Capgemini

Future-proofing Supply Chain Management: **Building Resilience** and **Agility through** Digital Transformation

Future-proofing the supply chain – towards the Frictionless Enterprise

At work or at home, we click to confirm an order, and within the week – sometimes, even sooner – our purchase arrives at our loading bays, or on our doorsteps. It's like driving a car: we step on a pedal, and something responds. We don't question how, because we don't need to. It just does.

Anyone working in the supply chain knows just how much effort is involved in making these things happen. Yes, it ought to be the simple, straightforward process it appears to be from the outside. Yes, the system ought to be able to surf the peaks and troughs of supply and demand, and still deliver – figuratively, and literally. But frequently, it's a process that's built on compromise, on legacy routines, on workarounds – and to some degree, indeed, also on guesswork, and on optimism.

And it all works fine. Until a time comes – a time no one could have foretold – when it struggles to cope. A time like the COVID-19 pandemic.

In this study, Everest Group and Capgemini have explored the impact of COVID-19 on global supply chains, considering the prerequisites for a model that can be sufficiently robust and flexible to meet this and other challenges. Key to the model outlined by Everest is the principle of digital transformation, which is itself at the heart of our frictionless enterprise concept. The study also examines the role service providers can play in helping organizations to achieve the sturdiness and adaptability their supply chains need.

At Capgemini, we're committed to helping organizations meet their own needs not just now, but in the future; and not just the future that might be expected, but the one no one can see. It's what we call the Frictionless Enterprise – a model for an organization in which information can flow seamlessly between people and processes, intelligently, and as and when it is needed.

The five fundamentals on which the Frictionless Enterprise is built are – hyperscale automation, cloud agility, data fluidity, sustainable planet, and secure business. There is, perhaps, no better place in an organization to apply this kind of thinking than in the supply chain.

With a frictionless digital environment, and with the experience and advice of seasoned service partners, enterprises can ensure that when they and their customers step on that pedal, everything will respond as it should – no matter how unprecedented the circumstances may be.

Jörg Junghanns
Vice President Europe – Digital SupplyChain,
Capgemini's Business Services

Everest Group®
RESEARCH

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Shirley Hung, Vice President
Vignesh Kannan, Practice Director
Bhanushee Malhotra, Senior Analyst
Amir Khan, Analyst

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Introduction

The pandemic has caused disruptions to global supply chains on an unprecedented scale. Organizations faced multiple challenges concurrently: supply discontinuity due to lockdown restrictions, overstocked warehouses due to regulatory changes, production disruptions due to workforce safety concerns, sudden declines in demand for some sectors, and steep shifts in buying patterns.

When the crisis struck, some businesses were already prepared to deal with the impact, having incorporated lessons from previous supply chain shocks into their Supply Chain Management (SCM) practices; many were not prepared. However, the pandemic has made clear that uncertainties and disruptions are likely to become more frequent in SCM, and the challenge for organizations is not merely to mitigate risk, but to future-proof their supply chains.

A future-proofed supply chain incorporates some key characteristics such as resilience and agility, and digital technologies also play a critical role: organizations can leverage digital technologies to enable end-to-end visibility, dynamic operations, and process integration to future-proof SCM. Further, they can accelerate their achievement of future-proofed SCM by working with third-party providers.

In this paper, we explore the following topics related to organizational preparedness in SCM:

- The impact of COVID-19 on global supply chains and emerging changes in business models
- Key characteristics of a future-proofed supply chain
- The role of digital transformation in future-proofing supply chains and an approach to successful digital transformation
- The role of service providers in driving digital transformation and the associated benefits

The impact of COVID-19 on global supply chains and emerging changes in business models

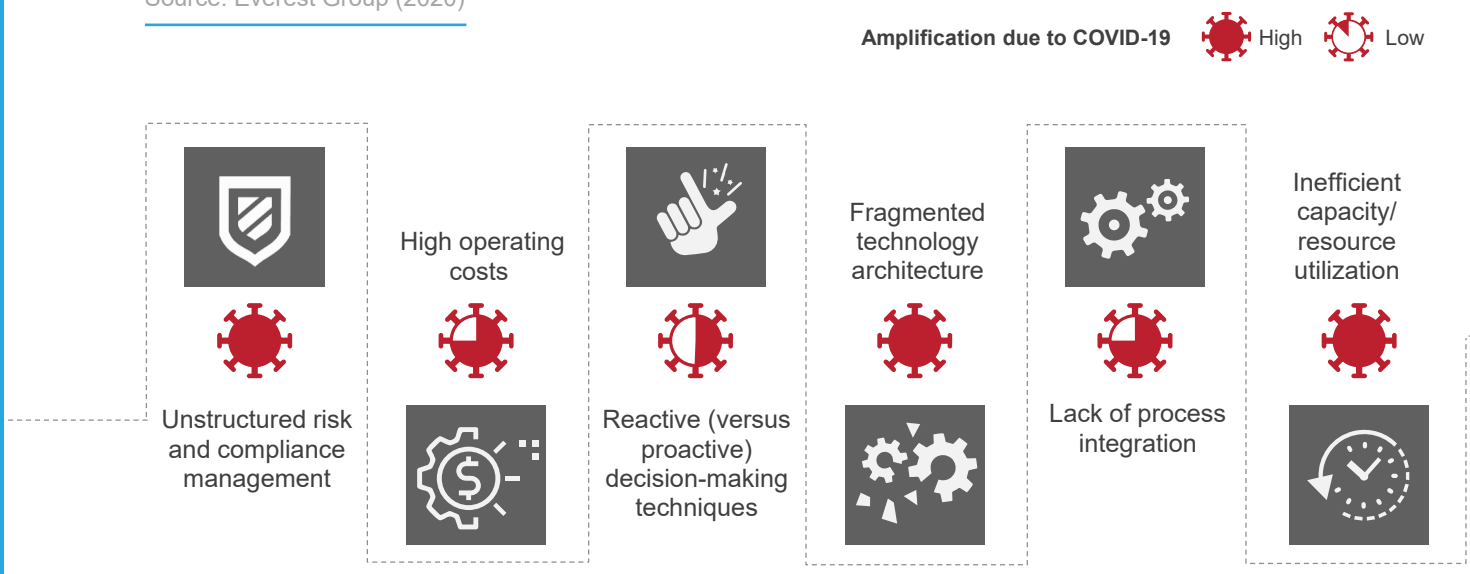
The COVID-19 pandemic has disrupted supply chains around the globe by stalling of production and logistics operations, creating demand surges or declines in goods and services, and increasing cybersecurity threats given the necessary shift to remote delivery models.

These challenges have amplified the impact of underlying shortcomings in traditional SCM practices, such as inefficient capacity/resource planning and operational silos, that prevent effective disruption management, as shown in Exhibit 1.

EXHIBIT 1

Supply chain shortcomings that were amplified by the pandemic

Source: Everest Group (2020)



The need for paradigm shifts in SCM

As the pandemic unfolds further, organizations are increasingly focused on addressing supply chain shortcomings. According to an April 2020 Procurious survey, 73% of global procurement and supply chain leaders are planning seismic shifts to their SCM and procurement strategies in light of the pandemic. The crisis is dramatically impacting significant portions of businesses, forcing them to redesign existing SCM practices. For instance, organizations are downsizing their office leases and investing in video conferencing and pay-per-use office equipment to support the remote working model. Similarly, many industries are revamping their business models to enable improved outcomes such as shorter transportation cycles, extended supply base, digitalized processes, optimized inventory levels, and expanded product/service lines to generate additional sources of revenue during the pandemic.

For instance, grocery stores in the US, such as Kroger and Whole Foods, converted their retail stores into order fulfillment centers that allowed grocers to pick up and deliver orders faster than from fulfillment centers that were far away from customers. This reduced delivery time and drove more efficient resource utilization.[1] Another case in point is Foxconn (the manufacturer of iPhones for Apple), which shifted some its production to produce face masks on a large scale for its own staff and to meet the soaring global demand.[2]

While business models are changing rapidly, the level of change varies significantly across industries and depends on the amount of disruption each faces. Manufacturing and travel, for example, are highly disrupted, and thus compelled to make significant changes in their business models, while telecom has been relatively less affected outside of needing to focus on specific areas such as managing the demand spike brought about by the move to remote working and managing the increased need for IT-related investments, especially in security.

Three emerging SCM themes are governing business model changes – risk management, demand management, and cost optimization / operational efficiency – as discussed in Exhibit 2.

About **44% of CEOs plan to shrink global supply chains** and rely more on local suppliers; 17% plan to increase inventory levels in light of the pandemic. Only a quarter of respondents are planning to stay the course and not make sizeable changes.

– Survey conducted by Procurious, April 2020

1 10 Examples Of How COVID-19 Forced Business Transformation – Forbes.com
2 The Guardian press release dated February 2020

EXHIBIT 2

Changing practices due to COVID-19

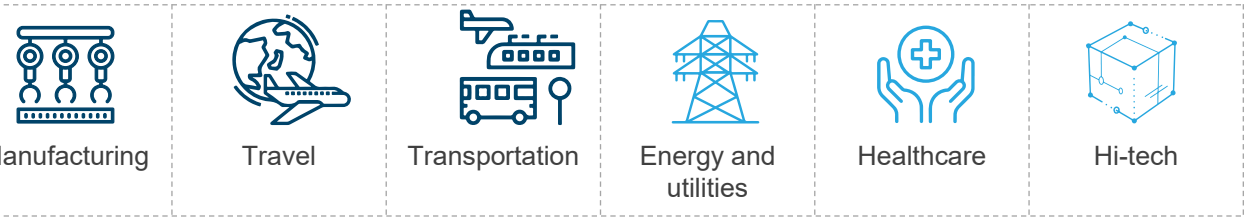
Source: Everest Group (2020)

RISK MANAGEMENT

Organizational practices before COVID-19	Changing practices due to COVID-19
• Supplier risk evaluations of tier-1 suppliers at the time of onboarding • Trigger-induced mitigation strategies • Visibility into tier-1 suppliers' financial and operational viability, with annual or semi-annual reviews of the supplier network • Existence of standard Business Continuity Planning (BCP) with mostly event-triggered revisions	• Use of risk management tools that continually and proactively evaluate risk • Ongoing risk evaluation of the extended supply chain network including tier-2 and tier-3 suppliers • Activation of BCP to secure critical inventories and activate alternate suppliers when needed • Redevelopment and upgrading of BCP to support ongoing and anticipated disruptions

Key industries

Degree of change: High Moderate Low



DEMAND MANAGEMENT

Organizational practices before COVID-19	Changing practices due to COVID-19
• Strategies to enable just-in-time manufacturing through ongoing evaluation of high demand products and according alignment of production • Utilization of historical data/trends to forecast future demand • Reactive decision-making – wait and see approach	• Extensive use of predictive analytics and Machine Learning (ML) to turn data into insights to predict rapidly fluctuating demand • Rebalancing of supply chains based on current demand situations (e.g., production of essential items during the pandemic) • Building adaptability to change by sensing of market parameters and signals at various points of the supply chain • Enabling inventory movements to accommodate short-cycle demand shifts • Focus on production agility to support rapid replanning and re-scheduling

Key industries

Degree of change: High Moderate Low

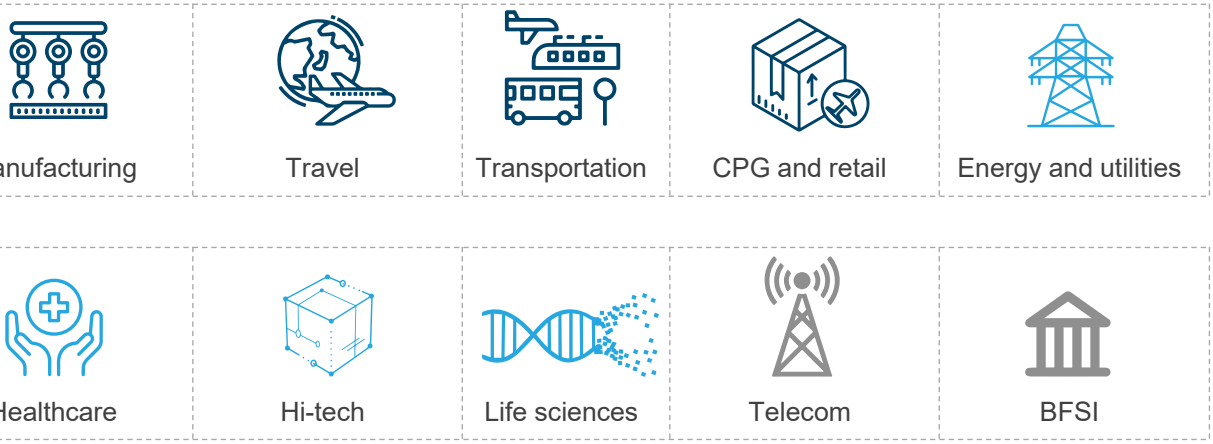
EXHIBIT 2 (continued)
Changing practices due to COVID-19
Source: Everest Group (2020)

COST OPTIMIZATION / OPERATIONAL EFFICIENCY

Organizational practices before COVID-19	Changing practices due to COVID-19
• Cost savings and operational efficiency considered the domain of procurement and supply chain managers, not the organization as a whole • Function-specific utilization of resources, with limited evaluation of overall utilization and productivity • Existence of a brick-and-mortar delivery model and operational office leases, with limited flexibility in workforce operations, such as work from home used in emergency situations only	• Operations re-planning and re-prioritizing given declining revenue, or through evaluation of alternate revenue sources, such as by expanding a product line into new areas • Ensuring optimum utilization of critical workers through effective talent management practices to sustain critical operations and promote a culture of well-being • Review and adjustment of the SCM operating/delivery model to harvest global talent and cost advantages • Reduction in overall time-to-market by limiting the need for manual intervention for tactical tasks through supply chain automation • Shift in delivery toward remote work by using subscription-based office spaces and procuring remote working equipment

Key industries

Degree of change: High Moderate Low



Future-proofing supply chains by building resilience and agility

Resilience and agility are key traits for supply chain success, especially in times of crisis. Successful auto racing teams represent a good analogy: they constantly monitor their team members' and equipment well-being and keep an eye out for any changes in conditions to ensure they always have a clear picture of both current and upcoming circumstances. This constant monitoring helps them anticipate issues, take calculated risks, and react quickly when unexpected events arise. By thinking this way, they not only survive these challenges, but potentially actually emerge ahead of the pack. They are able to pivot to meet challenges and use these challenges as opportunities to gain ground and improve their practices for future races.

Organizations' supply chains can use resilience and agility to achieve similar results. Resilient organizations build strong frameworks to anticipate and respond to disruptive elements and undertake proactive measures to strengthen business operations. Agile organizations ensure process flexibility– their processes adapt to changes in supply/demand, enabling them to respond quickly to market changes and crises. Such organizations integrate this flexible way of working into their day-to-day operations planning. An agile manufacturing system, for example, is able to cope with increases in product variety and shifts in product specifications due to the flexible design that is integrated into its operating model. One example of how agility helped an organization during the crisis is Dyson, a household appliances manufacturer that designed ventilators for COVID-19 patients within a short timeframe as it had the ability to rapidly reconfigure its design team and factory lines.

In building this resilience and agility, organizations need to incorporate several key characteristics, as explained in Exhibit 3.

EXHIBIT 3

Key characteristics of a resilient and agile supply chain

Source: Everest Group (2020)

Dynamic operating model
By building a strong operational framework that meets the strategic business vision and adapts quickly to the company's changing needs by ensuring flexibility/adaptability to changing environmental factors

Integrated processes
By integrating siloed processes and transforming the use of systems and technologies from piecemeal to collaborative

Transparent operations
By ensuring visibility across the supply chain and enabling smooth operations and proactive mitigation of risks through real-time information tracking

Dynamic operating model

A dynamic operating model enables a business to realize its strategic vision through effective assignment and utilization of its resources and to adjust rapidly as its vision evolves or disruptions occur. While operating model creation is the first step toward building future-proofed supply chains, ensuring the model remains dynamic through continuous innovation is the key to success.

Building a dynamic operating model involves aligning with key supplier and client stakeholders to support the execution of business-critical processes. It requires organizations to answer some fairly challenging questions:

- How should the supply chain be organized – by function or geography?
- How much hierarchy should there be across each function/geography?
- What digital tooling is required to enable processes and functions and to achieve critical levels of flexibility?
- How much of the supply chain should be offshored/nearshored?
- Should goods be held closer to the customer or in remote distribution centers?
- Should the delivery model be entirely brick and mortar, entirely remote, or a hybrid?
- What mix of talent and capabilities is required to meet strategic business goals?
- How can organizations sense changing markets early and quickly meet rapidly changing customer needs?
- How can contingency planning mitigate the effect of disruptions as they arise?
- How can organizations achieve scale and flexibility while optimizing costs?

There are many benefits to implementing a dynamic operating model with the right set of digital tools. Nearly 80% of firms that adopt a digital-native operating model say they are on their way to establishing market leadership in their respective industries and are in a better position to serve new markets and customer segments. Furthermore, firms that use a digital-native operating model have realized an average of 1.7 times greater cost savings than those that have not initiated these changes.[2] Exhibit 4 outlines the key components of a dynamic operating model.

EXHIBIT 4

Components of a dynamic operating model

Source: Everest Group (2020)

Level of priority: High Moderate Low

Strategy	Vision; Delivery model; Functional goals; Contingency planning	
Market sensitivity	Demand forecasting	Monitoring of market parameters
Talent	Capabilities	Team size
Organizational structure	Amount of hierarchy	Governance
Processes	Workflow	Cycle time
Stakeholder alignment	Communication with suppliers, customers, and regulatory bodies	Frequency of alignment with internal and external stakeholders
Digitalization	Level of digitalization (organization-wide, process-specific, multi-process)	Types of digital levers

2 Source: Everest Group survey with 200 CXOs from large enterprises with more than US$ 1 billion in revenue (2019)

Integrated processes

As supply chain managers evaluate components that result in better decision making, they need to shift from siloed processes, technologies, and systems to an integrated, customer-centric program. Process integration is not a one-time activity; it is a part of day-to-day supply chain functioning. Exhibit 5 details the best practices in process integration.

EXHIBIT 5

Best practices in process integration

Source: Everest Group (2020)

Transparent operations

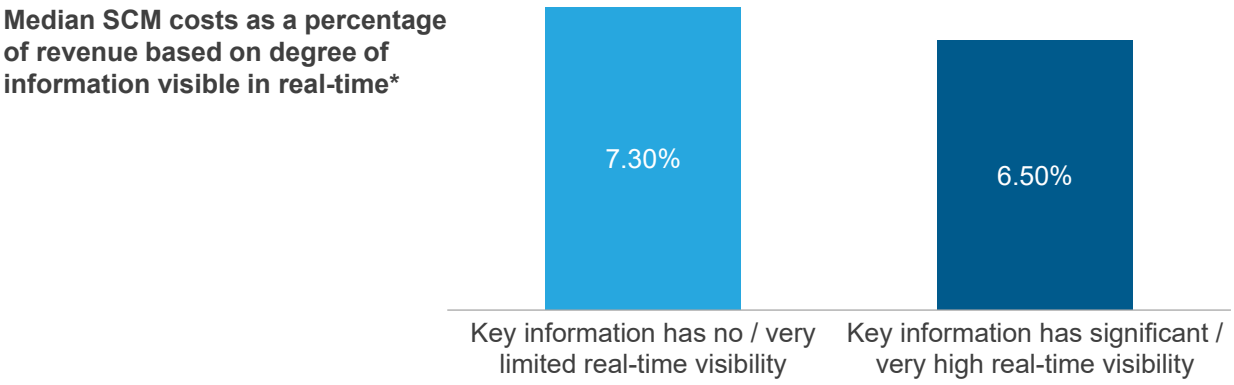
Visibility across supply chains and their risks requires real-time monitoring of the information flow to enable early detection of problems and to predict future risks. The ability to get deeper insights from supply chains is critical to improving and strengthening supply chains to quickly mitigate challenges.

The average difference in supply chain management costs between organizations that have real-time data visibility to a significant / very great extent and those with little or no visibility is 0.8% of revenue; that's a $40 million difference for an organization with $5 billion in revenue. Companies incur millions of dollars in costs due to order delays and inventory stockouts, issues that lead to a ripple effect of multiplying costs throughout the supply chain. Costs can be significantly reduced by increasing real-time visibility. Improved visibility leads to more efficient order management through customer-sensing demand forecasts and reduced stockout situations through data-driven inventory management. Exhibit 6 demonstrates the impact of incorporating real-time visibility on SCM costs.

EXHIBIT 6

Impact of incorporating real-time visibility on SCM costs

Source: APQC (2020)



Real-time visibility also positively impacts customer order cycle times. It is essential to achieving a perfect on time and in full delivery record, as it provides accuracy in data-driven forecasts across warehouses and distribution centers. This helps companies maintain inventory levels based on customer demand, eventually speeding order fulfillment and shortening order cycle times. Order cycle times are also quicker with real-time visibility as supply chain professionals can make decisions more quickly to address changes in demand/supply. The average difference in customer order cycle times between organizations that have real-time data visibility to a significant / very great extent and those with little or no visibility is 4.5 days; that's a difference of 36%. This difference is significant as customers' expectations for faster delivery continue to rise.

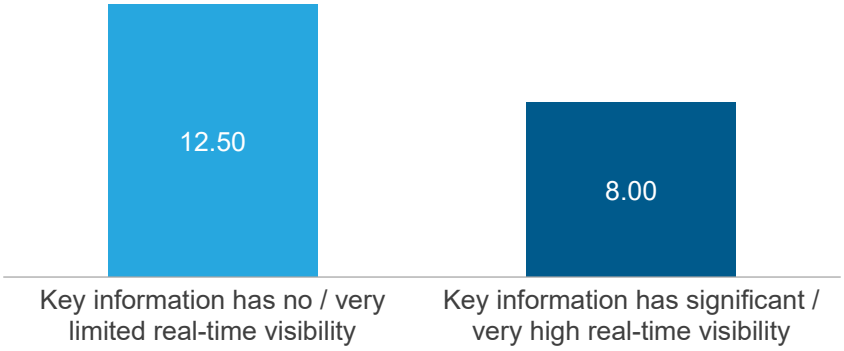
* Note: APQC defines total supply chain management costs as the sum of the costs associated with the processes to engage in supply chain planning, procurement, logistics, and reverse logistics. This includes supply chain IT costs, finance and planning costs, inventory carrying costs, material acquisition costs, order management costs, and returns management costs

EXHIBIT 7

Impact of incorporating real-time visibility on order cycle time

Source: APQC (2020)

Median customer order cycle time (in days) based on degree of information visible in real-time



The role of digital transformation in driving more effective and future-proofed supply chains

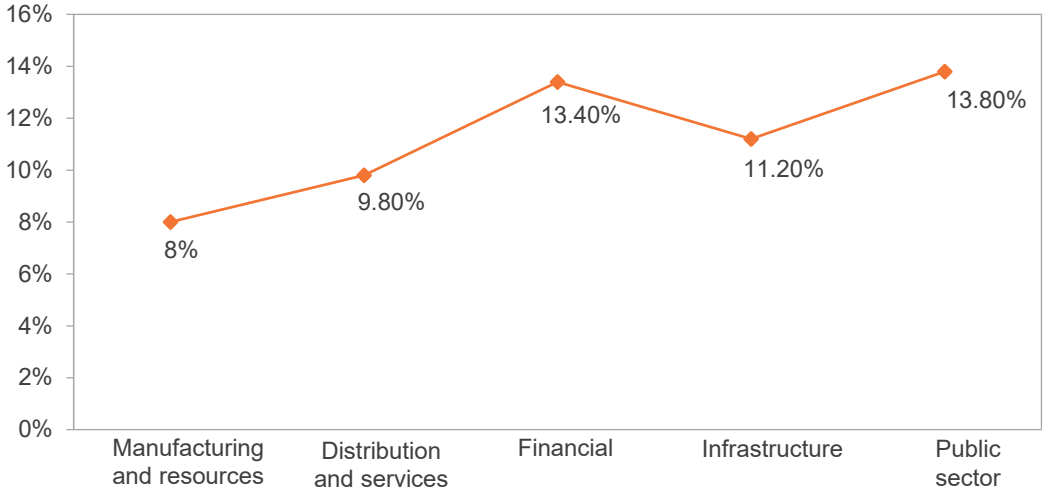
Prevailing uncertainties and evolving business needs are prompting companies to accelerate their supply chain digital transformation journeys immediately. According to an April 2020 quick poll conducted by Everest Group across organizational leaders, 48% of respondents are putting in significant efforts to implement new technologies such as automation and analytics to prepare for the next normal. According to Statista, worldwide spending on digital transformation technologies and services is expected to increase by 10.4% in 2020 to US$1.3 trillion despite long-term revenue losses in the overall economy.

EXHIBIT 8

Digital transformation spending 2020 growth forecast post-COVID-19

Source: Statista (2020)

Growth rate by industry
2020; % growth



The post-COVID-19 growth rate forecast is positive and digital transformation spending is expected to increase by 10.4% in 2020 despite long-term revenue losses in the overall economy, as organizations are seeking to increase operational efficiency and transform existing business processes through digital transformation technologies and services

Moving toward a more resilient and agile SCM requires getting a firm grasp on each subprocess, such as ensuring order management is efficient, inventory is available when and where required, and transportation is scheduled in a timely and effective manner. These activities can benefit significantly from digital transformation, evidence of which can be observed by evaluating the impact of digital tools on key supply chain metrics.

For instance, the use of automation tools such as hand-held terminals and scanning devices, such as RFID and barcode scanners in sales orders, eliminates data entry errors that can lead to inaccurate orders and shipping delays. According to APQC research, the effect of implementing sales order process automation alone on overall profitability of the organization is 0.3%.

Typically, companies that use digital tools have better performance across supply chain metrics such as perfect order performance, cash-to-cash cycle time, and demand forecast accuracy. This is because digital tools help provide more accurate and timely information around inventory and demand levels, enable automation of tactical tasks, and provide predictive warnings of transportation network disruptions. These benefits improve internal supply chain performance, eventually impacting key financial value drivers such as SCM costs and operating margins. Achieving perfect order performance also impacts revenue, as customers receive orders on time and in accordance with their requirements, thereby reducing returns.

Overall, companies that successfully implement a digital supply chain are likely to reduce costs by an average of 20% while increasing revenue by 10%.[1]

While digital transformation is the key accelerator to future-proofing SCM, lack of coordination among digital levers can lead to missed opportunities and slow reactions to disruptions. Thus, operational dashboards and digital orchestration are instrumental in driving transformation. Synchronization among digital levers can help assimilate various supply chain functions and enable organizations to amplify digital transformation benefits through end-to-end visibility, increased operational efficiency, and better risk management.

However, many organizations' digital transformation initiatives are unsuccessful because they fail to realize that the right approach to digitizing supply chains integrates suitable technologies with revamped operations. A holistic approach to SCM can help overcome this challenge, by transforming processes to drive operational efficiencies along with improving digital maturity across the SCM value chain.

Organizations need to consider many elements to undertake successful digital transformation: digital enablement, operational revamp, organizational alignment, and continuous innovation, as depicted in Exhibit 9.

By 2023, spending on the technologies and services that enable digital transformation is expected to reach **US$2.3 trillion**.

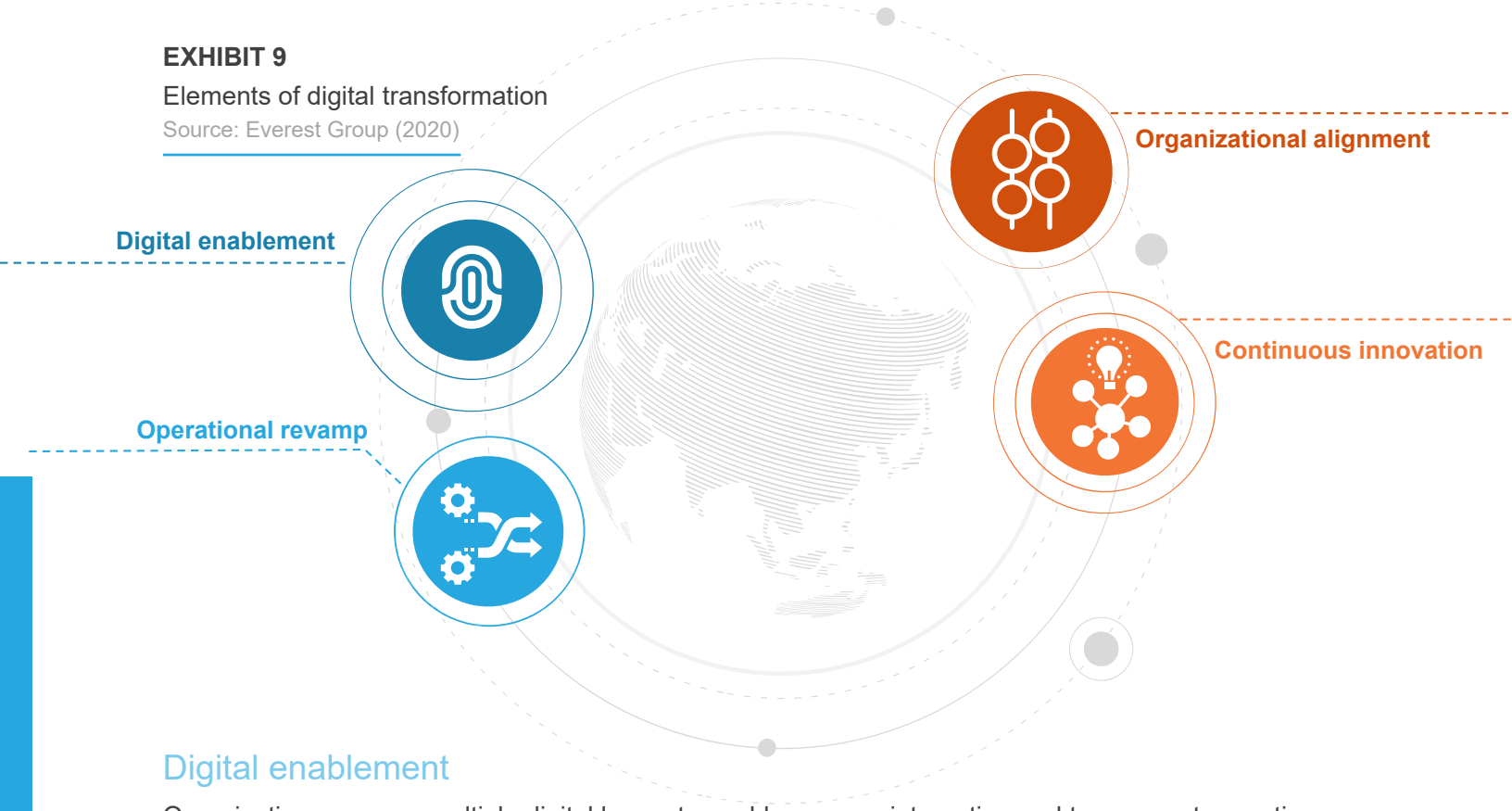
– Statista, 2020

1 Digital Supply Chain Transformation Guide: Essential Metrics; Digital Supply Chain Institute (2017)

EXHIBIT 9

Elements of digital transformation

Source: Everest Group (2020)



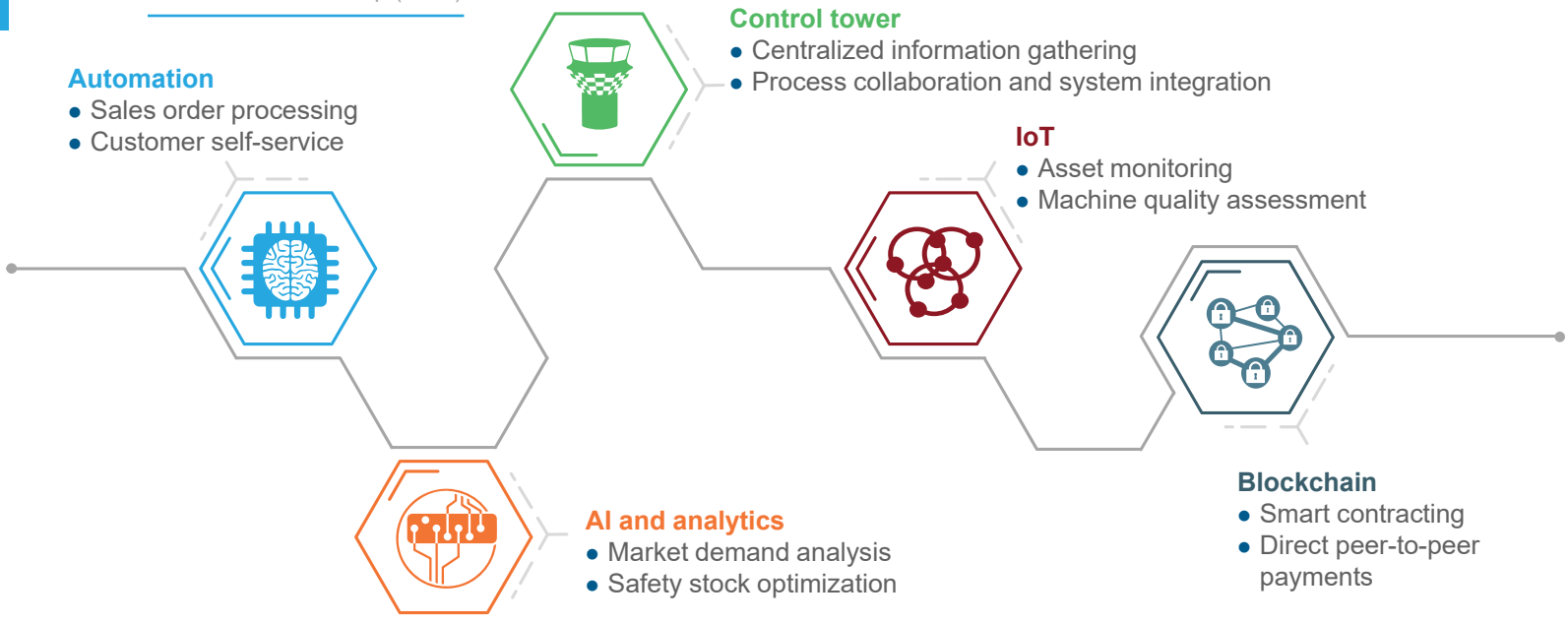
Digital enablement

Organizations can use multiple digital levers to enable process integration and transparent operations. Use of digital levers across processes can help these organizations realize the benefits of SCM transformation, such as through the use of automation to manage sales orders and process invoices, IoT to monitor field assets in real-time, and blockchain to enable smart contracting (automatic execution of contracts when certain pre-conditions are met).

EXHIBIT 10

Levers that help improve digital maturity

Source: Everest Group (2020)



Operational revamp

Firms that are unable to manage disruptions and meet changing market demands – for example, an international firm unable to meet supply/demand volatility during the pandemic despite having digitalized processes because decentralized teams and non-integrated processes slowed decision-making – need to accelerate their operating model maturity. For them, achieving a future-proofed supply chain requires rethinking components of their operating model to achieve their supply chain goals including existing talent and capabilities, organizational structure, and process workflow. Achieving operating model maturity incorporates building an understanding of industry best practices pertaining to people/technology integration with the aim of customer delight and ease of execution.

Organizational alignment

Harvard Business Review polled 799 company executives from various industries worldwide and discovered that organizational silos was the top barrier to digital transformation. Inconsistent understanding among stakeholders and leadership is a major cause of failure as employees are not invested in driving the digital transformation agenda when they are unaware of its purpose and importance. A robust strategy is built on a shared purpose and vision, which leadership needs to communicate to all employees. It is only then that change agents can accelerate digital transformation.

Continuous innovation

Innovation is the only way businesses can go beyond meeting existing business needs to address changing business needs. Driving major transformation efforts is not a one-off event; rather it requires constant injection of new ideas and evaluation of multiple iterations to find an optimal approach. Change management is an ongoing process, and in today's environment, ensuring development of a firm-wide flexible culture that responds rapidly to changing business/environmental needs is paramount.

The role of service providers in driving digital transformation in SCM

Before the pandemic, supply chain managers undertook basic in-house SCM services transformation through partnerships with supply chain advisors and third-party technology vendors. They assessed their current states, identified gaps, and developed transformation roadmaps for their supply chains, while obtaining digital tools from technology vendors to digitalize specific processes. In some cases, supply chain leaders collaborated with service providers in the early stages of supply chain transformation, driving achievement of bespoke levels of supply chain agility/flexibility. These transformations were key to helping these organizations to mitigate the impact of COVID-19.

As we anticipate the need for ever-shorter timeframes and more flexibility, outsourcing key SCM processes is an increasingly important part of the strategy to accelerate an organization's digital transformation. Exhibit 11 outlines the benefits of partnering with an outsourcing provider.

EXHIBIT 11

Benefits of partnering with an outsourcing provider

Source: Everest Group (2020)

An outsourcing partner's role can be broad, such as driving the end-to-end transformation of a SCM value chain, or niche, such as digitalizing a specific SCM process or helping connect the dots in a non-integrated SCM process and technology environment. There is a wide variety of SCM service provider types, with a wide variety of offerings to serve different needs. They combine standalone technology solutions, such as logistics control tower and process automation, with consulting-led solutions, such as supply/demand planning, to provide holistic business outcome based-solutions. These solutions provide end-to-end operational benefits as service providers lead the entire digital transformation.

Some providers also offer specific solutions based on organizational need, such as supply chain data management tools that provide end-to-end supplier network visibility. These types of tools, along with end-to-end operational solutions, have been gaining traction throughout the pandemic, as organizations seek to completely redesign their business models.

However, organizations must evaluate their internal needs and align these needs with their outsourcing partners to derive maximum value from their relationships. A one-size-fits-all approach does not work in outsourcing partner selection; organizations must select the best-fit provider based on their unique requirements and after thorough evaluation of the potential provider options. In selecting the best-fit partner, several considerations are key:

- **Cultural and leadership alignment**
  Cultural alignment and stakeholder buy-in are key to reducing fear of change and building trust in the partnership
- **Governance**
  Strong governance structures, with regular meetings consisting of leadership from the organization and service partners to review performance and discuss any issues, help in deriving value beyond

traditional parameters such as cost savings and risk mitigation, such as benefits from supplier-driven innovation

- **Funding**
  During the crisis, capital optimization is a high priority. Having all the stakeholders on board and developing a clear understanding of critical decisions such as level of digital tooling, legacy modernization, and extent of operations control/monitoring required strengthens the relationship among a company and its partners
- **Current technology maturity**
  A clear understanding of the maturity of the organization's technology solutions helps in defining the partnership's short- and long-term goals, making it easier to develop and sustain the transformation effort

The pandemic is forcing organizations to re-examine existing relationships and consider new partnerships to future-proof their SCM.

Conclusion

While the impact of COVID-19 has been unprecedented, it is clearly not the last crisis we will have to endure. The pandemic has demonstrated only too clearly that we need to continue to strengthen our supply chains to prepare for the inevitable uncertainties that lie ahead. The only way to be better prepared is develop processes, systems, and structures that enable rapid adaptation and resilience in the face of disruptions. Although each organization is unique, with different levels of process and technology maturity, all can benefit from partnering with service providers to leverage their capabilities and accelerate their transformation to future-proof their supply chains. Many organizations have already benefitted from such partnerships at the onset of COVID-19 as service providers undertook transformational initiatives for them. Examples include ensuring core infrastructure support to facilitate remote working, implementing tele-sales modules to enhance an omnichannel sales platform, and accelerating the end-to-end digital transformation journey to ensure continuity of business-critical processes; or simply keeping up supply chain operations by the provisioning of undisrupted supply chain services.

In their quest to tap into a tech-savvy, digitally adept consumer base, organizations tend to forget that driving a digital transformation strategy is a continuous process. To realize the full value of their modernization efforts, their transformation strategy should incorporate all the right elements – including necessary partnerships, adequate leadership support, and continuous innovation. Firms that adopt a carefully calibrated approach with regular feedback and improvements stand to gain competitive advantage by building resiliency and agility through digital transformation.

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For more information about Everest Group, please contact:

+1-214-451-3000
info@everestgrp.com

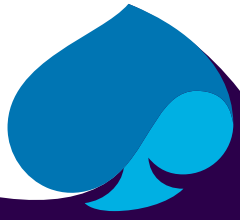
For more information about this topic please contact the author(s):

Shirley Hung, Vice President
shirley.hung@everestgrp.com

Vignesh Kannan, Practice Director
vignesh.k@everestgrp.com

Bhanushee Malhotra, Senior Analyst
bhanushee.malhotra@everestgrp.com

Amir Khan, Analyst
amir.khan@everestgrp.com



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businessservices.global@capgemini.com

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