HCM Cloud Watch 2020

Capgemini Invent, Netherlands September 2020





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The aim of this study is to provide insights on the market trends, cloud adoption and vendors for HCM Cloud

Context - Background, Scope, Objective and Approach

BACKGROUND

- Capgemini Invent NL has developed a Human Capital Management (HCM) Cloud Watch to understand its global HR market, level of SaaS adoption, emerging technologies and key digital initiatives within the HCM Cloud
- Capgemini Invent India is collaborating with Capgemini Invent NL in understanding the current market trends of HCM Cloud and identifying the key vendors providing HCM solutions

OBJECTIVE



- Provide a detailed overview of the HCM Cloud market including key market trends and overall market growth
- Provide information on the leading HR Cloud solution providers across the globe
- Identify leading players across HRM Cloud functionalities

SCOPE

- Geographic Scope: Europe
- Study focuses on:
 - Overview of various HCM trends
 - Detailed analysis on HCM Cloud vendors in the market
- Vendor profiles:
 - Vendor profiles of leading players in HRM Cloud functionalities

OUTCOMES

- Overview of the latest Cloud HCM trends
- Major vendors in HCM Cloud market and their profiles
- Assessment of the vendors on SaaS and mobile functionalities

Sources: Capgemini Invent Analysis

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Companies are leveraging HCM and its features via deploying SaaS based Cloud, and using AI and analytics



Sources: Capgemini Invent Analysis

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We have assessed the vendors using categorization of HCM features

HCM Cloud Solution Feature Overview



Sources: The Forrester Wave: SaaS Human Resource Management Systems, Q3 2017

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RPA and AI are being used by companies for handling highly repetitive and data centric tasks



Chatbot along with human interaction and mobile technologies are in trend for workforce management







AI technologies assist employees to understand the benefits they are entitled for and leverage it



Machine Learning and AI assist companies to recruit and 🥏 onboard the right candidates seamlessly

1. HRM Core Functions | 2. Workforce Management | 3. Compensation | 4. Recruitment and Onboarding | 5. Performance and Talent | 6. Learning and Development | 7. Employee Engagement | 8. HRMS Platform



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Predictive analytics aids companies to manage talent and AI allows employees to explore career growth options



Gamification and VR are being used by companies for training their employees in more engaging manner





Wearable technology keeps a track on employee's health and chatbots resolve employee queries in real time



Employee Experience can be improved by providing Digital Tools to employees for managing their careers





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AI, machine learning and HR analytics are the key trends within HCM Cloud Market

HCM Cloud Market Trend Highlights - 2020



Emerging tech like AI, VR, Chatbots are significantly transforming HR processes





Continued growth of AI

- The application of AI in HR is growing rapidly on account of
- surge in the adoption of HCM systems in organizationsAI is significantly being leveraged for the hiring process
- helping to identify top candidates for a job opening



Expansion of Cloud-based HCM tools

- Many companies are expected to shift to newer Cloud-based HCM systems on account of upgrade in IT infrastructure
- Switching to a Cloud-based system will likely continue to be a top choice and priority for 2020



Employee self-service portals

- Self-service portals have become popular among employees as three fourths of full-time workers in US expect employers to provide high levels of self-service for HR tasks
- Helps save money and offers a better experience



Use of specialized HR tools

- Many organizations are opting to purchase separate systems for various HR functions rather than legacy HCM systems
- There is expected to be newer innovations in software and frequent releases for modern mobile-driven workplace



Chatbots

- Chatbots are expected to be on rise on account of surge in self-service portals
- Chatbots can help quickly resolve issues and provide answers instead of waiting for a phone call or email



Virtual and remote work technologies

- Many companies are expanding the use of remote workers which is expected to increase the investment in technologies
- Video conferencing and use of other collaboration tools are likely to be on rise on account of remote working



Increased use of Virtual Reality

- VR would help the candidate to get a better understanding of the organization and its work environment
- An AR/VR-based application can scan the candidate's face and show all key details during an interview process



New wellness technologies

- Most employees expect their companies to offer wellness benefits
- Newer apps to help with fitness goals and virtual access to mental health professionals are set to be in trend

Sources: Talentlyft; TCS

The growth in HCM market is driven by increased usage of digital platforms and tools by employees

HCM Market Overview

Global HCM Software Market Landscape



The key factor driving the growth of global human capital management (HCM) software market is increasing industrialization leading to surge in manpower that requires for human resource management using the IT, digital platforms & digitalization

- Technologies like AI, ML, Block chain, Cloud based software are being used for the daily accessing of human behavior
- North America is expected to dominate the global HCM software market on account of growth in IT services with technological advancement using IoT, Cloud based platforms, AI followed by Europe
- Europe is expected to witness a significant growth due to rising adoption of advanced technology and consumer spending

Significant number of companies are using best of breed solutions, on account of improved employee experience forming better interaction with employees as well as better analytics or automation features as compared to the big vendors

| | Future State | of HCM Landscape | | |
|--|--|--|----------------------------------|--|
| Strategic HCM | Investments | • • | Tactical Inv | estment in HCM |
| Localized HCM Technology investments IHRSD* solutions centralize common administrative HR processes BI solution aggregates data from multiple systems for consolidated reporting and analytics Business units and local entities select TM, payroll and WFM tools Light Cloud core HR app for single version of truth across entities, sometimes as part of global TM suite | Scalable and Strategic investments Cloud HCM Suite supports core HR and most TM suites AI applied in many functions to augment decision support and UX Enterprise WFM solutions meet industry requirements and include labor analytics HR shared service deployments are common and enabled by IHRSD solutions | of H Payroll/ benef RPA is utilized HR service de Administratior manager self- enabled Investments i | ed Administration R processes | Minimal Automation to manage HR processes Light Cloud HCM Suite covering most essential functionality or continued use of on-premises HRMS Continued mix of payroll outsourcing and internally hosted payroll Stand-alone basic WFM, together with scheduling for some industries |

Sources: Marketwatch; Gartner (2019-2021 Strategic Roadmap for HCM Technology Investments) Notes: HRIT (HR information technology); IHRSD (Integrated HR service delivery); WFM (Workforce management); TM (Talent management)

AI technologies are significantly being deployed in areas 🥏 of remote working, decision making and training

Global HCM Software Deployment Market Landscape

Market Trends

HCM Market Overview





- SaaS will be the dominant mode of HCM software delivery for large organizations in North America, moving from 45% of the market in 2016 to more than 60% by 2020
- On-premises-based HCM software will still account for about two-thirds of the market in emerging markets through 2020
- By 2020, on-premises HCM systems will have an average life span of 7-9 years and will be replaced by or upgraded to new technology
- Technology that will replace on-premises are in-memory technology, big data, IoT capabilities, machine learning and artificial intelligence





AI and Machine Learning based application

- AI-based recruiting to focus on eliminating bias to build inclusivity
- Online on-demand AI-enabled platforms to enable remote work
- Improved and agile processes driven by AI to elevate the employee experience
- Continuous performance management with AI
- AI-powered on-the-job simulated training tailored to specific needs
- Human and AI collaboration for better decisions
- AI-dependent data and risk management for Cloud-hosted systems
- AI to be used to create a culture of wellbeing and happiness at work
- Machine learning tools to help HR and management personnel in applicant tracking and assessment
- Machine Learning based individual skills management and performance development platform

Robotics and autonomous agents

- The quality of conversational chatbots are predicted to get better at mimicking actual human conversation
- Chatbots are offering employees instant access to the right data, making HCM portals systems productive enhancing and self-service portals
- Automated video-based interviewing is another area redefining the traditional talent pool management functionalities

Sources: Hrtechnologist; Netscribes; Emerj

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There is a continued increase in adoption across each category by size, in all HR technology category

Trends in HCM Cloud Adoption Processes

HCM Cloud Adoption Processes (n = 1,892 respondents)



Gen Z being from the digital background prefers face-to- 🤝 face interaction over electronic tools

Employment Conditions for NextGen Workforce



- interactions As per a study report 53% of Gen Z-ers prefer in-person communication over electronic tools
- will always look for a challenging business environment and more gamified incentive system
- develop their skills or acquire new ones
- Therefore, employers needs to think about mentorship which will always come before financial reward for a gen Z employee
- employees are internet savvy and well accustomed to messaging platforms
- Employers needs to create initiatives that leverage the collective digital intelligence of Gen Z graduates and their natural attraction for the digital realm
- reconsider employee evaluation system to accommodate the formal, annual appraisal one-onone sessions with ongoing, informal reviews SuccessFactors, an
- HRM system rolled out feedback from employers to engage with Millennial and Gen Z workers

 Gen Z are interested in a hybrid approach to work i.e. time split between home and workplace

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Oracle, SAP SuccessFactors and Workday provide almost 🥏 all HR functionalities in the Cloud

Summary of HR Solution Vendor profiles



Sources: Capgemini Invent Analysis

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We have rated the vendors using categorization of HCM features

Vendor Deep Dive - HCM Cloud Solution Feature Overview



Sources: The Forrester Wave: SaaS Human Resource Management Systems, Q3 2017

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Oracle Cloud HCM provides solution from hire to retire including talent and workforce management

Oracle Profile (1/2)



| Company Overview | | | | | | | | |
|--|--|--|--|---|--|--|--|--|
| CompanyOracle CorporationHCM Solutions ServicesConsulting, Implementation, maintenance and support | | | Oracle Cloud HCM is a solution connecting every human resource process from hire to retire including global HR, talent management, workforce management, and payroll It's also the most connected solution across the enterprise, with one Cloud unifying HCM across finance, supply chain, and customer experience | | | | | |
| Sector Focus Annual Revenue | Diversified customer segment \$39.5 Bn (FY19) | | nem across mance, supply | | | | | |
| Oracle has prov customers in ov 8 of the top 10 | 1,36,000 (2019) mented markets ided HRMS solutions to 14,000 er 140 countries whereof: Fortune 500 companies 0 innovative companies | The security approa Role-based acce Function security Data security | cccess controlthat integrates HCM Cloud and ERP, future integration of mobile connectivity, IoT and human based processesioning and identity managementIt also integrates with third-party application | | | | | |
| BIAS avanttic | | | d Resellers | Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure Image: Second structure | | | | |

Sources: Oracle Fusion HCM; Oracle Fact Sheet; Oracle Website; Partner-finder

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Oracle is exploring capabilities to leverage connected data enabling multi-device experience Oracle Profile (2/2)

Future Strategies



- Oracle is exploring capabilities of leveraging connected data to provide consistent experience across devices to enables one source for HR data to improve decision-making
- Oracle is investing in tech like chatbots, AI, Machine Learning, IOT, Blockchain & voice control for HCM

Pricing Models

The Global HR module subscription is priced at per user per month basis

Strengths

 Forrester Wave Cloud Human Capital Management Suites, Q2 2020 named Oracle Cloud HCM as a leader

 Oracle's Self- Service HR for E-Business Suite App offers HR information related to approvals, taxation and benefits to managers as well as employees

Challenges



The increasing availability of Cloud and SaaS delivery models offered by Oracle and its competitors may unfavorably impact the pricing of the Cloud and license offerings

SaaS Solutions Portfolio



Sources: Oracle Website; Oracle – Press Releases; HR Lab; Oracle Annual Report; Betterbuys; Capgemini; HCM- Cloud Service; Oracle- Recruitment; Oracle-Integration Capgemini Invent 2020. All rights reserved [28

SAP SuccessFactors provides a complete suite of HXM solutions which covers entire HR spectrum

SAP Profile (1/2)

SAP SuccessFactors

| Company Overview | | | | | | | | | | |
|---|--|---|---|---|--|---|---------------------|-------------------------------|--|--|
| Company HCM Solutions Services | SuccessFactors Inc A SAP Company SaaS Provider, Implementation, Training and support | | | | SAP SuccessFactors is SaaS solution that has recently updated its HCM Suite to HXM (Human Experience Management) Suite with a focus towards people – centric experiences The SAP SuccessFactors HXM Suite is a Cloud based buman resource management. | | | | | |
| Sector Focus Annual Revenue | All sectors \$27,533 Mn (2 | | | The SAP SuccessFactors HXM Suite is a Cloud-based human resource managem software system which is organized into 4 categories such as employee experie management, Core HR and Payroll, Talent Management and HR Analytics and Workforce Planning SAP SuccessFactors has more than 6,800 customers on its Human Experience | | | | | | |
| SAP Success Far America, Latin A MENA (Middle E Payroll is native countries Used by more th | America, Europe ast and North A ly supported for nan 4,800 custo | kets nce across North , Asia Pacific and frica) about 46 mers and more | Security is inco across all phase | Mana curity system orporated from es of softward octors provide | agement (HXM) Suite stems om the bottom up are development cycle des added physical, | Integration Systems & Platforms SAP provides capability for integrating SAP | | | | |
| Capgeminia HITACHI A Agenta PARADOX O plum | | | Partienture | ice and support ners Capgemini Aspire 10 2BM/ Calligence | | ondi ican Airlin | essFactors software | BE FUTURE READY MERCADO | | |

Sources: SuccessfactorHXM; SAP Clients ; Annual Report 2019; Statista- Number of Employees; SAP Success Factor; SAP-Integration; SAP-Security;

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HXM suite posses AI based recruiting capabilities and job matching through its technology partners

SAP Profile (2/2)

Future Strategies

- The recent introduction of SAP's HXM (Human experience management solutions) focuses on employee experiences to get better business results
- HXM enhances experiences by leveraging technologies such as machine Learning based recommendations as well as embedding a chat function

Pricing Models

- Offers consumption-based model in certain regions wherein one pays each month only for the eligible services actually used
- SAP Pay-As-You-Go is currently available by invitation only
- Subscription based pricing model available with 9 different pricing tiers based on no. of users with one-year term subscription
- Contract duration is 3 or 5 years and sales partners can sell subscriptions

Strengths



Challenges



- In respect to technical product capabilities, SAP has issues associated with disparate acquired architectures, such as complex implementations, release absorption and reporting
 The core functions in the suite were heavily under construction last
- The core functions in the suite were heavily under construction last year and are only now stabilizing and becoming more mature

SaaS Solutions Portfolio



Sources: SuccessFactors Website; HR-Lab; LinkedIn-Pricing; FutureSAP; SAP- Saving Plans; SAP- Compensation; SAP- Pay Equity; SAP- Recruitment; Forrester

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SAP SuccessFactors

Workday has a large client base with companies like Target, Hewlett Packard and Sanofi

Workday Profile (1/2)



| | Company Overview | | | | | | | | | | | | |
|--|---------------------|---------------------|--|---|------------------------------------|----------------------------------|--|--|---------------------|-----------|-------------------------|-----------------|--|
| Company | Workday | | | Workday is a leader in entities | | | | terprise-class, Software-as-a-Service (SaaS) solutions for | | | | | |
| HCM Solutions Services | SaaS provider, | implementation tra | | | | | | ses, combining a lower cost of ownership prise Cloud applications for finance and human resources | | | | | |
| Sector Focus | HCM and Finar | icial Management ap | applications • Workday HCM's key produ | | | | | uct areas include HR Management, Organization | | | | | |
| Annual Revenue | \$3.6 Bn (31 Ja | n, 2020) | | | | | | rocess Management, Reporting and Analytics, Absence ion Management and Talent Optimization | | | | | |
| Employees | 10,500 (2019) | | | | | | | | | | | | |
| Imple | emented mark | cets | | Sec | urity syst | ems | | Inte | gration S | Systems & | Platforms | 5 | |
| Worldwide 2200 organizations selected Workday HCM Workday HCM Suite is operating in 200+ countries and it is available in 30 languages Medium sized businesses as well as top 50 enterprises selected Workday The security approvement of the security approvement | | | | ional Secural Secural Secural Securations of the security of the security of the security and the security of | ecurity urity rity rogram | of | Partners with companies to integrate its product, the process are - Project Plan Review Prototype Configuration Review / Integration Final Configuration Review Workday's open standard based APIs provides 100+ SOAP* or REST* based web service as well as integration with middleware platforms | | | | | n ides as | |
| | | Partner Eco | system | | | | | | Key (| Clients | | | |
| Capgemini 🌒 a | | | | Æ | IAN CICPLU | BSI 5 ⁺ dormakaba⊯ | | iofi 🍞 | Web ENGAGING AUG | edia. | Shell | Energy Bread | |
| IBM alight | BNB CrossCountry | Aptitude" | | O Hun | nanity* uňů Xact | n ⊕legion γ ΖΚΤ εσο | LEVI S | TRAUSS & CO. | Air Asia | ASML | Hewlett P Enterprise | | |

Sources: Workday Newsroom; WorkdayDatasheet; Globenewswire; Macrotrends Notes: SOAP* (Simple Object Access Protocol); REST* (Representational State Transfer)

Workday's Skill Cloud offers strong skills management features

Workday Profile (2/2)

Future Strategies

- Workday is targeting to expand in global market especially in EMEA and APAC regions
- For sales growth Workday will open offices in South Africa and Italy
- Workday is focusing on technologies like conversational computing, analytics and AI
- Focused on people experience by introducing new features of Workday Help and Workday Journeys

Pricing Models

- Workday's provide two options for payment:
- One-time payment
- Quarter Based
- Workday charges based on the number of modules and users on the platform
- Offers Workday Payroll Connector to integrate bi-directionally to any third-party payroll application

Strengths

- Workday App provides features such as administrative task management and interactive reports and dashboards
- It's uptime SLA* performance along with zero exclusions is 99.89%
- Workday offers Skills Cloud for skills management with skills count and an ontology of more than 55,000 skills giving the company an edge over its competitors in terms of recruiting, learning, workforce analytics and workforce planning

Challenges



- High competition from SAP/Success Factors and Oracle, they have established on-premise client base
- Workday's strategy is focused on direct sale only and it has lack of established reseller program
- Workday's pricing is higher than the competitors
- Payroll capabilities is lacking in supporting global payroll natively

SaaS Solutions Portfolio



Sources: Nelson Hall Report; Finances Online; Hcmtechnologyreport; Reviews; Forrester; Thirdpartypayroll *Note: SLA-Service Level Agreement

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SaaS



workday



Cornerstone OnDemand offers easy plug and play applications with pre-built integrations

Cornerstone OnDemand (CSOD) Profile (1/2)

Cornerstone OnDemand offers Cloud-based SaaS solution; it offers four types of HCM **Cornerstone OnDemand** suites such as recruiting suite, learning suite, performance suite and HR **HCM Solutions** Recruiting, learning, performance and HR administration suite administration suites The company offers implementation, integration and other consulting services to its users Diversified customer segment The company has offices in the US, the UK, France, Germany, Spain, Italy, the Netherlands, Denmark, Belgium & Luxembourg, Norway, Sweden, Finland, **Annual Revenue** \$150.1 Mn (FY20-Q1) Switzerland, Israel, South Africa, Australia & New Zealand, India, Japan, Hong Kong,

Т

Implemented markets

Approx. 3000 (2020)

 Cornerstone has presence in 192 countries More than 70 million users in 180 countries and products in over 40 languages

Company

Services

Sector Focus

Employees

| 'nρ | socurity | approach | consists | of | |
|-----|----------|----------|----------|----|--|
| ne | Security | approach | CONSISTS | 01 | |

- Comprehensive Security and Compliance
- Advanced Data Protection and Data Privacy
- Global IT Security, Privacy & Compliance Team, Cross Border

Security systems

Singapore, Mexico, Brazil and Argentina

Company Overview

Integration Systems & Platforms

 Cornerstone OnDemand easily plug-and-play with several pre-built integrations







CSOD offers smooth integration landscape and complies to GDPR standards

Cornerstone OnDemand (CSOD) Profile (2/2)

Future Strategies

- CSOD is focusing on technology by leveraging more machine learning, AI and enhanced analytics for better UX*
- CSOD is investing on innovation and enhanced features in its platform modules

Pricing Models

• Cornerstone OnDemand's pricing is based on pay per user/month

Strengths

- Cornerstone Learn App provides learning, courses, and new content based on one's interests, role and career
- It provides pure-play Cloud on a single database and single code line with no bolt-on acquisitions
- It offers smooth UX and simple integration landscape and follows GDPR* standards

Challenges

- High competition from SAP/Success Factors and Oracle since they have established on-premise client base
- Brand awareness for Core HR and HCM is less as compared to their learning and talent management capabilities
- Lack of core module and capabilities which is mostly preferred by clients from Cloud HR solutions

SaaS Solutions Portfolio



Sources: <u>NelsonHall NEAT Report</u>; <u>Finances online</u> *Note: GDPR-General Data Protection Regulation; UX-User Experience; EU-European Union

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Cornerstone











opleFluent

PeopleFluent provides an integrated talent acquisition, management and learning solution

PeopleFluent Profile (1/2)



Sources: In-Notes

PeopleFluent can be integrated with core HCM system through its Data Integration managed service solution

PeopleFluent Profile (2/2)

Future Strategies



The company is investing in enhancing their technological solutions such as video, social collaboration, and employee communication technologies within their solutions

Pricing Models

PeopleFluent offers subscription-based pricing or Quote-based plan for its talent management solutions

Strengths



- Expert implementation and onboarding with a team of consultants and certified project managers with average 8 years of experience
 Dedicated account management and global customer support
- PeopleFluent can be integrated with many core HR/HCM system through its Data Integration managed service solution
- Launched a new enterprise recruiting solution with integrated texting, video, social and mobile app collaboration

Challenges



- The system is not very intuitive, and one needs to attend training to learn now to navigate
- Involves multiple steps for posting a position

SaaS Solutions Portfolio



eopleFluent
TalentSoft offers comprehensive HR and digital learning solution for organizations of all sizes

TalentSoft Profile (1/2)

TALENTSOFT

| | | Co | mpany Overview | | | | |
|--|--|---|---|---|--|--|--|
| Company HCM Solutions Services Sector Focus Annual Revenue Employees | TalentSoft SACloud-based talent management software providerDiversified customer segment€52 Mn (2019)600 | and learning | such as recruitment softwa learning, talent review, con talent The company also offers so academy, client support ar The company has offices in | d talent management software vendor and offers solutions are, my Talentsoft, performance and competencies, mpensation, workforce planning, hub, analytics and hello ervices such as professional, technology, TalentSoft and community n France, the UK, Denmark, Switzerland, Italy, Norway, the prway, Germany, Belgium & Luxembourg, Spain, etc. | | | |
| Talent application markets of 130 Implemented in Algeria, Morocco Singapore, Mexi | emented markets on is implemented throughout countries and in 27 languages Europe, Canada, Brazil, the US, o, Mauritius, Senegal, co, Colombia and South Africa n the DACH region and 30 new in in 2019 | TalentSoft's so ISO 27001:201 | ecurity systems ftware and related services are 13 certified data centres, privacy by design | and related services are ified Integrates talent management and talent acquisition under one single window | | | |
| Consulting BearingPoir althea HF | | | Resellers | Key Clients Celio* LACOSTE & DASSAULT BOURBON SAFRAN BOURBON GROUP INANAL Grange MARCAL BOURBON LINKBYNET AIRFRANCE | | | |

Sources: TalentSoft website; Talentsoft; Integrators

TalentSoft's Cloud technology enables companies to one companies to companies their talents intuitively and assures data protection

TalentSoft Profile (2/2)

TALENTSOFT

Future Strategies

- International growth with new operations in Netherlands
- Expanding customer portfolio in France and Canada
- Targets €100 Mn in annual revenue
- Investing in HR data management and employee experience innovations
- Shift from a SaaS model to an iPaaS* model

Pricing Models

Talentsoft offers subscription-based pricing for its talent management solutions

Strengths

- Strong innovation with performance management solutions such as Continuous Conversation
- 90% of its customers are multinational
- It entered 2018 with a revenue backlog of € 75mn as a result of existing contracts, and benefits from strong financial stability
- Selected in the Europe's Top 50 Most Promising Startups by GP Bullhound in June 2019

Challenges

- Software alternatives for the TalentSoft solutions create challenges for the company in the market
- Workday HCM, Cornerstone OnDemand, Oracle HCM Cloud, Moodle, Avature are some of the rival software for TalentSoft Cloud-based talent management and learning solution

SaaS Solutions Portfolio



Sources: TalentSoft news; PAT Research; Trust Radius; Talentsoft; Gartner; Strategic challenger Notes: iPaaS* (Integrated Platform as a Service)

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SaaS

Kronos HCM solution provides software tools to deliver HR, payroll, talent, and timekeeping in one system

Kronos Profile (1/2)



| | | | | Cor | npany Overview | | |
|---|---|--|---|--|---|--|--|
| Company HCM Solutions Services Sector Focus | software's | | | | Kronos is a provider of workforce management and human capital management Cloud solutions The Workforce Ready suite combines the power of workforce management and human capital management (HCM) in one unified Cloud platform Kronos HCM offers a complete range of HR services such as analytics, talent | | |
| Annual Revenue Employees | \$1433 Mn (20 6,000 (2019) | 19) | | | acquisition, time keeping, accruals, attestation, scheduler, payroll services, Kronos serves medium to large enterprises and small and medium seized b Kronos operates from 70 offices from 16 countries around the world | | |
| Kronos has 40 r countries at mo | re than 33,000 d ld who rely on K day re than 4,000 cu | over 100 organizations ronos workforce | backup ar It provide vulnerabil Kronos te solution ir | e Read nd fail es Pene lity tes echnica nfrastr | curity systems ly leverages multiple levels of over protection etration testing, antivirus & sting is done by third party al consultants manage the ructure, client's applications and to ensure multilayer security | | Integration Systems & Platforms Integrated with Outlook to make communication between managers and employees efficient and quick Kronos provides an enhanced integration with SAP SuccessFactors that helps simplify complex and challenging global (HCM) requirements |
| | | Partner Eco | osystem | | | | Key Clients |
| Service F accenture AXSI AC HyBridge Solutions Attos SABILITY | UM NGA Human Resources | CISCO. Google f | or Work | | /Care | | |

Sources: Kronos Website; Business Wire; SAP; Kronos Annual Report; Kronos-Markets; Kronos- Security Notes: Workforce Integration Manager (WIM); Open Learning Services Architecture (OLSA)

Kronos strong workforce management solution and AI enabled capabilities are its strength

Kronos Profile (2/2)

Future Strategies

- Kronos plans to extend its reach in India
 - Kronos is focusing on will continue to target middle market clients
- (>500 to 15k employees) as its ideal client demographic Kronos is increasing its focus on providing mobile-first user experience that is device-agnostic, eliminating the need for a separate mobile application and allowing users to move from
- mobile phone, to tablet, to desktop with no feature loss

Pricing Models and Add-ons

- Kronos quotes each job on individual basis depending on the software, number of users and number of managers
- No extra charges for assistance in solving issues
- Kronos' AI-engine. AIMEE is built on Google's AI platform and available as an add-on

Strengths

- Kronos offers commanding workforce management and AI-enabled capabilities
 - Kronos Workforce Mobile helps in completion of Workforce management tasks and provides view on HR information
- New functional module expansions in benefits management, learning administration and the continued use of AI and machine learning in WFM

Challenges



- Workforce Ready may not be suitable for organizations with morecomplex Talent Management and analytics requirements
 Customers have shared least satisfaction with workforce analytics.
- as well as social/collaboration capabilities in Gartner Magic Quadrant Analysis

SaaS Solutions Portfolio



Sources: Kronos Website; Kronos Annual Report; Kronos- Compensation; Kronos- Talent Pools; Kronos- Security

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Infor Inc. offers diverse range of solutions for enabling smooth business operations for its clients

Infor Profile (1/2)

| | | | C | ompany Overview | | | |
|--|--|--|--|---|---|--|--|
| Company ICM Solutions Services Sector Focus Annual Revenue Smployees | | | SCM, FM | It delivers integrated entermanagement It also offers enterprise a financial management sol It also offer solutions for | ree segments: License, Maintenance, and Consulting erprise business solutions, customer relationship sset management, enterprise resource planning (ERP), utions HCM, performance management, product lifecycle nanagement systems, central reservations systems etc. | | |
| Infor is located in 41 countries and has 68,000+ customers It has 1,740 partners and support experts each Application Security Network Security Physical Security IT Infrastructure | | | The security app Infor Cloud S Application Se Network Secu Physical Secu IT Infrastruct | ecurity ecurity ırity rity (Data Centers) | Integration Systems & Platforms Infor's advanced middleware Cloud platform supports in integration Infor ION supports in complex web enterprise systems operations It connects applications with the events in the business process It easily monitors business processes | | |
| | | Partner Ecc Alliance F accenture Capgemini AWS | artners Deloitte. | Delivery Partners CLINTON RUBIN Exercises LLC CoppioGroup COppioGroup COPPIOGROUP COPPIOGROUP COPPIOGROUP COPPIOGROUP | Liberty Healthcare Pilot: FLYING: Pilot: Construction Management Management Pilot: FLYING: Pilot: Construction Pilot: Management Pilot: FLYING: Pilot: FLYING: Pilot: Management Pilot: FLYING: Pilot: FLYING: Pilot: Pilot: Pilot: Pilot: Pilot: | | |

Sources: Infor Revenue; Infor Partners; Infor Security

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infor

Company faces localization challenges while offering product and services outside U.S.

Infor Profile (2/2)

Future Strategies



Infor has deep commitment in industry specialization

- Infor is focusing on incorporating network, analytics and artificial intelligence capabilities to make connections across enterprises
- Infor is targeting in industry, Cloud, network, analytics and artificial intelligence for growth strategy

Pricing Models

Infor Inc. provides following pricing methods: Annual subscription

Strengths

- Infor has strong market position in their Cloud Suites and software products
 - Infor's software doesn't have expensive customization
- Infor Upgrade Program offers path for modernizing customers on premise installation of Infor Applications
- Recognized as a Leader in 2020 Nucleus HCM Value Matrix for personalization and customization in its HR applications

Challenges

- Infor faces challenge in operating outside U.S. resulting in added costs and inherent challenges with localization of the product and service offerings
- Infor brings limited value via its partners ecosystem, they are
 - lacking in global partnerships Infor faces large, established competitors, specialized competitors
- and substantial price competition

SaaS Solutions Portfolio



SaaS

Sources: Infor 10-k Report; Infor resources

NGA Human Resources provides HR and payroll services 🥏 to its large number of clients

NorthgateArinso (NGA) Human Resources Profile (1/2)



| | | Com | pany Overview | | | |
|---|--|---------|--|---|--|--|
| Company HCM Solutions Services Sector Focus Annual Revenue Employees | Northgate Information Solution Client service, Support and Trainin Diversified customer segment \$4.67 Bn (FY18) 5,300 | | It offers talent administrative people analytics, as well NGA implemented a mark strategic product-market | zed business, UK large and mid-market business, Australia and New | | |
| NGA HR has implemented 1,300 HR and Payroll system implementations It has presence in 188 countries The security approx NGA HR Privacy Safe Harbor/Priv Security and Control | | | urity systems ach consists of Notice acy Shield Statement npliance Standard for I Party Service Providers etc. | Integration Systems & Platforms NGA HR offers fast implementation methodologies for deploying SAP SuccessFactors modules It features step-by-step guided process that supports like traditional blueprint approach | | |
| SAP SuccessFactors | Partner Ecc | osystem | Ingentis | Key Clients Standard Standard Standard St | | |
| 📽 benify N A | KISA SAP be | | people 6 | SANOFISecurextenovaPrysmian Groupexertisclariant | | |
| rces: <u>NGA HR Website;</u> B | loomberg | | | Capgemini Invent 2020. All rights reserve | | |

NGA's acquisition by Alight will help strengthen benefits, 🥏 payroll and HR solutions portfolio

NorthgateArinso (NGA) Human Resources Profile (2/2)

Future Strategies

- NGA HR is focusing on compliance, standardization and analytics and it is also focusing on incorporating its BPS* Services especially global payroll into its Cloud HR deals
 - For the U.S and Europe organizations, NGA HR leverages SAP SuccessFactors and Workday also working with Oracle HCM Cloud
 - NGA HR is continuing to add payroll connectors and partners to enhance its delivery

Pricing Models

NGA HR provides following pricing methods:

- NGA Cloudify Payroll has flexible pricing options in a 'rental model'
- euHReka and Moorepayhr has subscription pricing per employee per month, depending on the service level selected

Strengths



- Strong client reference for Cloud services, established brand and deep experience in the global payroll and multi-process HRO space It has gained early mover advantage in HR BPaaS* services because of early start of proprietary platforms and clearHRsky Named a key implementation partner in SAP's Gold Guide
- Acquisition by Alight will bring an enhanced level of technological capabilities across benefits, payroll and HR solutions

Challenges



- Selling end-to-end solution to organizations having up to 25,000 employees, which requires highly customized solutions
- Lack of implementation capabilities for Workday and Oracle HCM
- Among third party platforms low utilization of ongoing AMS services

SaaS Solutions Portfolio



SaaS



Human Recources

SumTotal Systems provide Cloud-based Talent Expansion 🥏 solutions to its clients

SumTotal Profile (1/2)

| | | - | | | | | | | |
|---------------------------|---|--|-----------------------|--|---|--|---|--|--|
| | | | | Con | npany Overview | | | | |
| Company | SumTotal Systems Inc. | | | | SumTotal Systems is the only HR software provider to deliver Talent Expansion | | | | |
| HCM Solutions Services | Client service, Support and Training | | | solutionsSumTotal delivers solutions through multiple Cloud-based channels, including | | | | | |
| Sector Focus | Diversified cust | omer segment | | | The company has offices | in US, (| Hosted Subscription, and premises-based licensure S, Canada, China, Australia, India, Germany, France, | | |
| Annual Revenue | \$62.1 Mn (2017 | 7) | | | Japan, Singapore and the Skillsoft and SumTotal and | ers to thousands of leading global organizations | | | |
| Employees | 945 (2017) | | | | | • | | | |
| Imple | Implemented markets Se | | | | | | Integration Systems & Platforms | | |
| |) countries includi UK, France, Germ Ingapore | | • NA | | | | SumTotal offers its solution either via Cloud- based or on-premise deployment The SkillSoft OLSA integration tool eases the administrative burdens of maintaining SumTotal learning libraries | | |
| | | Partner E | Ecosystem | | | | Key Clients | | |
| System Inte | egrators | Technolo | gy Partners | | Resellers | | Fidelity & Greenway Seagate | | |
| | Bluewater | dominKnow connect the the CHASMA | Training Orchestra | | CRMG CleeVoaz SIfy SCHAMP, LLC CleeVoaz Sify SCHAMP, LLC CleeVoaz digital cues | of A | dit Services merica AMERICAN SUBRACE GROUP ALL CANADA ALL CANA | | |

Sources: SumTotal Company Website; Sumtotal Partners; Sumtotal Clients

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sumtotal

SumTotal invests in innovation which helps in strong usability and functionalities of its solutions

SumTotal Profile (2/2)

Future Strategies

GP Strategies offering learning management system implementation and support through SumTotal's platform is at the core of SumTotal's strategy

Pricing Models

- SumTotal LMS follows yearly subscription per user starting at \$57 SumTotal LMS offers different service plans such as Commitment
- Free, Month-to-Month Option, Customizable Plans, Reduced Price for Multiple Users
- SumTotal Learn is available at \$10,000/one-time

Strengths

- SumTotal offers full breadth of HCM solutions
- SumTotal continuously invest in innovation which leads to strong usability and functionability
- Its platform unites disjointed business processes
- SumTotal enables organizations to develop talent through an employee lifecycle by integrating Skillsoft's multi-modal content

Challenges



- Data security, data integration and legislative changes in Payroll and Benefits under SumTotal Work solutions are the main challenges
- SumTotal needs to improve its learning by deeper integrations across the product suites and improving analytics capabilities

SaaS Solutions Portfolio



Sources: Onelogin *Notes: BPS-Business Process Services SaaS



sumtotal









IBM Kenexa, a Cloud-based recruitment and talent management provider integrates people and processes

IBM Kenexa Profile (1/2)



| | | (| ompany Overview | | | | |
|--------------------------------------|---|------------------------|--|--|--|--|--|
| Company | IBM (Kenexa) | | IBM Kenexa develops Cloud-based recruitment consulting and outsourcing solutions | | | | |
| HCM Solutions Services | Assessment test, HR analytics, L&D and more | engagement survey, | The company also offers ve | It offers working planning, selection, hiring and retention software The company also offers vendor and agency management, employee referral program designing, recruitment strategy analysis, internal mobility planning, and | | | |
| Sector Focus | Diverse Sectors | | change management | | | | |
| Annual Revenue | \$77.1 Bn (2019) | | | the North America, Europe, Asia and Middle-East region uitment solutions to find, hire, onboard and nurture the | | | |
| Employees | 352,600 (2019) | | right talent | | | | |
| Imple | emented markets | | Security systems | Integration Systems & Platforms | | | |
| industries, such healthcare, reta | over 9,000 customers in as finance, education, il, call centers, and hospitality North America, Europe, Asia region | | ancial USA 7017/27018 | The IBM Kenexa Talent Acquisition Suite supports versions of Internet Explorer (IE), Mozilla Firefox (FF), Google Chrome and Safari Through cognitive solutions, the company offers an integrated talent management platform | | | |
| | Partner E | cosystem | | Key Clients | | | |
| Assessm Partne | rs Screening accurate | Partners HIRE RIGHT | Assessment Integration Partners OStaff SmartSearch | bp COURTE CO | | | |

Sources: IBM Kenexa; Press releases; Annual Report 2019; Appsruntheworld

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Kenexa provides HR insights on personalized drag and drop dashboards of the users

IBM Kenexa Profile (2/2)

Future Strategies

- Strong focus on use of AI in future HR landscape and in regards to closing of employee skill gaps
- Aims to enhance the innovation curve in the domain of employee experience through strategic partnerships (partnered with *Qualtrics, a provider of Experience Management platform*)

Pricing Models

IBM Kenexa offers a vearly subscription based pricing model for its HCM solutions

Strengths

- Performance management functionality is very strong in its product, Career Tracker
- Engaging candidates on social media and delivering exceptional candidate experience on virtually any device is the main strength of its product Talent Acquisition Suite
- Easy customization available for viewing the candidate's interview and hiring progress

Challenges

- Issues in regards to keyword search and duplicate entries
- IBM Kenexa faces challenges in following aspects:
 - Core HR in the Cloud
 - Next Generation UI
 - Payroll & Benefits
 - Workforce Management
 - Predictive Insights Built-In



Sources: IBM Kenexa Website; Grupo Business; Digital Market Place; G2; PRNnewswire

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SaaS















ADP has transitioned its new products from SaaS platforms to mobile first platforms

ADP Profile (1/2)



Sources: ADP Website; Annual Report 2017; Press Release

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The company offers quote based pricing and annual subscription model to all its customers

ADP Profile (2/2)



Future Strategies Strengths ADP has strong business operations and is well funded, which drives significant research and development activity ADP is strategically investing in innovation and technology to Through tools such as Manager Insights, ADP Apple Watch Apps address the future of workforce sourcing, engagement, and payroll dashboards, they offers innovation in UX and manager management and compensation experience Offers HR and Payroll App to track pay statements, manage time and attendance and assess retirement accounts **Pricing Models** Challenges Quote based pricing ADP lacks social and informal learning capabilities Mostly offer annual subscription models and the company also ADP's commercial model for Vantage is relatively complex, as it has charges set-up fees a mix of per-employee and transactional pricing SaaS Solutions Portfolio Recruitment **HRM Core** Workforce Performance Learning and HRMS Compensation and Platform Functions Management and talent Development Engagement Onboarding x x x 🗸 🗸 \checkmark ✓ x ✓ ✓ ✓ Х х x х x х

SaaS

SilkRoad offers a scalable and personalized range of solutions for mapping an employee's career-graph

SilkRoad Profile (1/2)



| | | Сог | mpany Overview | | |
|--|---|----------------|--|--|--|
| Company HCM Solutions Services | SilkRoad Technology, Inc. Strategic Onboarding, Talent Bra Training and Education, Manage | | SilkRoad Inc. is a global multinational human capital management software company headquartered in Chicago, Illinois, and founded in 2003 It is a Cloud-based HR software solutions that enable customers to find, attract, develop, and retain talent The talent acquisition solutions enables users to access HR applications and recruitin application helps companies to use social media channels for recruiting It also assists organizations to retain, engage and keep its employees connected at | | |
| Sector Focus Annual Revenue | All Sectors | | | | |
| Employees | 348 (2015)* | | an enterprise-level | is to retain, engage and keep its employees connected at | |
| Implemented markets Se | | curity systems | Integration Systems & Platforms | | |
| around 28 languages Possess offices in 7 countries and has around 25 Mn onboarding experiences every year The company has more than 1,800 mid-market 27000 family of as the framewo Silkroad provide Principles of Inf | | | CIS TOP 20, NIST and the ISO f information security standards ork of security practice es Security based on the C.I.A. formation Security, SSAE 16 tation; and a host of compliance ng Safe Harbor | Offers Integration-as-a-Service SilkRoad leverages modern API to connect SilkRoad data to applications Integrates solutions with leading third-party vendors like Taleo, Peoplesoft, ADP, SAP & ERP It will integrate all old and new talent applications with Microsoft applications | |
| | Partner E | cosystem | | Key Clients | |
| Microso | | indeed M | | | |
| Oddzu | na 🚳 First Advantage | Johing com | | BenefitMall Sen-PROBE | |

BOUNTY JOBS

Jobing.com

.::LiveCareer*

Oadzuna

Sources: SilkRoad Website; Press release *Note: Talent Management System Implementation & Customer Onboarding

💮 First Advantage

Newlink

IRi

Bernick's

SilkRoad has a strong clientele base due to its pre-sales,

SilkRoad SilkRoad Profile (2/2) **Future Strategies** Strengths Accommodates all types of employees such as contractors Recognized as a Core Leader in 2020 Fosway 9-Grid for Talent SilkRoad has invested considerably in expanding its overseas Acauisition presence, with an increasing percentage of overall Talent Strong product updates such as released new features for Management suite revenue coming from the Asia / Pacific region, **Onboarding & Employee Experience Solutions** Central Europe and Eastern Europe Also announced a new solution called SilkRoad Succession Planning for planned and unplanned talent transitions **Pricing Models** Challenges Interface is not always intuitive or user-friendly. Also, the recruiting SilkRoad offers a monthly based pricing for its HCM solutions module has limited reporting and customization functionality Mobile device use and support is still evolving SaaS Solutions Portfolio Recruitment HRM Core Workforce Performance Learning and HRMS Employee Compensation and Platform Functions Management and talent Development Engagement Onboarding х ✓ x ✓ x x x x x x x x

SaaS

Sources: SilkRoad Website; Topadvisor; Silkroad; Businesswire; Talent acquisition

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AFAS develops innovative HR and payroll software solutions for both businesses and consumer market

AFAS Profile (1/2)



| | | Co | mpany Overview | |
|---|--|---|---|--|
| Implemented in Caribbean mark Implementation company sizes r | possible for a variety of anging from companies with loyees up to companies with | Se | AFAS is a Dutch family-owned company, founded in 1996 AFAS Holdings, B.V. operates under its subsidiaries such as AFAS Software Beand AFAS Software Caribbean AFAS offers Cloud-based HR and payroll solutions to its users globally These solutions offer customized services which fully integrates with the exist deployed HR and finance software It also assists consumers to track their personal finances through AFAS Person ecurity systems d by ISO9001 and ISO27001 It easily integrates the existing solutions Cloud-based HR applications | |
| | Partner I | Ecosystem | | Key Clients |
| | ATPS Gray | BVB.corr van wely van wely bundle consultancy | ce Partners FRQUE Gjald [®] incontrol ^{®®} AIM PROVE | Image: Construction of the second |

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Sources: Afas Website

AFAS business solutions can easily be integrated into existing installed HR and financial services

AFAS Profile (2/2)

AFAS software



SaaS

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Capgemini

PLEASE CONTACT



Head of People & Organization

Marjolein Wenderich

+31 6 513 667 28 Marjolein.Wenderich@capgemini.com



Jan-willem van Plateringen Team Lead Cloud HR

+31 6 150 300 05 Jan-willem.van.plateringen@capgemini.com



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