# **An Analysis of the Axians Customer Ecosystem and Market Strategy**

## **Executive Summary**

This report provides a comprehensive analysis of the customer base and market strategy of Axians, the Information and Communication Technology (ICT) brand of VINCI Energies. The findings indicate that Axians serves a diverse, Europe-centric customer base, leveraging a decentralized, expert-led operational model. The company exhibits deep specialization in key verticals, most notably the public sector and industrial manufacturing, where it delivers complex digital transformation projects. Its growth is fueled by a dual strategy of organic development and targeted acquisitions, which are used to infuse specific technological capabilities and expand its geographic footprint. The solutions portfolio is heavily dependent on strategic partnerships with global technology leaders, particularly SAP and Cisco. Ultimately, Axians' principal competitive advantage is its ability to fuse the financial stability, long-term vision, and access to critical infrastructure projects of a major industrial group, VINCI, with the agility, deep specialization, and local market knowledge of its numerous business units.

## **Axians' Market Posture and Service Architecture**

### **The VINCI Energies Symbiosis: A Foundation of Stability and Strategic Alignment**

Axians operates not as a standalone entity but as the designated global brand for ICT services within the VINCI Energies business line, which itself is a core component of the VINCI conglomerate.1 This relationship is fundamental to understanding Axians' strategy and market position. The financial strength of the parent organization provides a stable foundation for long-term projects and investments. In 2023, VINCI Energies reported total revenue of €19.3 billion, a 15% increase over the previous year, underscoring the scale and growth trajectory of the business line within which Axians operates.4

This financial backing is directly linked to VINCI's overarching corporate strategy, which is explicitly focused on capitalizing on two global "megatrends": the energy transition and the digital revolution.3 Axians serves as the primary vehicle for executing the digital revolution component of this strategy. This alignment provides Axians with a distinct market advantage, enabling it to participate in large-scale, strategic initiatives that pure-play IT service providers might struggle to access. Projects such as developing a digital twin for the Port of Rotterdam or implementing smart city solutions are direct manifestations of this synergy, positioning Axians as an integral partner in critical infrastructure modernization.6

Furthermore, the financial power of VINCI Energies facilitates a strategic and aggressive acquisition strategy. This approach is not focused on merely absorbing revenue but on systematically infusing new capabilities and market access into the Axians network. For instance, the acquisition of German SAP specialist Lynx-Consulting was a deliberate move to establish Axians as a "leading SAP specialist in Germany".3 Similarly, the acquisition of a major portion of Kontron AG's IT services business expanded Axians' presence across ten countries in Central and Eastern Europe, including Poland and the Czech Republic.9 This pattern reveals a clear methodology: identify a strategic gap in technology or geography, acquire a best-in-class regional player to fill it, and thereby rapidly accelerate both service capability and market penetration.

### **A Decentralized Network of Specialists: Global Reach with a Local Touch**

Axians' operational structure is best described as an "agile corporate network of specialized ICT service providers and software manufacturers".11 This decentralized model eschews a monolithic, top-down corporate hierarchy in favor of empowering specialized, often locally-focused, business units. This structure allows the company to present a dual face to the market: it can leverage the scale and financial backing of VINCI to compete with global systems integrators, while its local units offer the deep regional knowledge and tailored solutions required to compete effectively against smaller, niche competitors.

Key examples of these specialized units include:

* **Axians Infoma (Germany):** A long-standing entity with over 35 years of experience providing highly tailored software and services to German public administrations and municipalities.12
* **Axians Amanox (Switzerland):** A recognized specialist in cloud technologies, particularly AWS serverless architecture and migration services.14
* **Axians NEO Solutions & Technology (Germany):** A unit focused on the niche market of SAP-based solutions for field service and maintenance processes.15
* **Regional Entities:** Country-specific operations such as Axians UK, Axians Netherlands, and Axians Portugal maintain localized market knowledge and customer relationships, enabling them to address specific regional needs.16

While this decentralized model provides significant agility, it also presents challenges in delivering standardized, cross-border services. Axians has demonstrated a mature understanding of this limitation and has responded with strategic centralization where necessary. The establishment of an international Security Operations Center (SOC) hub in Basel, Switzerland, is a prime example.19 This SOC connects over 300 cybersecurity specialists from multiple countries, including Germany, the Czech Republic, the Netherlands, and France, to provide a unified defense against threats to both ICT and industrial Operating Technology (OT). This move indicates a proactive strategy to build cohesive, high-value services that transcend the decentralized model, offering clients the best of both worlds: local expertise backed by global, standardized security operations.

## **Comprehensive Customer Directory**

The following table presents a list of identifiable Axians customers compiled from publicly available case studies, press releases, and partner websites. This list is extensive but should not be considered exhaustive, as it does not include clients under non-disclosure agreements or those not publicly promoted. The data provides a foundational view of the key markets and verticals where Axians is active.

| Customer Name | Country | Industry |
| --- | --- | --- |
| Aalen, Municipality of | Germany | Government and Local Authorities |
| Akademia Górniczo-Hutnicza (AGH) | Poland | Education and Research |
| AQUALEX | Belgium | Manufacturing |
| Aventus | Netherlands | Education and Research |
| AZ Klina | Belgium | Healthcare |
| Beerens Groep | Belgium | Diversified |
| Bremer Landesbank | Germany | Banking and Insurance |
| Business Moves Group (BMG) | United Kingdom | Professional Services |
| Church of Sweden | Sweden | Government and Local Authorities |
| CNH Industrial Zedelgem (CNHi) | Belgium | Agriculture / Manufacturing |
| Congreso de los Diputados | Spain | Government and Local Authorities |
| Covéa Insurance | United Kingdom | Banking and Insurance |
| Datanet | United Kingdom | Carrier and Service Provider |
| De Wilde Wijngaard | Belgium | Agriculture / Food & Beverage |
| Diabetes Liga | Belgium | Healthcare |
| Dormer Pramet | Czech Republic | Industry (Manufacturing) |
| EDHEC Business School | France | Education and Research |
| Enexis | Netherlands | Utilities |
| Frutura | Austria | Industry (Food & Beverage) |
| Fujirebio Europe | Belgium | Healthcare / Medical Technology |
| G. Englmayer Spedition GmbH | Austria | Industry (Logistics) |
| Galliker | Switzerland | Industry (Logistics) |
| GÉANT | Pan-European | Education and Research |
| Geldof | Belgium | Manufacturing |
| Gigaclear | United Kingdom | Carrier and Service Provider |
| Hoogvliet | Netherlands | Retail |
| Imeldaziekenhuis | Belgium | Healthcare |
| ITAA | Belgium | Professional Services |
| Jisc (Janet Network) | United Kingdom | Education and Research |
| London School of Economics (LSE) | United Kingdom | Education and Research |
| MAGNA Automotive Stity s.r.o. | Czech Republic | Industry (Automotive) |
| MATMUT Stadium (via Orange) | France | Media, Culture and Sport |
| Miele | Germany | Industry (Manufacturing) |
| Military University of Technology (WAT) | Poland | Education and Research |
| Mobiliar | Switzerland | Banking and Insurance |
| Nipro Europe | Belgium | Healthcare / Medical Technology |
| NOVA School of Business and Economics | Portugal | Education and Research |
| Panike | Portugal | Industry (Food & Beverage) |
| Pantein | Netherlands | Healthcare |
| Pentalver | United Kingdom | Industry (Logistics) |
| Pflegezentrum Süssbach | Switzerland | Healthcare |
| Polyclinique du Cotentin | France | Healthcare |
| Port of Rotterdam | Netherlands | Transportation Infrastructures |
| QnAI (Dr. Christian Mueller) | Switzerland | Education / Technology |
| Raiffeisen | Switzerland | Banking and Finance |
| Royal Eijkelkamp | Netherlands | Industry (Manufacturing) |
| SBB (Swiss Federal Railways) | Switzerland | Transportation Infrastructures |
| Simpools | Belgium | Manufacturing / Retail |
| Smile Insurances | Switzerland | Banking and Insurance |
| Somerset NHS Partnership | United Kingdom | Healthcare |
| Storck | Germany | Industry (Consumer Goods) |
| Store of the Future | Netherlands | Retail |
| SureVOIP | United Kingdom | Carrier and Service Provider |
| TenCate Grass | Netherlands | Industry (Manufacturing) |
| The Landstede Group | Netherlands | Education and Research |
| UMCG (University Medical Center Groningen) | Netherlands | Healthcare |
| Universitätsklinikum Freiburg | Germany | Healthcare |
| Versluys Group | Belgium | Diversified |
| VINCI (Archipel Campus) | France | Corporate |
| Vitafor | Belgium | Industry (Agriculture) |
| Vista Augenpraxen & Kliniken | Switzerland | Healthcare |
| Weidmüller | Germany | Industry (Manufacturing) |
| World of Wine | Portugal | Retail / Tourism |
| Zen Internet | United Kingdom | Carrier and Service Provider |

## **Analysis of the Axians Customer Portfolio**

An analysis of the publicly disclosed customer base reveals distinct patterns in Axians' strategic focus, highlighting concentrations in specific industry verticals and geographic regions.

|  | Germany | UK | Benelux | Iberia | CEE | Switzerland | France | Pan-European |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Government & Public Sector** | 2 |  |  | 1 |  |  |  | 1 |
| **Industry & Manufacturing** | 3 | 1 | 5 | 1 | 2 |  |  |  |
| **Education & Research** |  | 2 | 2 | 1 | 2 | 1 | 1 | 1 |
| **Healthcare** | 2 | 1 | 7 |  |  | 3 | 1 |  |
| **Carrier & Service Provider** |  | 4 |  |  |  |  |  |  |
| **Banking & Insurance** | 1 | 1 |  |  |  | 2 |  |  |
| **Retail & Tourism** |  |  | 2 | 2 |  |  |  |  |
| **Transportation** |  |  | 1 |  |  | 1 |  |  |

*Table 2: Summary of identified Axians customers by industry and primary region of engagement. "Benelux" includes Belgium and the Netherlands. "Iberia" includes Spain and Portugal. "CEE" includes Poland and the Czech Republic. Note: Counts are based on the customer list in Section 3.*

### **Analysis by Industry Vertical**

* **Industry & Manufacturing:** This is a clear strategic focus, particularly for projects involving the digital transformation of industrial processes. Axians demonstrates a core competency in deploying SAP-centric solutions for clients such as **Dormer Pramet** (paperless manufacturing), **MAGNA Automotive** (SAP S/4HANA deployment), and **Frutura** (supply chain digitalization).12 The work with Portuguese bakery  
  **Panike** on AI-driven production optimization further showcases a move towards higher-value, data-intensive industrial solutions.21
* **Healthcare:** This is a significant and growing vertical, especially in the Benelux region. Engagements range from improving the patient experience with the myHealthbox kiosk solution for **Imeldaziekenhuis** and **AZ Klina** in Belgium to providing advanced digital learning environments for **Nipro Europe**.22 In Germany, Axians has delivered large-scale network infrastructure for major hospitals like  
  **Universitätsklinikum Freiburg**.24
* **Education & Research:** Axians has a strong footprint in this sector across Europe. High-profile projects include a comprehensive SAP implementation for the **Military University of Technology (WAT)** in Poland, network services for the pan-European research network **GÉANT**, and delivering Network as a Service (NaaS) to **The Landstede Group** in the Netherlands.25
* **Government & Public Sector:** This vertical represents an area of deep, localized specialization. The most prominent example is in Germany, where the **Axians Infoma** business unit has served municipalities like **Aalen** for decades, providing tailored financial management software.13 Other key public sector clients include the  
  **Church of Sweden** (cybersecurity) and the Spanish Parliament, the **Congreso de los Diputados** (network modernization).12
* **Carrier & Service Providers:** This is a foundational market for Axians, reflecting its expertise as a network systems integrator. The company supports clients like **Gigaclear** and **Zen Internet** in the UK with network scaling and digital transformation services.16

### **Analysis by Geographic Footprint**

The customer data confirms a heavy concentration in Western and Central Europe.

* **Germany, France, the UK, and the Benelux region** appear to be the most mature markets, with a high density of documented customers across multiple industries.
* The **Iberian Peninsula** (Spain and Portugal) shows robust activity, with innovative projects like the visitor analytics platform for **World of Wine** in Portugal and the network overhaul for the Spanish Parliament.12
* A strategic expansion into **Central and Eastern Europe** is evident, driven by acquisitions and securing major projects like the SAP implementation at Poland's **Military University of Technology** and SAP work for **Dormer Pramet** in the Czech Republic.12
* **North America** is mentioned as part of Axians' global presence, but the available customer case studies are primarily focused on European engagements, suggesting the Americas are a market targeted for future growth.29

This geographic distribution is not arbitrary; it is often tied to a specific local specialization. The company's strength in the German public sector is inextricably linked to the deep expertise of its local Axians Infoma unit. Likewise, its cloud capabilities in Switzerland are bolstered by the Axians Amanox team. This indicates a market entry and growth strategy built around establishing or acquiring a "center of excellence" in a target country, which then serves as a beachhead for broader expansion and service delivery.

## **In-Depth Customer Profiles**

The following profiles provide a qualitative deep-dive into representative Axians projects, illustrating the challenges clients face and the solutions Axians delivers.

### **Government & Public Sector**

**Customer: Aalen, Germany** 13

* **Challenge:** The city of Aalen, a municipality in Baden-Württemberg, needed to transition its administrative functions from legacy, paper-based workflows to a modern, efficient digital system. This was part of a broader push towards digitalization within German public administration.
* **Solution:** Axians, through its specialized public sector entity Axians Infoma, implemented a multi-faceted solution. The cornerstone was the Axians Infoma Financial Management software, which streamlined core processes for orders, invoices, and approvals. This was later augmented with the Infoma AppSpace platform to enable decentralized invoicing, pushing efficiency further out to various departments.

**Customer: Church of Sweden** 12

* **Challenge:** Following a major cyberattack, the Church of Sweden required a robust security partner to protect its critical IT systems and ensure the continuity of its operations on a 24/7 basis.
* **Solution:** The Church of Sweden entered into a partnership with Axians for comprehensive cybersecurity services. This engagement involves continuous monitoring and protection of the church's IT environment, leveraging Axians' expertise to defend against sophisticated cyber threats.

### **Industry & Manufacturing**

**Customer: Panike, Portugal** 12

* **Challenge:** As Portugal's leading supplier of frozen bakery products, Panike faced significant operational hurdles in automating processes, aggregating data for decision-making, and visualizing its production lines. The primary goals were to optimize equipment downtime, reduce product waste, and increase overall production.
* **Solution:** Axians initiated an exploratory, self-financed project to demonstrate the value of advanced technologies. In collaboration with its sister brand Actemium for OT expertise, Axians developed a Digital Twin simulator focused on quality and energy savings. This allowed Panike to test "what-if" scenarios for different product recipes. An AI-driven production planning system was also created, which suggested optimal production sequences to minimize downtime. The trial resulted in a 20% reduction in planned downtime for product changeovers.

**Customer: Frutura, Austria** 12

* **Challenge:** A major producer of fresh fruits and vegetables, Frutura's growth was hampered by outdated, manual supply chain processes. The reliance on emails and fragmented tools created a lack of transparency and risked operational efficiency, product quality, and customer satisfaction.
* **Solution:** Frutura engaged Axians for program management in a large-scale digital transformation centered on SAP. The project involved implementing SAP S/4HANA and connecting to suppliers via SAP Business Network Supply Chain Collaboration. This automated the entire procure-to-pay process, from purchase orders and confirmations to invoicing. The solution established clear business rules, such as preventing invoicing before a goods receipt is posted, resulting in 99% of supplier invoices flowing through error-free without human intervention.

### **Education & Research**

**Customer: Military University of Technology (WAT), Poland** 12

* **Challenge:** WAT, a major Polish university educating over 9,000 students, was operating with outdated Enterprise Resource Planning (ERP) systems that lacked integration and scalability. This inefficiency hindered its ability to manage resources effectively and adapt to modern technological demands.
* **Solution:** Axians was selected for a large-scale project to implement a new, integrated SAP ERP system. The deployment, valued at nearly 16 million PLN, includes a wide range of modules (FI, CO, HR, MM, etc.) based on SAP S/4HANA and SAP Analytics Cloud for reporting. Axians' extensive experience with other Polish universities and its familiarity with military standards from work with the Polish Armaments Group were key factors in its selection.

**Customer: The Landstede Group, Netherlands** 6

* **Challenge:** An educational institution with 25,000 students and 3,000 employees across 44 locations, Landstede was burdened by an aging, complex, and sometimes unstable network. Its IT department spent excessive time and resources on operational management, detracting from its ability to focus on educational innovation.
* **Solution:** Landstede adopted Axians' Network as a Service (NaaS) offering. This service, built on Cisco Meraki technology, shifted the responsibility for network monitoring, security patching, and management to Axians. This move allowed Landstede to achieve considerable cost savings and, more importantly, freed its IT staff to assume a more strategic, steering role, working directly with teachers to implement innovative educational tools and reduce administrative burdens.

### **Healthcare**

**Customer: Imeldaziekenhuis & AZ Klina, Belgium** 6

* **Challenge:** These two Belgian hospitals faced common administrative inefficiencies, including long queues and manual processes for patient registration and data verification.
* **Solution:** Axians Belgium developed and implemented myHealthbox, an online integration application delivered via kiosks in the hospital entrance halls. The system allows patients to use their electronic identity cards to automatically register for appointments and verify their data. The solution integrates directly with the hospitals' administrative systems, automating registrations and ensuring all parties have correct, up-to-date information, thereby saving time and reducing operational costs.

## **Concluding Strategic Insights**

Axians has successfully carved out a formidable position in the European ICT services market by leveraging a unique combination of financial strength, deep vertical specialization, and a flexible, decentralized operating model.

**Key Competitive Strengths:**

* **The VINCI Moat:** The backing of VINCI Energies provides more than just capital; it offers a strategic moat. This relationship grants Axians the stability for long-term R&D, the credibility to undertake massive, multi-year digital transformation projects, and privileged access to critical infrastructure sectors where VINCI is already a dominant player.
* **Deep Verticalization:** Axians' "network of specialists" model is a powerful differentiator. Rather than offering generic IT services, it has cultivated deep, demonstrable expertise in complex verticals. Entities like Axians Infoma in the German public sector are not just vendors but embedded partners with decades of domain-specific knowledge, creating high barriers to entry for competitors.
* **High-Value Solution Focus:** The company consistently positions itself as a strategic partner, not a commodity "box mover".27 Its portfolio is centered on complex implementations of enterprise-grade platforms from partners like SAP and Cisco. This focus on high-value, transformative projects leads to sticky, long-term customer relationships and a business model based on recurring services and strategic consulting rather than one-off sales.

**Potential Challenges and Strategic Responses:**

* **Brand Cohesion:** A key risk of the decentralized model is brand fragmentation, where the value of the overarching Axians brand could be diluted by its many specialized sub-brands. The company is actively mitigating this through strategic initiatives that create a more unified identity. The establishment of the international SOC in Switzerland is a prime example of centralizing expertise under the Axians banner to deliver a consistent, high-value service across borders.19 The rebranding of acquired companies like S&T to Axians further reinforces this goal.2
* **Geographic Concentration:** The current customer portfolio shows a heavy reliance on the European market. While this represents a position of strength, it is also a concentration risk. The stated presence in North America appears nascent based on publicly available customer evidence.29 This region represents a key area for future growth and strategic diversification to balance its European focus.

Future Outlook:

Axians is on a clear trajectory of continued expansion. This growth will likely be driven by further strategic acquisitions designed to deepen both its technological capabilities—particularly in high-demand areas like cloud, AI, and cybersecurity—and its geographic reach into new markets like North America and further into Central and Eastern Europe.

The company is also demonstrably moving up the technology value chain. Early projects focused on network and infrastructure integration are now complemented by sophisticated engagements in data-driven decision-making and AI-powered process optimization, as evidenced by the work with **Panike** and **Frutura**.20 Finally, the strong emphasis on sustainability and the energy transition, inherited from its parent VINCI, is poised to become a significant differentiator. This positions Axians not just as an ICT provider, but as a key enabler of the digital solutions required for a more sustainable global economy.

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