand, quality control is applied to more complex use cases and, on the other hand, is combined with automated process optimization. The automotive supplier **Faurecia Automotive Systems** in Yancheng (China) faced persistent challenges due to quality-related costs and intense price pressure. To overcome these, the site launched a digital initiative, deploying over 40 advanced use cases that leverage machine learning, deep learning, and GenAI to create a **multimodal quality control system**. The system was designed to address complex, multi-sensory challenges, including noise; it led to a significant reduction in quality costs and overall cost pressure. The system resulted in a decrease in customer complaints of 94%, with associated costs down by 62.5%. Scrap costs were reduced by 75.8%, and overall equipment effectiveness (OEE) increased by 10.2%. The consumer battery supplier **EVE Energy** in Jingmen (China) deployed over 40 digital solutions, applying AIoT, simulation, LLMs, and AI across operations. In addition to predictive maintenance, these systems enabled **real-time quality diagnosis and process self-optimization**. This led to significant performance gains, including reducing the defect rate by 52%, lowering unit conversion costs by 41%, and boosting average overall equipment effectiveness (OEE) to 88%.

### Apply Industrial AI to Frontier Areas: The journey toward dark factories continues

In extension of the previous trends in quality control and self-optimizing processes, we generally observe that lighthouse factories continue to invest in new digital use cases to take industrial automation to the next level and gradually realize a dark factory. The CPG giant **Unilever** in Pondicherry (India) faced rising demand and product complexity, driven by accelerating innovation cycles. To overcome operational challenges related to throughput, quality, and flexibility, the site adopted digital solutions such as **ML-driven process control and changeover optimization** as well as **AI-powered, autonomous troubleshooting**. Its digital transformation led to 25% growth in output, 23% reduction in defects, and a threefold increase in product variants within existing production capacity. The beverage supplier **Haier Strauss Science & Technology** in Qingdao (China) deployed AI algorithms and 32 digital technology solutions, such as adaptive temperature control and auto-repair capabilities, for specific purposes. This helped Haier Qingdao achieve a

40% reduction in defect rates, a 72% drop in quality costs, and a 53% reduction in inventory turnover days.

### Apply Industrial AI to Frontier Areas: AI-based robotics and digital twin simulations help unlock the potential of physical AI

Lighthouse factories adapt to physical AI by applying technologies like AI-based robotics and digital twin simulations. **Huafon Chongqing Spandex** (Chongqing, China) is active in the chemical industry and has to meet growing customer demand for customization and higher product quality despite a rapid decline in market prices. To address this issue, Huafon Chongqing Spandex implemented 62 digital applications. These include AI-driven, high-precision process optimization, virtual sensing, and AI visual inspection, as well as **digital twin and robotics technologies**. These measures led to a 35% decline in quality defect rates, a 60% increase in labor productivity, and a 113% increase in net profit margins. The CPG giant **Unilever** in Hefei (China) faces growing constraints in e-commerce environments characterized by volatile demand, compressed delivery timelines, and sustained cost pressure. To address these challenges, Unilever's distribution center in Hefei transitioned to a factory-to-consumer model supported by 31 digitally enabled use cases, 65% of which are driven by AI and generative AI. This approach not only enabled capabilities such as daily demand forecasting and inventory decision-making, but also **intelligent picking** and AI-supported warehouse management. This transformation improved forecasting accuracy by 39%, reduced lead times by 75%, and lowered operating costs by 24%.

### Apply Industrial AI to Frontier Areas: Using AI to improve worker efficiency and satisfaction

Lighthouse factories implement AI not only to automate and optimize operations but also improve worker efficiency and satisfaction. **AUO Corporation** in Suzhou (China) is a manufacturer of display technologies that employs nearly 10,000 people but had to deal with high staff turnover. This was attributed to an insufficient focus on workers' needs, such as flexible working options, career development, and mental health support. High attrition rates put pressure on recruitment, training, production, and management. The company responded by implementing a range of digital solutions, including **AI interviews, digital training programs, smart scheduling, and LLM-based emotional care**. As a result, they upskilled more than 1,000 employees in digital capabilities, launched over 500 digital projects, reduced attrition by nearly 70%, and increased employee engagement by 11%. In addition, the company achieved a 29% boost in production, successfully positioning the workforce as a strategic asset.

The industrial automation supplier **Schneider Electric** (Wuhan, China) realized that only 20% of the workforce were skilled in automation, and the onboarding of new workers was very time-consuming (75 days), which resulted in high turnover rates. The factory responded by launching **digital apprenticeships co-designed with schools, AI-driven, personalized upskilling, and GenAI-supported maintenance procedures**. These initiatives cut onboarding to 15 days, upskilled 56% of the employees, and reduced technician turnover by 42% over five years.

#### Apply Industrial AI to Frontier Areas: Leveraging AI to improve R&D cycle time

Lighthouse factories use AI to accelerate their research and development processes. **Bristol Myers Squibb** in Devens (US), for example, a specialist in complex biologics and cell therapies, sought to overcome the scientific

complexity and variability inherent in its living cell-based business. Building on traditional methods, the site **merged biopharma science with AI and digital strategies** to create more than 30 new use cases. This approach boosted the company's performance, resulting in a 42% reduction in new product introduction (NPI) time and an increase of over 40% in volume. **Hisense Visual Technology** (Qingdao, China) operates in the TV market. The company faced rapidly evolving consumer demands alongside growing cost competition. In this environment, Hisense Qingdao had to deal with challenges in product development, processes, cost control, and manufacturing. To address these, the site **adopted AI, big data, simulation, and large-scale virtual reality (VR) throughout its new product R&D and manufacturing processes**. As a result, Hisense Qingdao reduced its R&D cycles by 34%, lowered material costs by 18%, and reduced new employee training time by 60%.

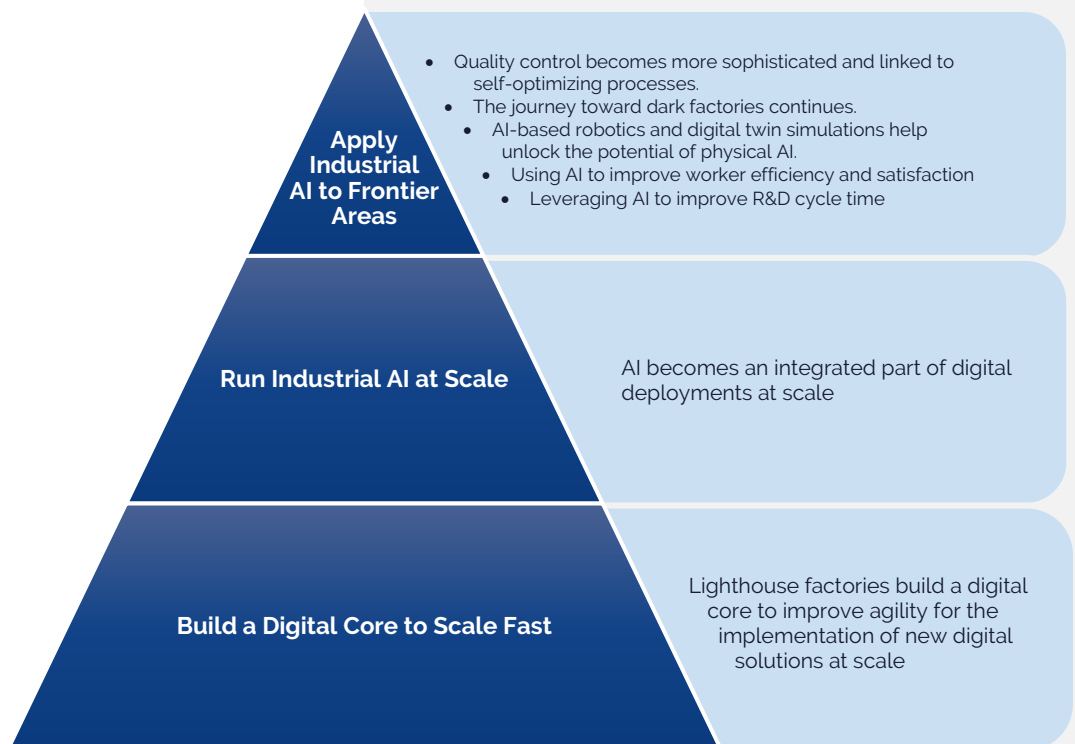


Fig. 1: Smart Manufacturing Trends 2026

## Summary and Link to the PAC INNOVATION RADAR 2026

### Summary of the trend analysis

In summary, leading factories start with a digital core, then scale the implementation of digital solutions and industrial AI and push AI usage in frontier areas like complex quality

control, self-optimizing processes, dark factory, physical AI, AI-supported workers, and AI-advanced R&D.

### Linking the trend topics to PAC INNOVATION RADAR 2026 research topics

The PAC RADAR 2026 on Digital Platforms and Service Providers for Industrial Use Cases can be directly linked to the trend topics highlighted above.

#### Build a Digital Core to Scale Fast & Run Industrial AI at Scale

#### Related PAC INNOVATION RADAR 2026 topics:

- Digital platforms for industrial edge management
- Digital service providers with multi-MES platform expertise
- Digital platforms for connected workers

#### Explore Frontier Industrial AI

#### Related PAC INNOVATION RADAR 2026 topics:

- GenAI-advanced industrial engineering
- Digital platforms for simulation-driven industrial operations
- Digital platforms for AI-based robots handling unknown objects

Fig. 2: Summary and Link to the PAC INNOVATION RADAR 2026

## MARKET SITUATION – DIGITAL PLATFORMS FOR CONNECTED WORKERS

### Research Scope

The above-mentioned examples of lighthouse factories (Schneider Electric and AUO Corporation) illustrate that the manufacturing industry is willing to further invest in improving worker efficiency and satisfaction through digital technology, specifically AI. Platforms for connected workers play a central role in this context, as they provide the digital backbone for content creation, orchestration, and delivery. According to our definition, these platforms support two fundamental use cases. First, all forms of digital work instructions, from basic visual guidance to AI-based verification, to ensure that work procedures are completed correctly. Second, remote expert services for mobile industrial workers, including digital support content and GenAI-based copilots for individual problem-

solving. As the platform market for these use cases continues to evolve, we continuously adapt our research scope.

To understand PAC's research focus in this context, it is helpful to understand the evolution of the research scope over the years. PAC started to evaluate the connected worker topic in 2019 and has adapted the scope continuously, in line with the market evolution. The starting point was a simple question: "What does augmented reality (AR) technology mean to the industrial world?" The initial vendor landscape was centered around AR-based platforms for industrial purposes. It included companies like PTC, Re'flect (today part of PTC), and Upskill (today part of TeamViewer). However, as we always take a user perspective, not a technology perspective, we shifted the scope in our market evaluations toward the main AR-related use case we identified in the market at the time, which focused on the visualization of work instructions for mobile workers. That is why PAC named the topic "Connected Workers (AR)." As a result, we included other vendors, such as Ubimax (today part of TeamViewer), who provided low-code platforms to create mobile work

instructions without a dedicated focus on AR (e.g., for picking in logistics). Over time, we have observed that the vendors in our analysis have started to gradually expand the scope of their platforms. In addition to the work instructions use case, remote expert capabilities have become increasingly relevant. The latter were particularly critical during the Covid-19 period (2020-22). As a result of this development, we have extended the scope of our research, evaluating connected worker platforms that address the needs of two fundamental use cases – digital work instructions and remote expert services for mobile workers in the factory and the field. This means that we have had to include more and more of the already existing, dedicated platform vendors of remote expert services, such as oculavis (rebranded as Maintastic in 2025), Librestream, and SightCall, because they have extended their scope beyond pure remote expert services and moved into the space of digital work instructions. In the past, we included platform vendors who provide digital services related to work instructions and/or remote expert services. In 2025, we changed the scope slightly; now we only evaluate vendors that provide a combined offering of digital work instructions and remote expert support for mobile industrial workers. This helps distinguish between solutions for digital work instructions dedicated to mobile workers and low-code MES solutions such as Tulip, which address work instructions for fixed workplaces in factories (typically via screens).

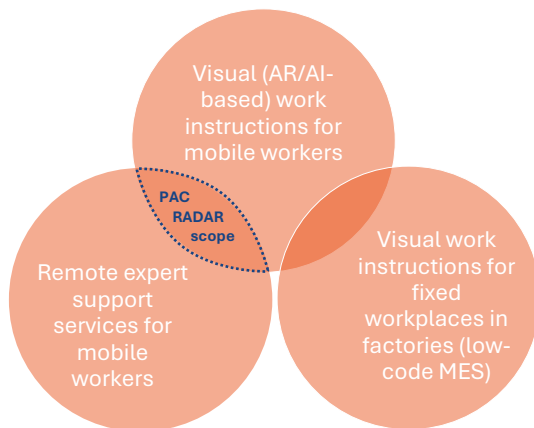


Fig. 3: Market segmentation according to different use cases for connected workers

## Trends in the Vendor Landscape

The slight shift in the research scope in 2025, as described above (focus on vendors with offerings related to digital work instructions and remote expert support), had a very limited impact on the evaluated vendor landscape. PAC only excluded Dassault Systèmes from the PAC RADAR analysis, as it offers AR-based work instructions without remote expert support services.

Another vendor that PAC excluded in the 2025 RADAR evaluation was Microsoft. This was based on two facts: first, Microsoft's offering for digital work instructions and remote expert support (Dynamics 365 Guides and Dynamics 365 Remote Assist) is tightly coupled with Microsoft's HoloLens, which will reach end of life in 2027; no replacement is available. Second, both offerings, Microsoft Dynamics 365 Guides and Dynamics 365 Remote Assist, will reach end of support at the end of 2026. According to Microsoft, they can be replaced by partner solutions or, to some degree, by Microsoft Teams Mobile, but only in selected remote-expert scenarios. As this does not meet our definition of a connected worker platform (support for remote experts and digital work instructions), Microsoft remains excluded from this evaluation for now.

Microsoft is only one example of the ongoing market consolidation. The driving force behind this is the fact that smart glasses with high-end AR capabilities, like Microsoft HoloLens, are still struggling to see broader adoption in the market (not convenient enough). As a result, the adoption of high-end AR use cases is also limited, and there are no customer projects at scale. Newer devices like Apple Vision Pro are no exceptions in this context. This is surprising, as many big vendors like Microsoft, Apple, and Meta invested a lot of money over several years to reach the tipping point of broader market adoption, but they failed. As these vendors are shifting their investment focus to AI, PAC doubts that we will see a breakthrough for industrial-grade smart glasses in the next 2-3 years.

As a result of the consolidation described above, PAC has identified two general trends in the vendor landscape: first, many small vendors are active in the connected worker space, often with a focus on specific countries and/or industries; however, they struggle to achieve broader adoption and improve their market position. The only exception, in our opinion, is the Swedish company XMReality. It is a Microsoft partner and seems to benefit from the fact that Microsoft is exiting this market. The company offers an industry-agnostic solution for various use cases that is easy to use and affordable. That is why XMReality is the only new vendor we added to our evaluation this year.

The second trend is for existing vendors in our evaluation to reposition their offerings. PTC started back in 2025 to consolidate its connected worker offering, repositioning it as an integrated add-on capability for its CAD and SLM (service lifecycle management) portfolio. Another proof point for this trend was the rebranding of oculavis as Maintastic in October 2025 in an attempt to reposition the company more toward CMMS (computerized maintenance management system). CMMS solutions help companies streamline asset management, schedule and monitor work orders, and gain full visibility into all maintenance operations. Another example in this context is Scope AR,

which was acquired by Flatirons Solutions in June 2026. Flatirons Solutions is a US-based MRO (maintenance, repair, and overhaul) solution provider with a focus on technical content management for the aerospace and defense industries.

**“While market consolidation continues, several providers of connected worker platforms are repositioning themselves toward maintenance and field service management.”**

Arnold Vogt, Head of Digital & IoT, PAC

## Important Capabilities of Leading Platforms

What differentiates a connected worker platform in today's market? The market consolidation that started in 2025 has had a direct impact on this issue. PAC has identified seven main aspects:

- Sufficient business performance (revenue, growth, profitability) to survive the current consolidation phase.
- New customer projects provide proof points for the continued relevance of the platform in the market.
- Market positioning around the most relevant connected worker use cases. This mainly includes worker guidance, instant problem-solving, and training.
- Expanding the scope of the existing platform to a broader level; for example, maintenance and field service management.
- Strategic partnerships that support vendors in their go-to-market.
- Leveraging AI to expand the value of the platform.
- Meeting the security and data privacy expectations of European customers.

## Leading Vendors

### TeamViewer

TeamViewer has defended its outstanding market position in connected worker platforms and remains the only Best-in-Class vendor in the PAC INNOVATION RADAR 2026. This rating is based on the following aspects:

First, TeamViewer can underpin the performance of its TeamViewer Frontline platform business with new customer wins. PAC estimates that TeamViewer's Frontline Worker business grew by double digits again in 2025. For

example, in December 2025, TeamViewer signed the largest deal in the history of its Frontline Worker business line. One of the world's largest consumer food and beverage producers confirmed the deployment of the Frontline picking solution across more than 350 warehouses. This deal illustrates the strong positioning of TeamViewer's connected worker platform with regard to the vision-based picking use case in warehouses and logistics centers. This is still the core use case for many new TeamViewer Frontline implementations at customers such as Samsung SDS (European spare parts operations for Samsung Electronics), GlobalFoundries (for the warehouses and inbound store facilities of the semiconductor manufacturer), Vandemoortele Group (for warehouses around food services and retail customers), Volvo Group (spare parts logistics for Volvo vehicles), and Brack.Alltron (parcel logistics services in Switzerland).

Second, TeamViewer has also demonstrated business growth outside vision picking in warehouses and logistics centers, expanding its go-to-market to other relevant areas, like training. TeamViewer rebranded its existing training and 3D learning capabilities as "Frontline Upskill" and expanded them through deeper CAD-based manufacturing and support use cases via a direct integration with Siemens Teamcenter (including Cortona3D RapidAuthor). These enhancements are intended to help customers accelerate onboarding and train in complex procedures for critical assets. One customer in this context is GE Aerospace, a supplier of aircraft engines. The company uses TeamViewer Frontline Upskill for realistic and cost-efficient remote training across hundreds of locations worldwide. Thanks to AR, the solution allows aircraft technicians to interact with digital twins of aircrafts and engines.

Third, no other vendor in our evaluation has established more strategic partnerships and joint solutions that are driving TeamViewer's go-to-market strength. The most relevant partnership in this context is certainly SAP. For years, TeamViewer's Frontline platform has been integrated with various SAP solutions, such as SAP Enterprise Warehouse Management (SAP EWM), SAP Field Service Management, SAP Digital Manufacturing Platform (MES solution), and SAP Service and Asset Manager. Other relevant partners are Siemens (Teamcenter PLM) and Manhattan Associates (warehouse management). An important proof point for its partner-first approach is that TeamViewer has no ambitions to build competing solutions in areas like field service management, instead integrating with and extending platforms such as ServiceNow, Salesforce, and SAP FSM. This is a strategic advantage for TeamViewer. Some competitors are forced to identify new growth opportunities and move into areas such as maintenance and field service management, putting them in direct competition with incumbent

vendors. TeamViewer avoids this and remains a strong ecosystem partner for leading vendors like ServiceNow, Salesforce, and SAP.

Fourth, while TeamViewer has further advanced its AR-based productivity platform for industrial workers in terms of scalability, standardization, and ecosystem integration in the past 12 months, the company has also increasingly focused on expanding into AI, sovereignty, and industry-specific compliance requirements. In the AI space, TeamViewer is currently moving into new AI-based use cases like visual pallet building and AI counting (both in proof-of-concept phase today). Visual pallet building supports faster palletizing via visualized stacking instructions and real-time verification. AI counting uses visual item recognition to automate object counting, ensuring the correct number of items are picked in fulfillment centers. Regarding sovereignty, Frontline has introduced offline and air-gapped support for key workflows in logistics and production. To make progress on industry-specific compliance requirements, Frontline obtained DCB0129 for clinical safety assessment in healthcare, which is specifically important in the UK and the Commonwealth.

#### **Glartek**

In 2026, PAC rated Glartek, a Portuguese start-up, as a Hidden Champion in the European connected worker market. This is based on the following aspects:

First, compared to other vendors in our evaluation, Glartek has a unique, relevant, and expanding market positioning that allows them to gradually strengthen their footprint within the existing client base. For years, Glartek has offered core platform capabilities around digital work instructions and remote expert support, combined with integrated skill management functions to track the status and development of frontline worker capabilities, plus team & task management and asset & inventory management. With its latest evolution step, Glartek is now moving into EHQS management (environment, health, quality, safety) for regulated and asset-intensive industries. This addresses the specific needs of a niche market

but covers a broad range of aspects, such as incident and risk management, inspections, predictive alerts, audits and regulatory compliance tracking, environmental reporting, training records, certifications, and contractor and safety management. In short, unifying safety, quality, and compliance in a single platform for complete control over worker-intensive operations.

Second, to bring the above-mentioned capabilities to market, Glartek launched version 4.0 of its platform in 2025 and established strategic partnerships with relevant vendors in this field to support its go-to-market. One partner is Enhesa, a provider of regulatory intelligence. Enhesa brings regulatory expertise, delivering continuously updated EHS legal requirements and actionable compliance intelligence across jurisdictions worldwide. Through this partnership, Enhesa's regulatory intelligence will be embedded in Glartek's platform to support risk identification, safety tasks, and compliance-related decision-making. By embedding regulatory insight directly in day-to-day operations, organizations can ensure that policy and practice go hand in hand, reducing compliance risk and achieving greater consistency across sites and regions. A similar partnership exists with STP ComplianceEHS. This approach strengthens Glartek's knowledge base in the platform and allows them to combine it with AI capabilities for further processing.

Third, to add AI capabilities to the platform, Glartek launched Gil in early 2026, an AI agent based on Microsoft Copilot. Frontline workers can ask Gil for real-time information about safety incidents and can delegate specific actions to Gil to automate processes. For example, the agent can autonomously trigger notifications to teams when performance indicators change.

Fourth, although the number of new customer references is limited, PAC believes that Glartek's financial situation is not far from breakeven. Glartek is a small company with an attractive list of customers, such as Daimler Truck, Bosch, and Veolia. Addressing their specific needs is a good approach to expanding in these accounts and adding similar target clients with the same needs.

# PAC INNOVATION RADAR “DIGITAL PLATFORMS FOR CONNECTED WORKERS IN EUROPE 2026”

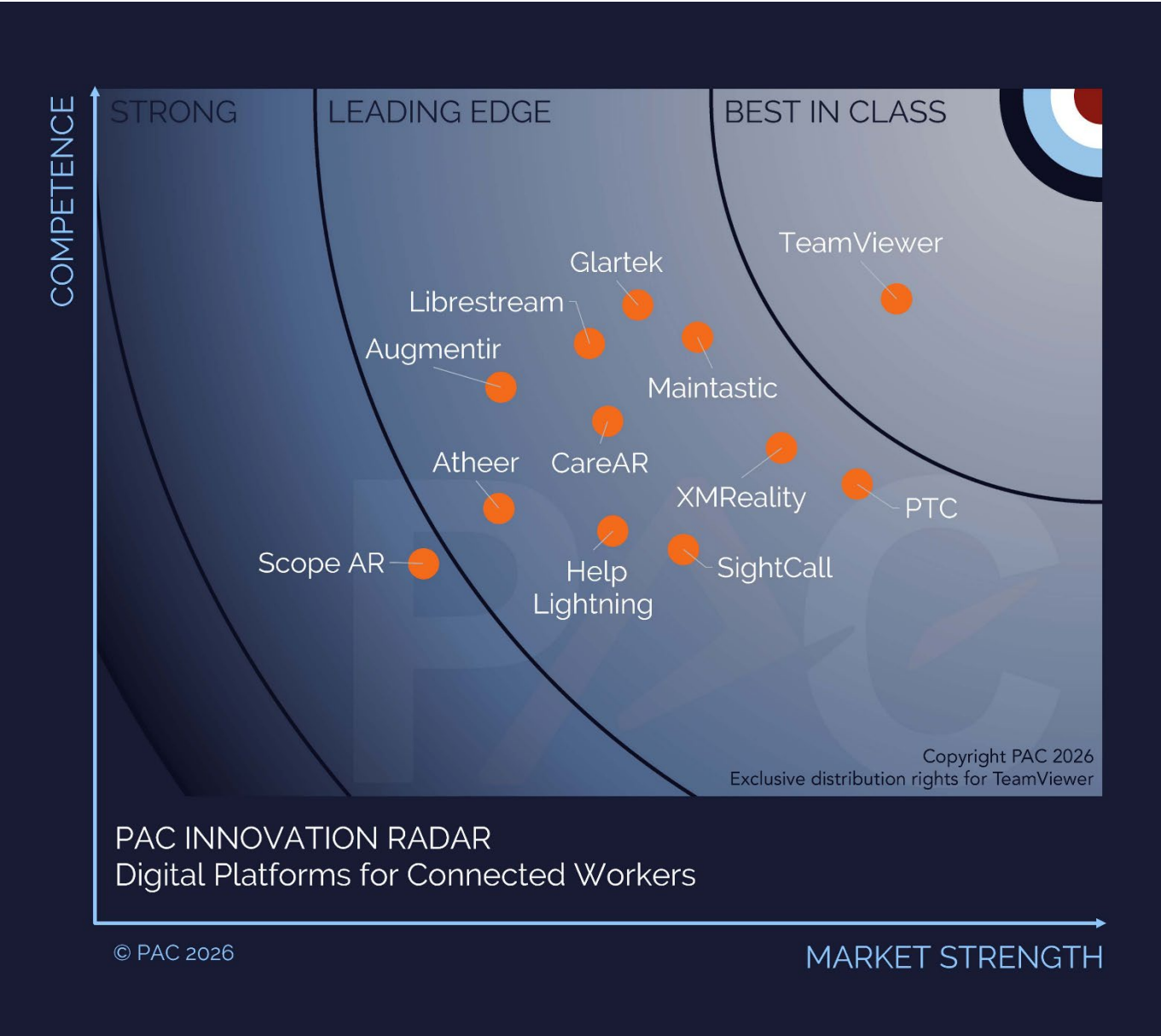


Fig. 4: PAC INNOVATION RADAR graph

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 RADAR.

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

The classification of providers is based on the overall score:

|                 |            |
|-----------------|------------|
| "Best in Class" | 1.0 – 1.99 |
| "Leading Edge"  | 2.0 – 2.99 |
| "Strong"        | 3.0 – 3.99 |

REVIEW OF TOP-SEEDED PROVIDER TEAMVIEWER

TeamViewer – Best in Class



Fig. 5: Criteria that resulted in a substantial up- or downgrading as compared to all participating providers

## APPENDIX

### The PAC INNOVATION 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/or 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.

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

### Definitions & Segmentation

A **digital platform** provides tools for various use cases and continually expands to meet the broader needs of its target audience. This typically includes product- and service-related marketplaces as well as content-sharing and collaboration capabilities around a specific topic.

A technical integration layer, development capabilities, and a partner-oriented business model help ensure platform growth and technical interoperability.

A vendor of **services around digital platforms** provides consulting, system integration and managed services for various industrial use cases around relevant platforms. The providers continually seek to expand to new services and use cases to meet the diverse, holistic, and changing demands of their customers. To realize this, digital service providers need dedicated, platform-related expertise and a strong ecosystem of platform partners.

### Specific PAC definitions used in this RADAR

#### Digital Platforms for:

**Industrial edge management:** These platforms use concepts from the IT world, such as container and virtualization technologies or app store and DevOps models, for more agile application lifecycle management at the industrial edge (OT world). In this space, apps around AI, machine vision, and virtual PLCs are gaining in relevance to realize the vision of software-defined automation. Machine builders and factory managers use these platforms to manage PLCs and IPCs across their installed base of machines and factories.

**Connected workers:** Work instructions, visual guidance, digital support content, and remote expert services for mobile industrial workers are central capabilities of this type of platform. Today, GenAI for the instant creation of step-by-step work instructions, remote support, and work procedure documentation is becoming more relevant. In addition, autonomous systems such as robots and drones are emerging, becoming coworkers on inspection tours.

**GenAI-advanced industrial engineering:** This category evaluates PLM/CAD-related platforms with integrated, GenAI-based capabilities for various use cases in the industrial engineering workflow. This includes, for example, generative design for optimized 3D CAD models, analysis of complex requirement documents, machine coding, technical documentation, automated test procedures, and synthetic image generation to train visual inspection systems.

**AI-based robots handling unknown objects:** While the introduction of AI-advanced humanoid robots in industrial operations will take more time to become a reality, this evaluation focuses on robot foundation models for picking & placing of unknown objects. PAC considers this a promising initial AI-based use case and expects growing adoption. These platforms provide proprietary and ready-to-use AI models, potentially combined with low-code/no-code capabilities to fine-tune them.

**Simulation-driven industrial operations:** The vision of the industrial metaverse is to combine visual process simulation for large and complex industrial systems, processes, and environments with the user experience of computer games – with photo-realistic, collaborative, and intuitive interactions. Like in the past, PAC still considers highly realistic and interactive digital twin simulations to optimize industrial operations (factories, warehouses) as a core use case for the industrial metaverse. PAC evaluates platforms in this category with low-code/no-code capabilities, typically linked to NVIDIA Omniverse for real-time simulation.

#### Digital Service Providers:

**With multi-MES platform expertise:** MES (including MOM) is not a new topic, and many platforms for different needs have existed for years. While many C&SI providers have strong capabilities related to one leading MES platform, PAC wants to provide transparency on those C&SI providers with dedicated know-how across multiple MES platforms. This will help customers identify service providers with more vendor-independent and broader expertise. In this RADAR, we focus on MES platforms from well-established vendors like Siemens, Dassault Systèmes, Rockwell Automation, SAP, AVEVA, MPDV, Critical Manufacturing, and Tulip, who serve not only large enterprise customers but also mid-market clients in Europe.

#### Segmentation

PAC is going to evaluate the providers of digital platforms and services in Europe in six PAC INNOVATION RADAR segments dedicated to specific use cases:

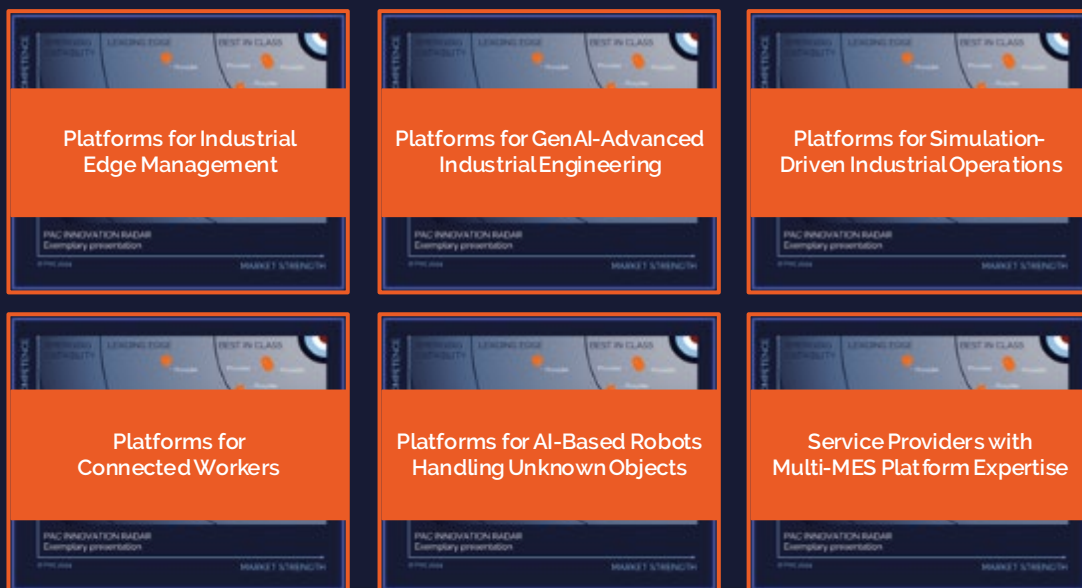


Fig. 6: PAC INNOVATION RADAR – segments analyzed

## Provider Selection and Participation

### What providers are positioned in the PAC INNOVATION 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 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 participate actively?

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 players in the segment under consideration.

## Evaluation Method

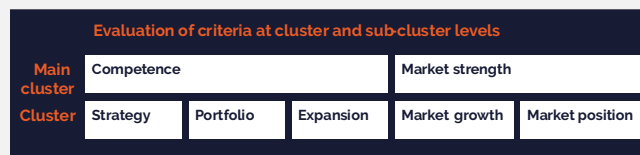


Fig. 7: PAC INNOVATION RADAR – evaluation method

PAC uses predefined criteria to assess and compare the providers within given service segments.

The assessment is based on:

- The provider's self-disclosure via questionnaire;
- A briefing call about the provider's organization, resources, approaches, portfolio, customer focus, customer references, investments, partnerships, certifications, etc.;
- If applicable, a poll among customers by PAC;
- The analysis of existing PAC databases;
- Secondary research.

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.

Based on the scores in competence and market strength, the overall score is calculated. The overall score is calculated by using the weighted criteria assigned to the "Competence" and "Market Strength" clusters. 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.

## Reissue of published RADARs

The assessments in the PAC INNOVATION RADAR represent an assessment of the providers within the given peer group in the year in which the respective PAC INNOVATION RADAR was published.

The evaluations may not be directly comparable with those of any previous version due to subsequent content modifications. In particular, they do 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 and sub-clusters;
- Increased or altered expectations by user companies;
- Adjustment of the weighting of individual criteria

## Evaluation Criteria

### Digital Platforms for Connected Workers

#### COMPETENCE



##### STRATEGY

Vision  
Strategic activities in the last 12 months  
Unique selling proposition (USP)



##### PORTFOLIO

Addressed industrial use cases  
Portfolio quality based on client references  
Integrated AI capabilities



##### EXPANSION

Expansion of go-to-market  
Expansion to new use cases  
Expansion to new technology

#### MARKET STRENGTH



##### MARKET GROWTH

Market perception in Europe  
Momentum



##### MARKET POSITION

Ecosystem of partners  
Client base and relationships in Europe

Fig. 8: Digital Platforms for Connected Workers – evaluation criteria

## PAC RADAR REPORT LICENSE

### PAC INNOVATION RADAR “Digital Platforms for Connected Workers in Europe 2026”

#### Unlimited reprint rights

Within the framework of the license with unlimited reprint rights the customer receives a PAC RADAR short report, a PAC RADAR graphic, and a PAC RADAR badge. Their usage and distribution to external parties is expressly permitted, without any limitations. The customer is entitled to use the contents of this PAC RADAR short report as well as the PAC RADAR graphic and badge, either completely or partially (e.g., individual text sections or graphics), for all marketing and communications purposes.

In any usage and distribution, all contents of the PAC RADAR short report, the PAC RADAR graphic, and the PAC RADAR badge must always be marked with the “PAC” source reference. However, the contents must not be manipulated or deployed in such a way that changes the context.

The usage rights defined within the license with unlimited reprint rights refer to the PAC RADAR short report, the PAC RADAR graphic, and the PAC RADAR badge, however, under no circumstances include the usage of the contents of the full version of the PAC RADAR report.

Moreover, copyright conditions for the PAC RADAR apply (see [About the PAC RADAR](#)).

## ABOUT THE PAC RADAR

The PAC RADAR is protected by Pierre Audoin Consultants (PAC) GmbH's copyright.

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.

The contents of the PAC RADAR have been created with utmost diligence and care. However, PAC cannot be held responsible for any errors or omissions.

PAC excludes all express or implied claims, also if derived from warranties with respect to the PAC RADAR report, including any implied warranties of merchantability or fitness for a particular purpose.

The PAC RADAR may only be used for a license fee and with the consent of PAC. Moreover, the use and publication of the contents and the results of the PAC RADAR are subject to the "Terms & Conditions for the Usage of Pierre Audoin Consultants' SITSI® License".

Copyright Pierre Audoin Consultants (PAC) GmbH 2026. All rights reserved.

## ABOUT PAC

We are a content-based company with a consulting DNA. PAC is the leading European consulting and analyst firm supporting software & IT service vendors worldwide. Since 1976, we have helped our clients to understand market dynamics, grow their revenue and raise their profile. Our unrivalled understanding of European markets, and deep research coverage help key market players to define their strategy, optimize their go-to-market and increase market share. PAC is an analyst-led consultancy with a team of over 100 experts across Europe. We provide market research and analysis on more than 30 countries worldwide, delivered through our portfolio pillars, Guidance, Insights, and Visibility, and our renowned SITSI® research platform.

More on [www.pacanalyst.com](http://www.pacanalyst.com).