

Generating Value

The Capgemini Energy, Utilities & Chemicals Global Sector

Thriving on Change

The energy, utilities and chemicals industries each face challenges linked to significant changes. Energy has become more than ever a strategic issue, directly impacting the utilities market through its sourcing strategies and triggering security of supply issues. In this context, new investments in infrastructures (such as plants, lines, pipes) as well as compliance with European rules and global treaties (Kyoto protocol) are now priorities for utility companies. Oil and gas companies are focusing more and more on their upstream business with the objective of increasing the production of existing fields and replacing oil reserves. Having recovered after some difficult years, the chemicals industry has to adapt to new client needs, European legislation and high energy prices.

Capgemini's Energy, Utilities & Chemicals Practice serves the business consulting, information technology and outsourcing needs of more than 75% of the top 20

private and public utilities, and 9 out of the top 10 oil and gas "super majors"¹. Gartner, Inc. has ranked Capgemini:

- #1 in Utilities for IT Services in Western Europe (Gartner/Dataquest 2007),
- #1 in Utilities for Consulting Services worldwide (Gartner/Dataquest 2007),
- #2 in Utilities for IT Services worldwide (Gartner/Dataquest 2007).

Furthermore, Capgemini is #5 in the Oil Industry for Consulting & IT Integration worldwide.²

With more than 10,000 consultants dedicated to Energy, Utilities & Chemicals projects across Europe, North America and Asia Pacific, Capgemini:

- Develops cutting-edge industry specific solutions such as



low cost retail business IT solutions (E-tailer), Smart Metering, Smart Grid & and Smart Home (utilities), Smart Operations (oil and gas), and Service-Oriented Architecture to help companies meet their market demands,

- Implements actively the group's Rightshore® delivery approach to the benefit of its clients,
- Trains consultants on the challenges and solutions of these industries within its own Utilities Training Program,
- Conducts with its Utilities Strategy Lab in-depth studies and surveys to develop a vision of industry changes and helps companies adapt to the uncertainties of the business world,
- Forms alliances with the leading providers of industry solutions,
- Participates in conferences through partnerships and expert presentations,
- Is Principal Sponsor of the Platt's annual Global Energy Awards for the sixth year.

The Energy, Utilities & Chemicals Practice's mission includes three major areas



Source: Capgemini

Worldwide Leading Consulting and Technology Service Providers for Utilities, ranked by revenue (2006)

Top 3 Consulting Providers in the Utilities Industry				Top 3 IT Services Providers in the Utilities Industry			
Rank	Firm	Revenue (\$M) 2006	Compound Annual Growth Rate 2005-2006	Rank	Firm	Revenue (\$M) 2006	Compound Annual Growth Rate 2005-2006
1	Capgemini	199	14.5%	1	IBM	2,809	2.8%
2	Accenture	182	11.0%	2	Capgemini	1,541	15.5%
3	IBM	179	2.4%	3	Accenture	1,262	10.7%

Top 3 Development & Integration Service Providers in the Utilities Industry				Top 3 IT Management Service Providers in the Utilities Industry			
Rank	Firm	Revenue (\$M) 2006	Compound Annual Growth Rate 2005-2006	Rank	Firm	Revenue (\$M) 2006	Compound Annual Growth Rate 2005-2006
1	IBM	864	1.8%	1	IBM	1,216	2.9%
2	Capgemini	757	15.4%	2	EDS	551	11.4%
3	Accenture	633	9.6%	3	Capgemini	538	16.7%

Source: Gartner, Dataquest: Market Share - IT Services in the Utilities Industry, Worldwide, 2006 (Table abridged by Capgemini) - Published August 2007, Author: Cynthia Moore

1 - As per Platt's 2007 Top250 energy company rankings

2 - IDC-EI Top50 IT vendors in Oil & Gas Industry - June 2007 ranking based on 2005 revenues

Industry-Specific Solutions

Utilities-Specific Solutions

- Portfolio Management
- Risk-based Asset Management
- Reliability Centered Maintenance and Optimization (RCMO)
- E-tailer: low cost retail business IT solutions
- Intercompany Data Exchange (IDE)
- Enterprise Service Oriented Architecture
- Multi Resource Scheduling (MRS) & Mobility
- xApp Emissions Management
- Upgrades
- Water Template
- SAP Projects

Smart Grid

- Smart metering
- Smart grid
- Distributed Energy Resources
- Emerging solutions

For accelerating the deployment of such solutions, Capgemini, HP, Intel, Cisco, Oracle and GE Energy have formed an open collaboration: the Smart Energy Alliance.

Utilities Transformation Services

Strategy and competitive market positioning:

- Entry strategy
- Market modelling
- Performance benchmarking
- Business model assessment

Business transformation:

- Network/Retail business unbundling
- Retail Competitiveness
- Generation/Wholesale/Retail portfolio optimisation
- CO₂ monitoring
- New business models for demand side management and renewable energy portfolio
- Renewable energy strategies

Nuclear Energy

Workforce Planning and Management; Preservation and Transfer of Intellectual Capital; Business Process Reengineering; Fleet Management Practices; Asset Management specific solutions; Market Entry Strategies

Oil & Gas Services

- Integrated Operations Value Assessment and Strategy
- Supply Chain Effectiveness
- Mobility-Specific Solutions
- Performance Benchmarking
- Best Practices Insights
- Business Intelligence

- Business Transformation
- IT Strategy and Governance
- SAP Architecture and Total Cost of Ownership (TCO)
- Asset Management
- Lubricants Effectiveness
- HR Effectiveness

Chemicals Services

Cost reduction programs, Merger/Divestment operational models, strategic sourcing & operational excellence, ERP global roll out, ERP effectiveness, SAP TCO

Applications Management / Outsourcing

- Legacy, new systems and transformational Applications Management (AM)
- Infrastructure Management (IM): centralized/decentralized computing services, service desk
- Business Process Outsourcing (BPO), finance & accounting, human resources, meter-to-cash, SAP back office for Utilities

For delivering outsourcing services efficiently at the right cost, Capgemini's innovative Rightshore® approach provides flexible and scalable solutions (onshore, nearshore, offshore) through over 100 integrated delivery centers globally.



CLIENT LIST INCLUDES

Aclara	Endesa	Repsol YPF
Aker Solutions	ENECO	Rhodia
AkzoNobel	Enel	Rowan Companies
Atel	Eni	RWE
Basell	Essent	ScottishPower
Bayer	ExxonMobil	Sempra Energy
BP	Fortum	Severn Trent Water
British Energy	Gas Natural	Shell
British Gas Services	Gaz de France	SPE / Luminus
Bruce Power	Heritage Propane	StatoilHydro
Centrica	Holly Corporation	Subsea 7
Chevron	Huntsman	SUEZ
CGNPC	Hydro One	Svensk Energi (Swedenergy)
CNOOC	Hydro-Québec	Syngenta
CNPC	Italgas	TenneT
Cognis	Kemira	Terna
ConocoPhillips	LANXESS	TMVW
DCP Midstream	McDermott	Total
DONG Energy	Nuon	TXU
DSM	OMV / Petrom	Vattenfall
E.ON	OPG	Veolia Environnement
EDF	Pidpa	Welsh Water
ELEXON	POWEO	

The Utilities Strategy Lab



The Utilities Strategy Lab is a global network of sector specific consultants and research specialists dedicated to generating content-rich insights into the utilities industry. The research of the Lab is focused on emerging industry trends and topics as well as on key trends in the utilities market. Furthermore, it delivers bespoke research and analysis to support Capgemini's Energy, Utility and Chemical clients globally.

The Utilities Strategy Lab's service offerings are divided into three major parts:

- Monitoring the development of the energy market: The Lab leads major Thought Leadership programs,

including the European Energy Markets Observatory (EEMO). The EEMO has been an annual publication since 2002, covering the progress and challenges of the European electricity and gas markets.

- Points of views on emerging industry trends and topics: The Lab has an integral role in Capgemini's wide range of energy industry points of view. On its own or in collaboration with subject matter experts, the Lab develops in-depth strategic reports on crucial industry topics that stimulate new ideas and help drive innovation for our clients.
- Client bespoke research and analysis: The Lab delivers strategic research, benchmarking and business model evaluation expertise directly to clients or as a subcontractor to existing Capgemini client engagements globally.



About Capgemini and the Collaborative Business Experience®

Capgemini, one of the world's foremost providers of Consulting, Technology and Outsourcing services, has a unique way of working with its clients, called the Collaborative Business Experience. The Collaborative Business Experience is designed to help our clients achieve better, faster, more sustainable results through seamless access to our network of world-leading technology partners and collaboration-focused methods and tools. Through commitment to mutual success and the achievement of tangible value, we help businesses implement growth strategies, leverage technology, and thrive through the power of collaboration. Capgemini employs over 80,000 people worldwide

and reported 2007 global revenues of 8.7 billion euros.

With 1.15 billion euros revenue in 2007 and 10,000+ dedicated consultants engaged in Energy, Utilities and Chemicals projects across Europe, North America and Asia Pacific, Capgemini's Energy, Utilities & Chemicals Global Sector serves the business consulting and information technology needs of many of the world's largest players of this industry.

More information about our services, offices and research is available at www.capgemini.com/energy.

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