

# Capgemini Positioning in the Dutch Market Trends and Analyses

September 2007  
Marketing & Communications

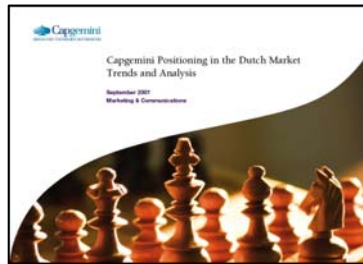


# Market positioning and market scan of Capgemini are presented in two documents

1

## Market positioning

- Capgemini positioning in the Dutch market, including Directional Policy Matrices, SWOT & 5 Forces analysis
- Capgemini positioning in the Dutch labour market
- Competition
- Strategic alliances



## Objectives

- To support the business planning and strategy process for disciplines and market sectors / segments
- Input for sales- en account managers, to support the sales process

2

## Market scan Capgemini

Outside-in view, quoting Gartner, Forrester, PAC Sitsi, AME Research, Miljoenennota, etc. on the crossroads of domains/competences and market sectors/segments



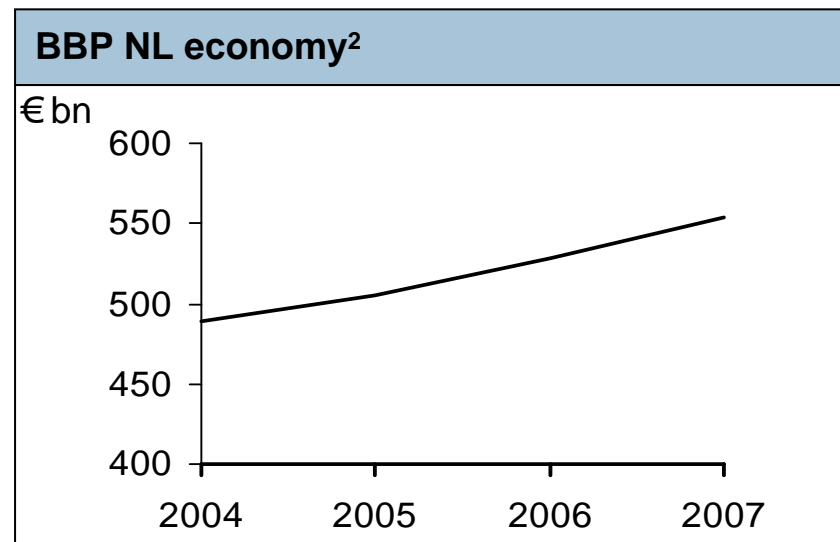
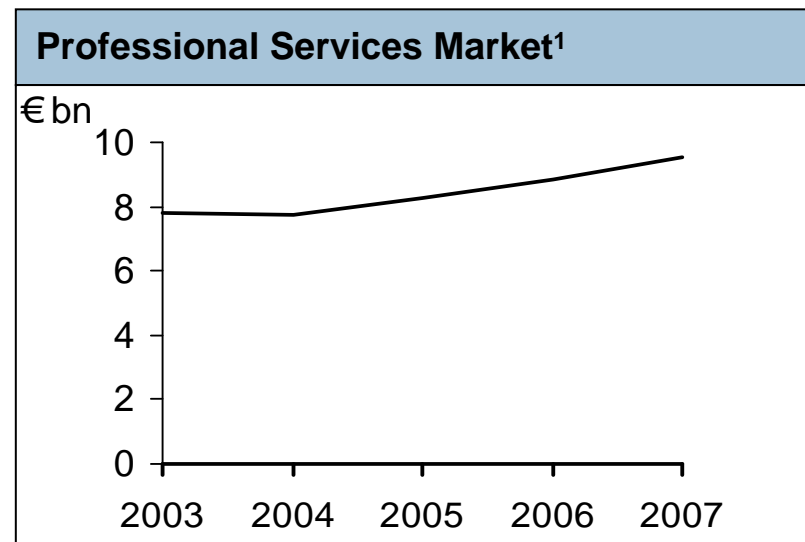
- Idem
- Reference document

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*Slechts een klein deel van het onderzoek is zichtbaar in verband met concurrentiegevoelige informatie*

# The Dutch professional services market has been in line with the growth of the Dutch economy



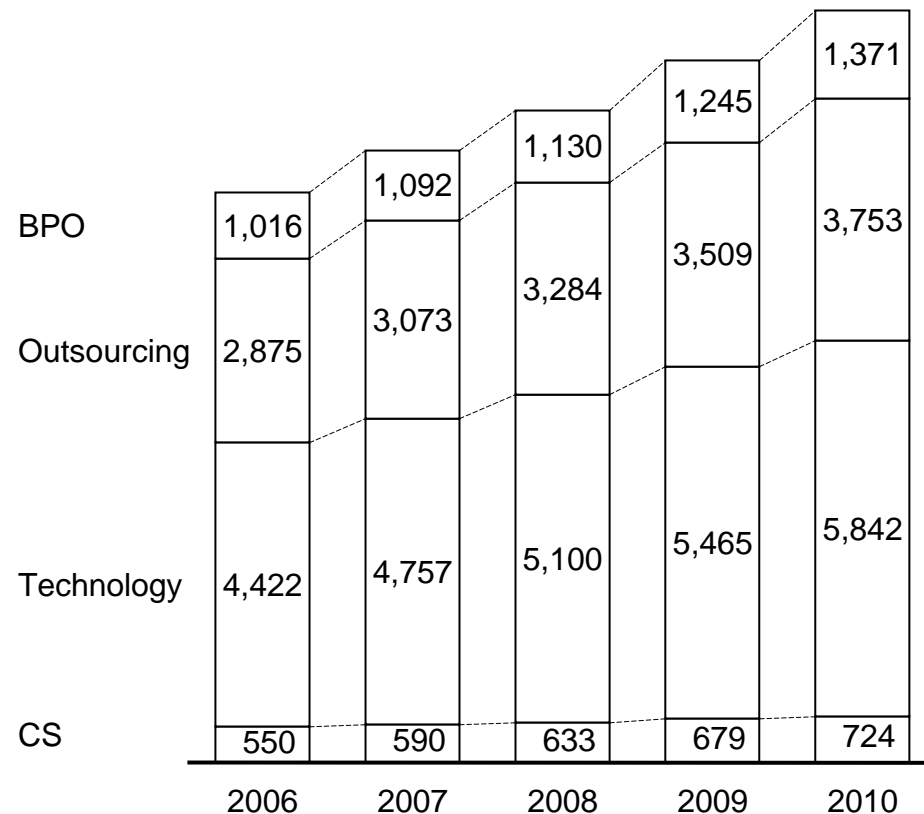
## Trends in the Dutch market

- The Dutch economy is expected to grow 3% in 2007. After a long period of moderate growth the economy is now definitely accelerating. The international competitive advantage has improved.<sup>3</sup>
- The market for ICT services is still growing. If cost-cutting is done, then it is mainly in ICT-consultancy and custom software, followed by buying printers/copiers and business consultancy.<sup>4</sup>
- A great change in demand may come from the generation who are currently students. They are knowledgeable customers, not intimidated by technology and expect services and support that mirror personal experiences with Amazon.com, YouTube, MySpace and other models for delivery of service and support.<sup>5</sup>
- There is a growing need for companies to be socially responsible to their employees, customers and shareholders.<sup>6</sup>
- Security is a growing issue as most companies admit they (wholly) depend on ICT<sup>4</sup> and as the financially motivated but undetected security violations are growing.<sup>6</sup>
- The mobile world is creating what might be called the 'follow-me internet', therefore it must be recognized that location and sensor technology will have much broader use in its applications.<sup>6</sup>

Source: 1. Gartner – IT service worldwide forecast May 2007 2. CBS – Statline, 3. Miljoenennota 2006, 4. Ernst & Young – ICT Barometer 2007, 5. Gartner – Top predictions for industry leaders, 2007 and beyond, 6 - Gartner's top predictions for IT organizations and users, 2007 and beyond

# The Dutch professional services market size amounts to € 8,863 bn, with highest growth rates in BPO\*

## Market size and development, 2006-2010



### Key observations

**In 2006 the Dutch professional services market size was €8,863 billion which is higher than was expected:**

- Technology represents 50% of the market, Outsourcing 32%, BPO 11% and Consulting 6%
- Market growth 2006-2010 is estimated at 7.2% (CAGR), i.e. €+2,827 billion

### Highest growth rates 2006-10 (CAGR) are in BPO:

- BPO + € 355 m (+7.8%)\*
- Technology + € 1.420 m (+7.1%)
- Consulting + € 174 m (+7.1%)
- Outsourcing + € 878 m (+6.9%)

### Rightshore

- It is uncertain how Offshore growth will influence total market size in the professional services market in years to come, also due to the lower charge out rates.

Gartner – IT services worldwide forecast, 2006-2010 – based on information from industry participants/vendors

\* A recent Gartner report predicts an even higher growth rates for BPO of 8.4% during the next five years

# In addition, a recent Gartner report on the Dutch market has some interesting findings

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## **Dutch companies appear to have embraced the trend of engaging with multiple IT service providers**

- Division of competency “by tower”, with different providers focusing each on one environment, such as the network, distributed, centralized, application or business process.

## **IT development and integration services around business applications, in particular ERP, are in high demand in the Netherlands**

- Professional services rates are rising.
- Skills for Microsoft, Oracle and other providers’ platforms are popular, but SAP skills in particular are in high demand and low supply. SAP has a strong position in the Dutch market, and organizations are therefore inclined to want to standardize and align their infrastructures with SAP solutions.
- This leads to increase in pricing for these specialists.

## **The Netherlands is considered EMEA’s competence centre when it comes to consulting services**

- An estimated 200,000 consultants offer their services, with an approximate number of more than 10,000 management and IT consultants.
- The trend to new consulting services offerings in topical areas such as green IT, energy management, business, and IT innovation management is leading edge.

## **The Dutch market shows increasing adoption of BPO, more than just payroll or the general back-office administrative functions**

- Dutch government departments and corporations have been outsourcing payroll services, but are now moving into outsourcing HR and F&A processes.
- There’s an increased confidence in the BPO market, and a need to streamline back-office operations and cost bases.

Source: Gartner Dataquest Insight: The Netherlands Professional IT Services Market, 21 August 2007

# The headcount in India is growing with giant leaps for almost all players

Competitor	India headcount January '07	Growth
TCS	76,362	6,076 net addition in 2006
Wipro	51,024	+28 % in 2006
Infosys	69,432	+15,965 in 2006
HCL	38,317	+38% growth per year
Satyam	29,843	+48% growth per year
IBM Global Services	39,000	+70% in 2006
Accenture	17,000	1,000 additional each month
Capgemini	6,000	Growth through acquisition of Kanbay & organic to 14,965 in 2007
EDS	20,000	Growth through acquisition of MPhasiS from 4.000 to 20.000 in 2007
Atos Origin	1,500	1,200 in 2005 to 1,500 in 2006
Cognizant / Ordina*	38,853	Cognizant: 2006: 60% 2007: 37.5% 2008: 27% 2009: 21%

## Facts

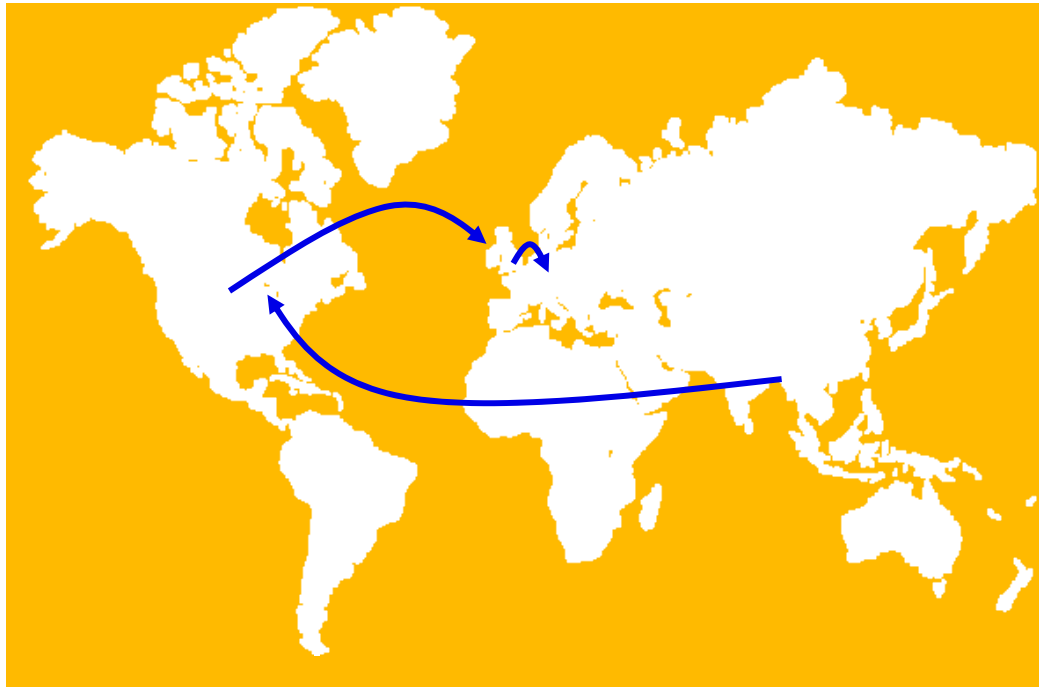
- By 2010 offshore pure players will continue to grow their commercial revenue strongly and will take prominent positions as part of the Global top 10.<sup>2</sup>
- Each provider in new top 10 has following characteristics:
  - Go-to-market front end tailored by vertical processes, client culture and regional processes
  - Global delivery 'export' locations
  - Integrated set of processes, methodologies and tools that are geographically and culturally seamless.<sup>2</sup>
- By 2010, one-third of all enterprises using offshore services will make decisions on all new deals based on geographic business alignment rather than labour arbitrage.
- New vendors in emerging geographic locations will also face a more educated customer.<sup>2</sup>

Sources: Company websites and SEC Filings, 2 Gartner: Predicts 2007: Offshore Outsourcing moves beyond labour arbitrage. InformationWeek, 13 March 2006. EDS news release 8 June 2006, indiaearnings.moneycontrol.com, seekingalpha.com, CIC.

\* Ordina has a partnership with Cognizant, which gives them access to their resources in India



# The Netherlands and the Nordic countries are stepping stones for the European mainland



## Key observations

- India pure players have grown their European revenue by 40% in 2006, whilst retaining high margins
- Highest growth figures in the Netherlands
- After making inroads in the US market, 'India' is now reported to have 'spoilt' the UK market
- They demonstrate an aggressive ('up or out') and successful account based approach, based on functionalities, e.g. credit cards in FS
- Due to relative high margins, The Netherlands, Germany and Nordic countries now serve as stepping stones for the European mainland
- Client intelligence is at a high level at India pure players

Source: focus interview



# Directional Policy Matrices (or GE-McKinsey Matrix) shows which areas should actively be pursued, and which should be divested

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The matrix shows the relative position of each segment or domain using 'Relative Competitive Strength' as the (horizontal) X-Axis and 'Relative Segment Attractiveness' as the (vertical) Y-Axis.

The diameter of each pie is proportional to the revenue accruing to each segment or domain, and the solid slice of each 'pie' represents the share of the market enjoyed by Capgemini.

**Directional Policy Matrices were made for:**

- each discipline in all market sectors
- each segment within each market sector
- each service line within each discipline

**Each directional policy matrix should be viewed on its own.**

- E.g. in Products, the total market sector is more than the sum of its focus segments
- Data generation differs per matrix, e.g. main competitors on sector level may differ from main competitors on segment level

## Each field in the matrix has a message for the segment in it

Relative Market Attractiveness	100%	<p><b>DOUBLE OR QUIT</b></p> <p>Tomorrow's breadwinners among today's R&amp;D projects may come from this area. Putting the strategy simply, those with the best prospects should be selected for full backing and development; the rest should be abandoned.</p>	<p><b>TRY HARDER</b></p> <p>The implication is that the product can be moved towards the leadership box by judicious application of resource. In these circumstances the company should certainly consider making available resources in excess of what the product can generate.</p>	<p><b>LEADER</b></p> <p>The strategy should be to maintain this position. At certain stages this may imply a need for resources which cannot be met entirely from funds generated by the product, (e.g. resources to expand capacity), although earnings should be above average.</p>	
		<p><b>PHASED WITHDRAWAL</b></p> <p>A product with an average to weak position with unattractive market prospects or a weak position with average market prospects is unlikely to be earning any significant amounts of cash. The indicated strategy is to realise the value of the assets on a controlled basis to make the resources available for redeployment elsewhere.</p>	<p><b>PROCEED WITH CARE</b></p> <p>In this position, some investments may be justified but major investments should be made with extreme caution.</p>	<p><b>GROWTH</b></p> <p>Investment should be made to allow the product to grow with the market. Generally, the product will generate sufficient cash to be self-financing and should not be making demands on other corporate cash resources.</p>	
	0%	<p><b>DIVEST</b></p> <p>Products falling in this area will probably be losing money, not necessarily every year, but the losses in bad years will outweigh the gains in good years. It is unlikely that management will be surprised by specific activities falling into this area since poor performance should already be known.</p>	<p><b>PHASED WITHDRAWAL</b></p> <p>A product with an average to weak position with unattractive market prospects or a weak position with average market prospects is unlikely to be earning any significant amounts of cash. The indicated strategy is to realise the value of the assets on a controlled basis to make the resources available for redeployment elsewhere.</p>	<p><b>CASH GENERATOR</b></p> <p>This is typical for product that is moving towards the end of its life cycle and is being replaced in the market by other products. No finance should be allowed for expansion, and so long as it is profitable, the opportunity should be used as a source of cash for other areas. Every effort should be made to maximise profits since this particular activity has no long-term future.</p>	
	0%	<b>Relative Competitive Strength</b>			100%

# The directional policy matrices have been generated with input from sales directors, practice managers and domain leads

## GROUP STRATEGY INPUT FORM V2007

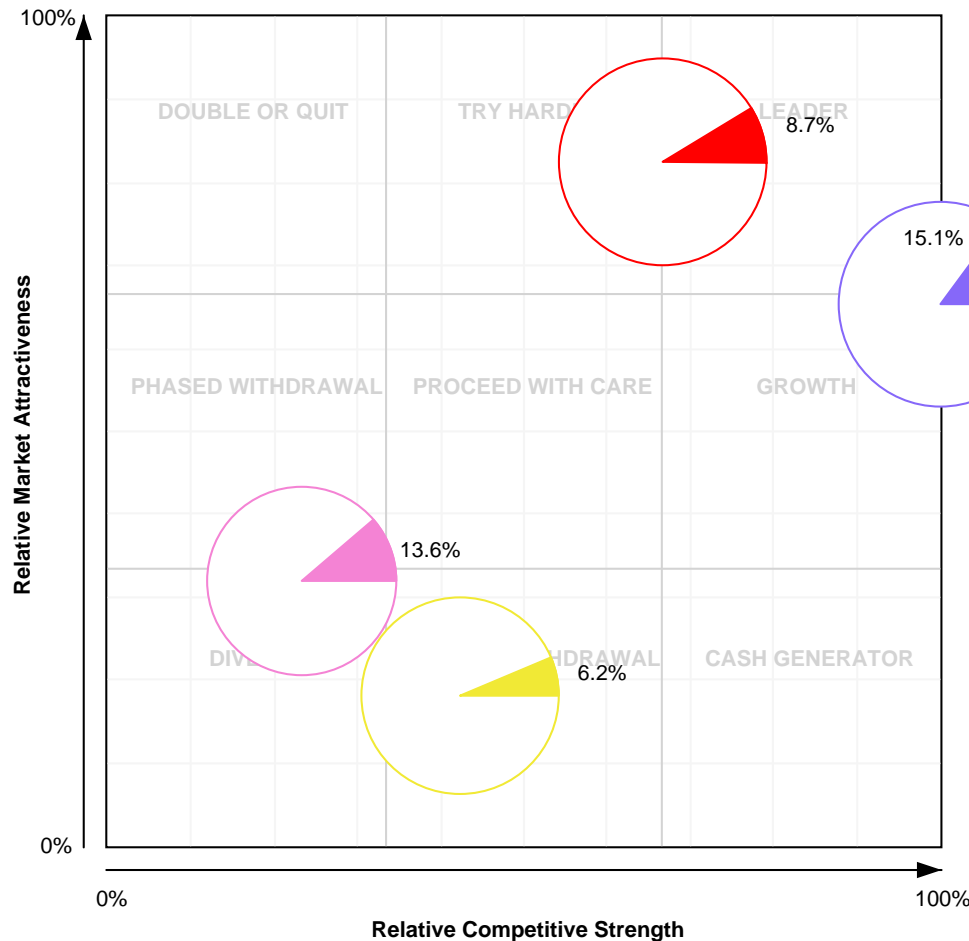
<b>Sector/Discipline</b>		Example: Public / CC				
<b>Offering/Segment</b>		Example: SCM / Healthcare				
<b>Geography</b>	Netherlands					
Select one or two key competitors to compare Capgemini with						
Name of Competitor 1						
Name of Competitor 2						
<b>Within the selected Geography</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	
<b>Market size</b>						Estimated Market size in millions of Euros
<b>Capgemini estimated revenue</b>						Estimated Revenue in millions of Euros
<b>Competitor 1 Revenue</b>						Estimated Revenue in millions of Euros
<b>Competitor 2 Revenue</b>						Estimated Revenue in millions of Euros
<b>Market Attractiveness 2006-2010</b>						
<b>Market size</b>		0	Automatically computed as 5-year average (06 to 10) estimated Market Size			
<b>Market Growth Rate</b>		#DIV/0!	CAGR automatically computed from estimated market size			
<b>Market Profitability Level</b>			Range 1-100 (1=extremely low, 100=extremely high)			
<b>Pricing Trend</b>			Range 1-100 (1= very negative trend to 100 = very positive)			
<b>Competitive Intensiveness</b>			Range 1-100 (1=extremely tough competition, 100=extremely low competition)			
<b>Competitive Strength Today (2007!)</b>						
<b>Market Share</b>	Capgemini	#DIV/0!	Automatically Computed			
	Competitor 1	#DIV/0!				
	Competitor 2	#DIV/0!				
<b>Relative Profitability Level</b>	Capgemini		Range 1-100 (1=extremely low GOP level, 100=extremely high GOP level)			
	Competitor 1					
	Competitor 2					
<b>Relative Capabilities and Assets</b>	Capgemini		Range 1-100 (1=extremely weak, 100=extremely strong)			
	Competitor 1					
	Competitor 2					

## Methodology

1. The first step to take is to name the one or two most important competitors for the specific crossing. For example for Outsourcing in the Public market these are IBM and Getronics
2. Where ever possible, figures on market size and competitor revenue were obtained from Gartner. If Gartner figures were not available, practice managers and domain leads were asked to give an estimate.
3. Relative market attractiveness and competitive strength is a combination of calculation and weighing
4. After completion the input forms are imported in the Matrix V5 software, which generates the directional policy.

# Directional policy matrix TS shows that Capgemini has the critical size to focus on all verticals

## Current strategic positioning of Technology Services in market sectors, 2007



**Key observations**

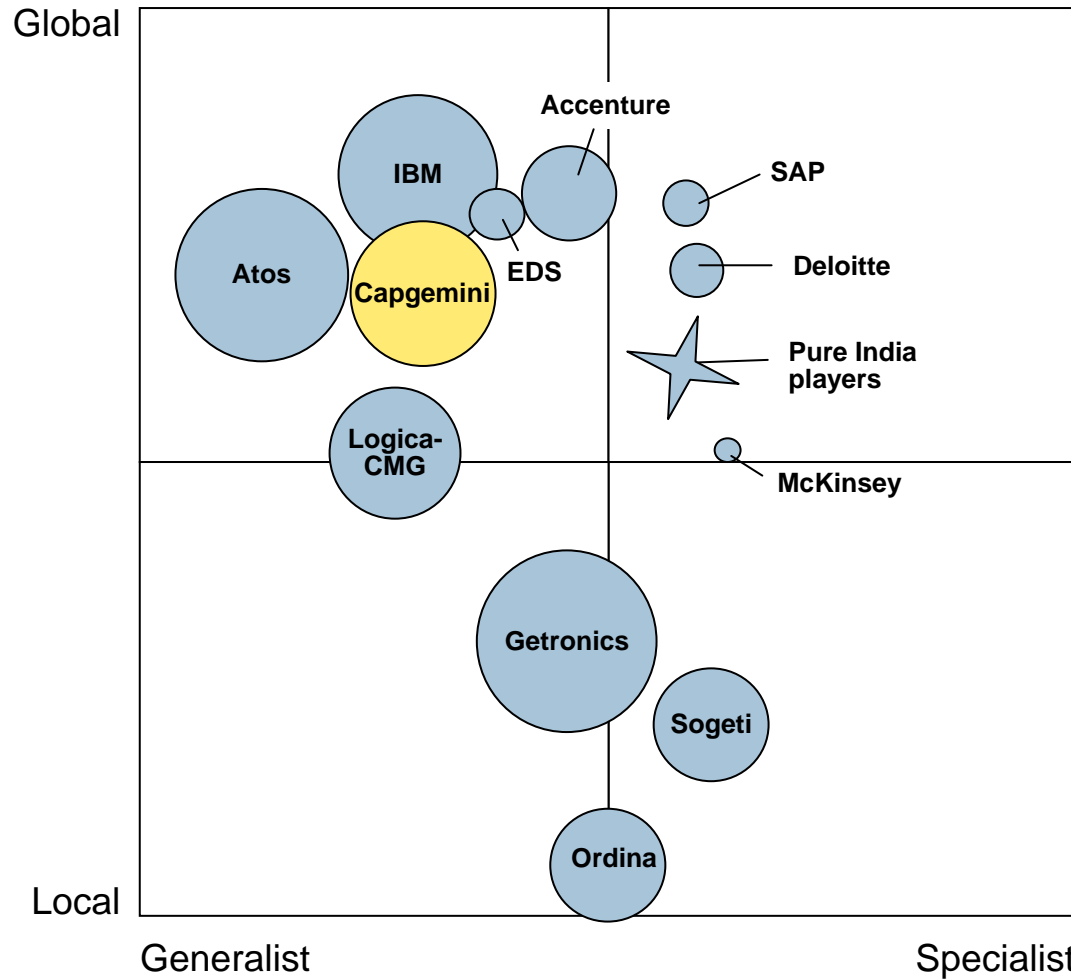
- No strong dependency on specific verticals in the Dutch market; quite heterogeneous positioning, which is positive, as Capgemini has the critical size to focus on all verticals.
- Confidential
- Confidential

	Key Data			
	FS	TTU	Products	Public
Market share 2007	Competitor 21.7%	Competitor 3.0%	Competitor 2.6%	Competitor 12.0%
	Competitor 11.7%	Competitor 14.8%	Competitor 8.8%	Competitor 8.4%
Average market size 06-10	€ 1,090 m	€ 1,208 m	€ 1,324 m	€ 1,281 m
Capgemini CAGR 06-10	confidential	confidential	confidential	confidential
Market CAGR 06-10	7.8%	3.8%	4.2%	6.9%

*Namen van concurrenten zijn verwijderd*

Source: Gartner Market Data

# Competitive landscape in The Netherlands 2006



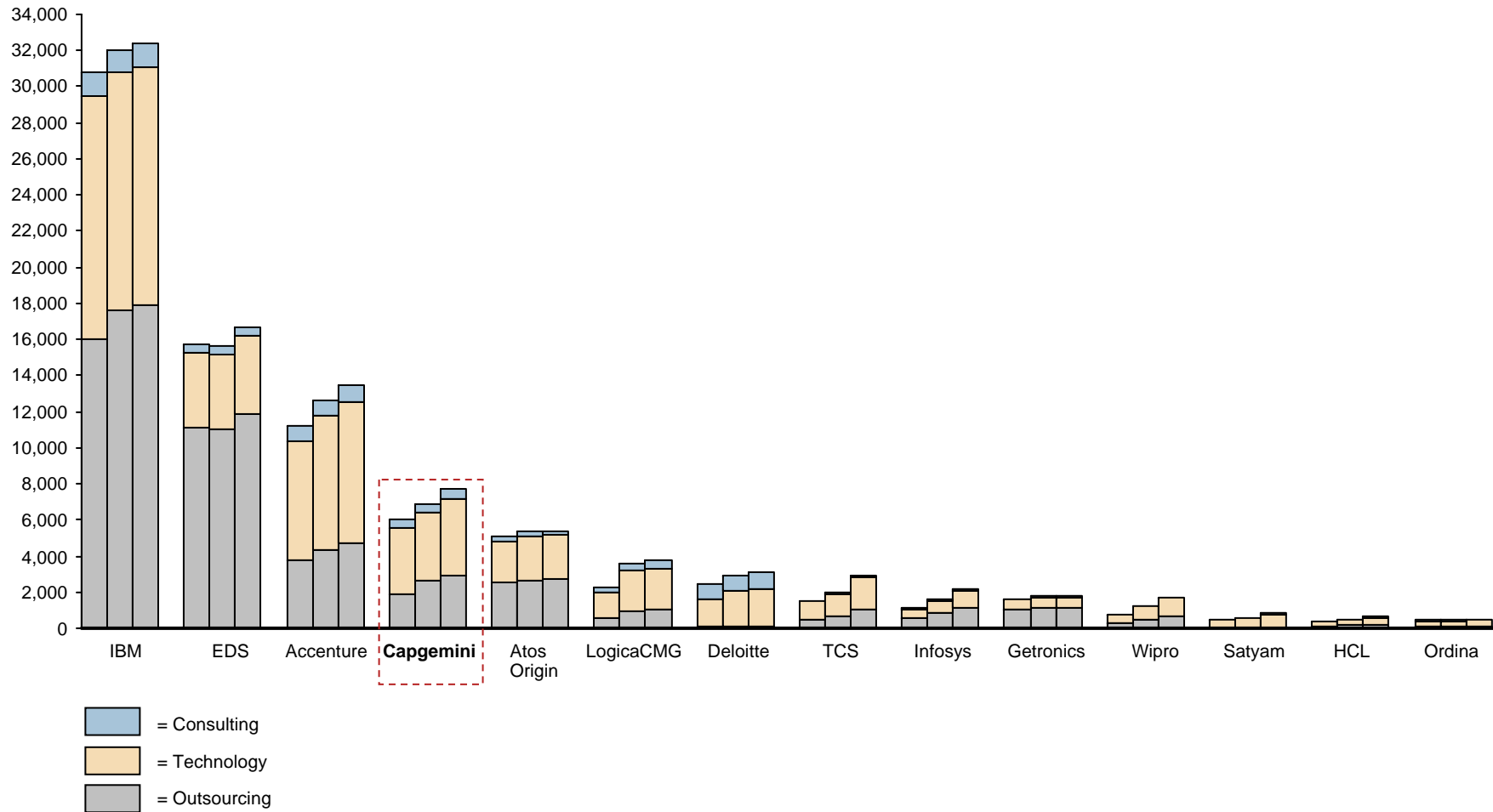
**Facts**

- No major changes in positioning in the past year
- Pure India players are still small considered the turnover reported in the Netherlands; however, not all turnover is reported here
- Clients can turn into competitors when they take control of ICT services and subcontract Indian players for execution (DHL, Philips)

Source: Gartner, annual reports of LogicaCMG, Deloitte, Ordina, Getronics, Atos Origin, Accenture, Capgemini

# Worldwide professional service revenue 2004-2006 of Capgemini and her main competitors

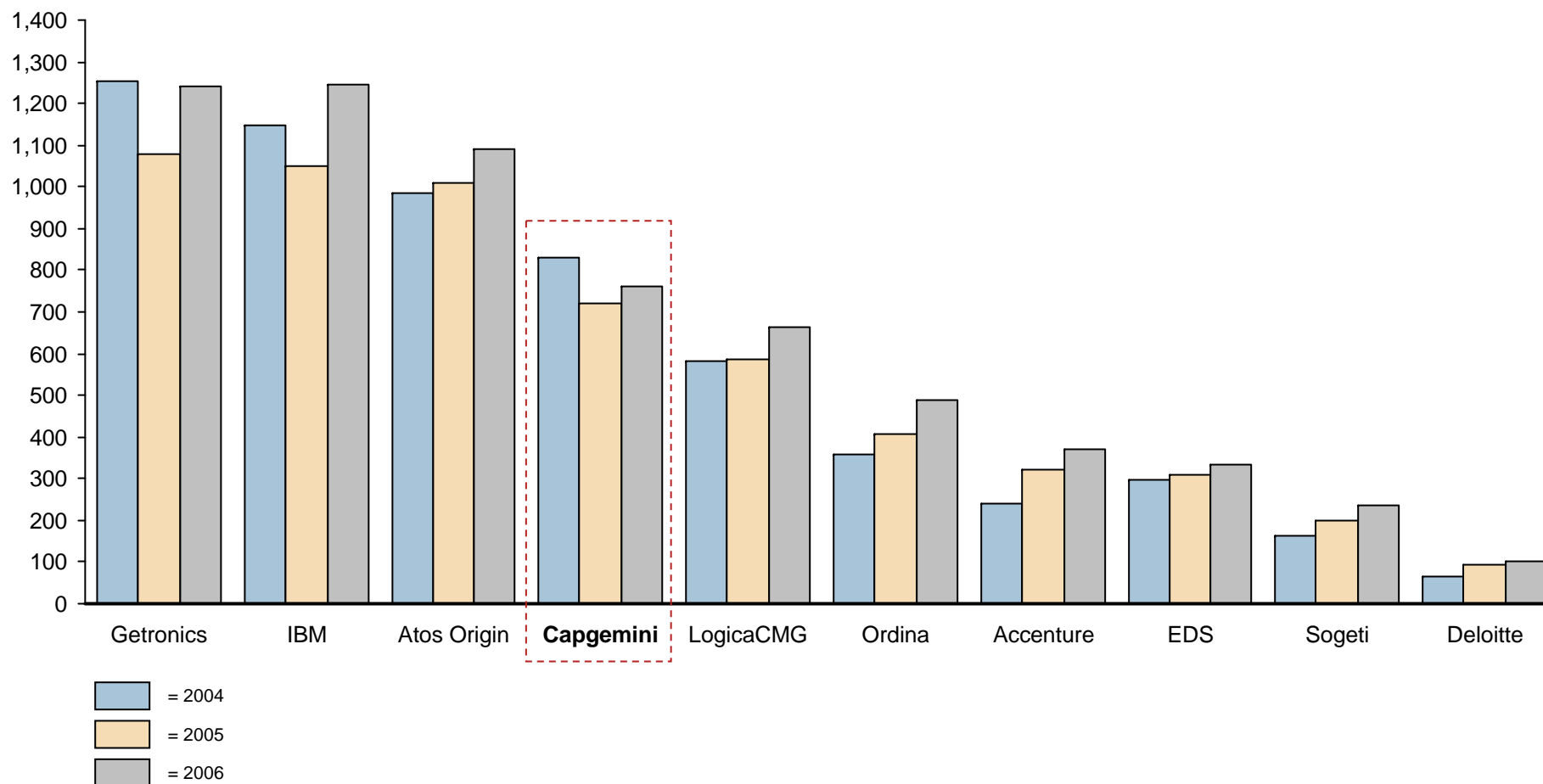
## Competitive positioning 2004-2006



Note: The revenue shown is professional services revenue for a selection of our competitors. Capgemini revenue includes Sogeti.

# In the Dutch market Capgemini ranks fourth

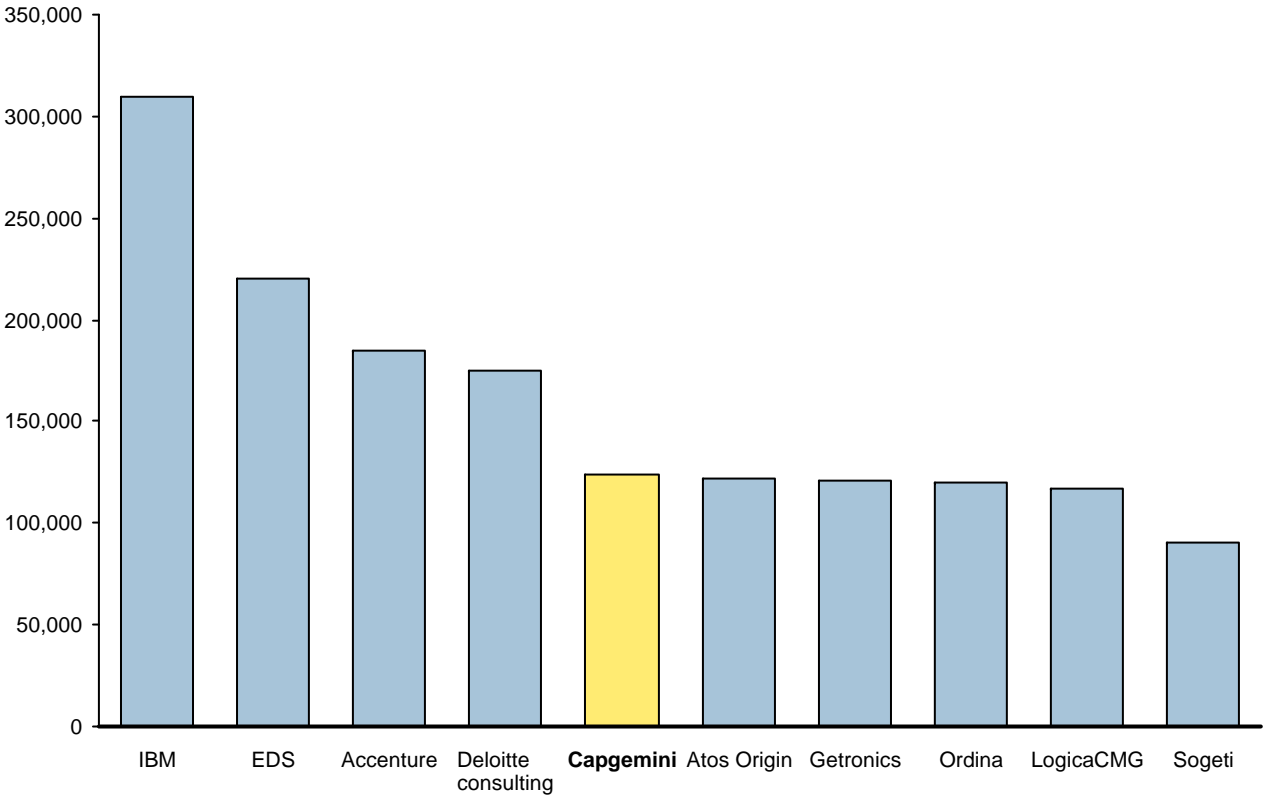
## Dutch revenue (€ million )2004-2006 most important competitors



Note: Indian pure players are not included as financial reporting is on corporate level only, IBM is entire turnover in the Netherlands  
 Source: Annual reports, AME Research, Competitor profiles 2006



# Revenue per employee in The Netherlands in 2006\*



**Facts**

- IBM has the highest turnover per employee, however this turnover also contains hardware sales
- The competitors Accenture and Deloitte who have more consulting projects have a high turnover per employee
- Capgemini, being the largest consulting firm in the Netherlands, should be able to increase revenue per employee

\* Total external revenue NL / total number of employees NL

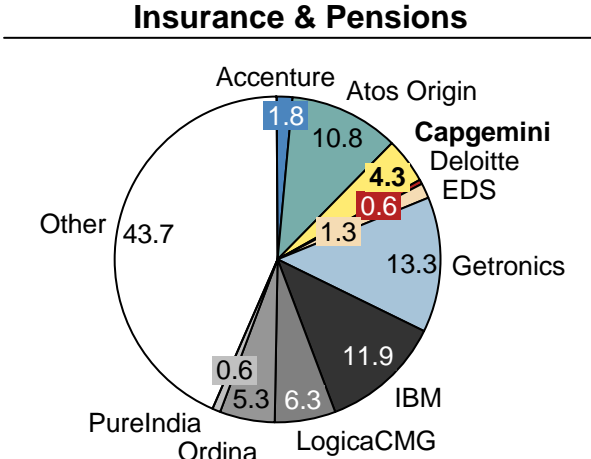
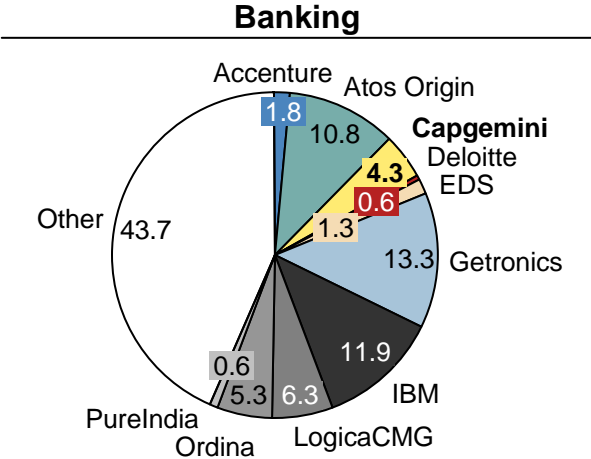
# Our competitors strategies, in a nutshell

<b>Accenture</b>	High performance. Delivered; Collaboration; Diversity in workforce and service (triple service); One Global network
<b>Atos Origin</b>	Accelerate organic growth; increase operational efficiency (global purchasing to reduce costs); Improve ability to operate as a global company (Systems Integration targeting 20% in offshore and nearshore by end 2009; Creation of Managed Operations Global Factory).
<b>Capgemini</b>	Drive successful Kanbay integration; Accelerate the group successful momentum for I3; Roll out a renewed ambition for consulting services
<b>Deloitte</b>	Focus and profitable growth, over size and broadness of offerings; Expanding the range of service to meet the growing needs of business; strong commitment to vertical markets; Becoming the first choice of the world's most coveted talent
<b>EDS</b>	Continue to improve base business and core capabilities; Further expand Global Delivery System; Use infrastructure as base to add higher-value services; Partnering with businesses and governments; Creating industry-enabled solutions that combine appl. expertise, BPO capabilities and IT infrastructure
<b>Getronics PinkRocade</b>	Become a Top-20 global IT service provider; Lead in workspace management services; Focus on regions as the Netherlands, U.K. and U.S. and Global Service Delivery Capabilities; Turning wholly-owned activities into partnerships (i.e. Spain/Portugal, Hong Kong/China)
<b>HCL</b>	Value centricity in customer relationships, selective partnership to augment domain expertise
<b>IBM</b>	Innovation is change; Integration of technology and business processes; Become a truly 'globally integrated company'.
<b>Infosys</b>	Increase BPO offerings through acquisitions and alliances; Scale up banking division globally; Focus on training and mentoring of employees; Expand into new regions in North America, Europe and Asia Pacific
<b>LogicaCMG</b>	Global service delivery model; Strengthen consulting capability; Cross selling in former Unilog and WM data business; Increasing share of business with biggest customers; Divestment of telco products in order to focus on core capabilities
<b>Ordina</b>	High-margin and high-value services with excellent growth potential; Keep a strong local character; Push consulting, BPO, development, and high tech consulting offerings.
<b>Satyam</b>	Being an innovative organization; clients in Fortune 500; deliver greater portion of services from offshore
<b>Tata</b>	Global Network Delivery Model™, Strategic Acquisitions and Integrated Full Services Play
<b>Wipro</b>	Vision 8x10; Significantly expand the Global IT Services and Products business; Scouting for selective acquisition of IT companies in Europe; Focus on services-led growth in the IT market in India; Brand equity; Wipro is trying to raise the value of its BPO services; Repositioning its consulting service line
<b>Sogeti</b>	Offshoring in the fields of projects & consulting as well as testing and outsourcing businesses

Source: annual reports, company websites, AME Research (for IBM and Ordina), CIC India

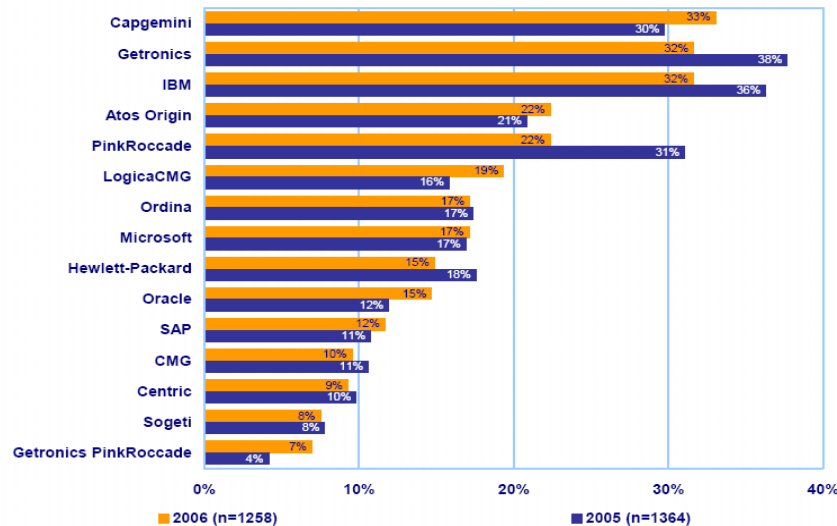
# 2006 revenue of Capgemini versus competitors in the financial services market according to Gartner

In percentages



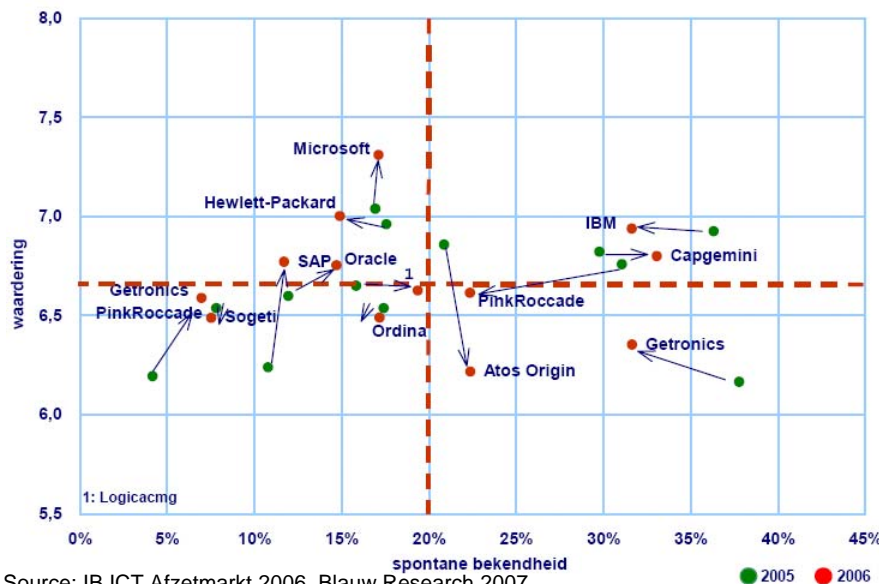
Source: Gartner – market view database 2007, mapped to Capgemini market sectors and segment definitions by sales directors

# Comparison of brain position and development of spontaneous brand recognition among top 15 professional service providers



### Spontaneous brand recognition

- Spontaneous brand recognition of Capgemini has increased, while most direct competitors decreased significantly; only LogicaCMG grew with 3%
- Because Getronics and PinkRoccade have merged their separate figures are decreasing; the new brand GetronicsPinkRoccade is increasing, but low
- HP, especially under IT managers, has a low spontaneous brand recognition



### Brain position in professional services market

- IBM and Capgemini hold the best brain position. Microsoft and HP both have a good appreciation, but spontaneous brand recognition is below average
- Capgemini's appreciation among IT managers (6.9) is higher than among business managers (6.6)
- Sogeti's appreciation is below average, and brand recognition is low; no major change versus last year

Source: IB ICT Afzetmarkt 2006, Blauw Research 2007

# We see a shortage on the labour market, most noticeably for young professionals

## Major shifts

- Shortage on the labour market, most noticeably with young talent.
- The absolute number of people with a technical profile is declining.
- Shift towards India due to our demographic development.

## Future changes in demand

- Work-life balance
  - No more long travelling time/hours
  - Part-time work
- Terms of employment
- Acknowledgement / approval / personal and professional attention becomes more important
- Sort of job: content and responsibility

## Future focus areas

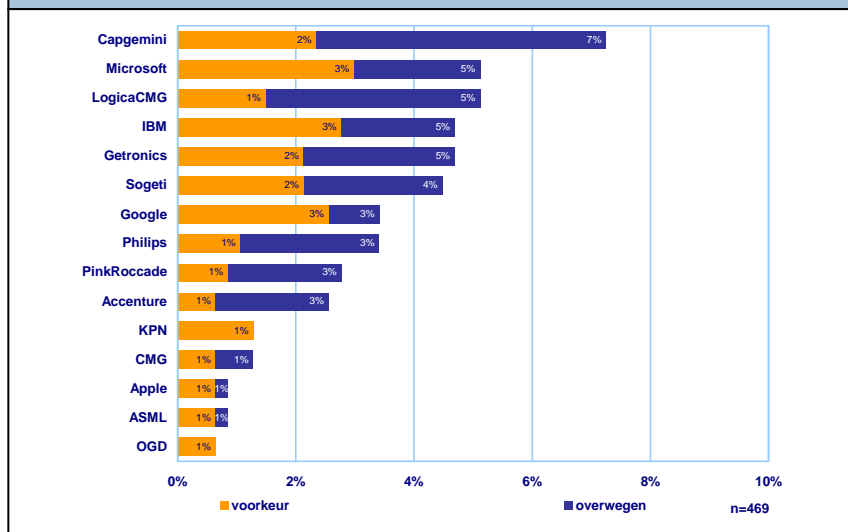
- Make a choice in focus point and make that visible in our labour market communication.
- Improve retention
- Ensure higher conversion ratio applicants versus new staff.
- Improve diversity

## Facts

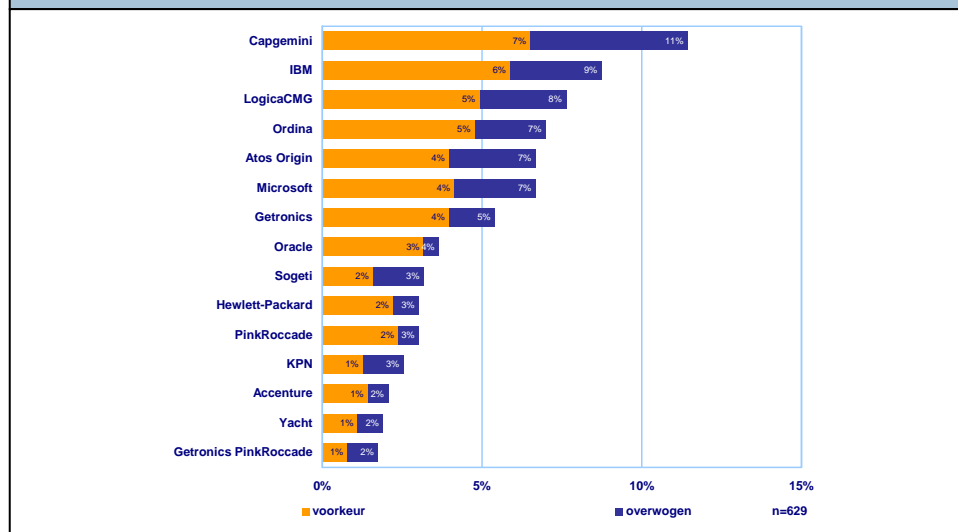
- Our main competitors are
  - Niche players in a more technical environment
  - Small companies that provide more of a home base
  - Freelancers
- Competitive advantages
  - Good brand awareness / reputation
- Competitive disadvantage Capgemini
  - For business consultants we are too much an IT company and to technology consultancy staff we are too much of a consultancy firm
  - Low involvement
  - Lower salary pay than freelancer

# Capgemini also holds absolute preference in the Dutch ICT labour market

### Absolute preference and consideration level among students



### Absolute preference and consideration level among ICT Professionals



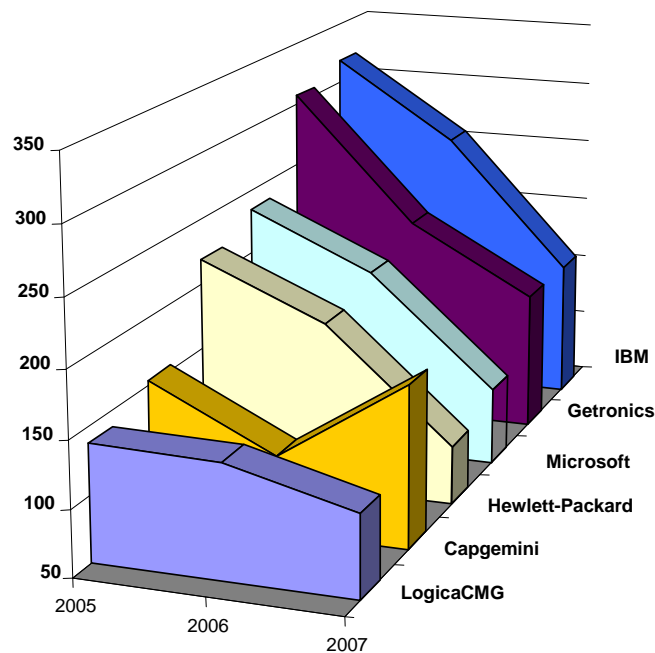
## Facts

- Students are most positive on 'trust' and 'respectful name' as indicators for the reputation of an organization. Beside these, Capgemini is also valued for career and training possibilities, development possibilities and interesting roles & functions
- ICT professionals are most positive on career possibilities, entrepreneurship, the possibility to manage your own working hours, training possibilities, and terms of employment
- Students are less positive on the future work climate than professionals. 75% of the professionals expect a favorable work climate.
- Capgemini is also the winner of the 'Gouden Spreekbuis 2007' by ICT Professionals. The 'Gouden Spreekbuis' is given to the company that scores best in comparison to the previous year

Source: Imago Blauwdruk ICT arbeidsmarkt module studenten and module professionals 2007; Blauw 2007

# Where in 2006 every other IT company is declining in attraction for *employees*, *business partners* and *investors*, Capgemini shows a clear upward trend

## Image development in the IT sector<sup>1</sup>



## Incompany

- **Incompany 500: 500 top companies with best image in Dutch market<sup>2</sup>**
  - Overall position is 32<sup>nd</sup>, which is the best in our sector
  - All IT-related companies decline in attractiveness except Capgemini – we rise in every segment. The biggest rise is in business partner (52<sup>nd</sup> -> 26<sup>th</sup>) and employer (40<sup>th</sup> -> 19<sup>th</sup>)
  - Capgemini is the most attractive employer in the Dutch IT sector
- **Incompany 200: satisfaction of employees in big Dutch companies<sup>3</sup>**
  - Second year in a row: highest employee satisfaction
  - In the overall score Capgemini ranks number 4 behind Ernst & Young, Interpolis and Rabobank with the following sub-positions:
    - 2<sup>nd</sup> in position/job
    - 3<sup>rd</sup> career
    - 6<sup>th</sup> culture
    - 15<sup>th</sup> terms of employment

Source: 1. Research Incompany / Blauw, Image development in the IT sector, 2007, 2. Incompany 500 - 2007, 3. Incompany 200 - 2006



# In the category large companies, Capgemini has won the Effactory Award 2006

	2005	2006	Average 2006
<b>General satisfaction</b>	2.56	2.21	2.19
<b>Kind of projects</b>	2.42	2.31	2.17
<b>Working conditions</b>	2.55	2.31	2.35
<b>Colleagues</b>	2.02	1.95	1.99
<b>Manager</b>	2.55	2.31	2.39
<b>Organisation</b>	2.45	2.09	2.27
<b>Development possibilities</b>	2.62	2.38	2.65
<b>Reward</b>	3.44	3.19	2.83
<b>Employees Council</b>	3.16	3.05	2.74

## Facts

- **Increased satisfaction in every area!**  
Capgemini is distinguishing in:
  - Development possibilities
  - Professionalism
  - Teamwork with colleagues
- **Continue to pay attention to:**
  - A more positive view of Capgemini (policy and appreciation)
  - Projects in line with ambition
  - Career development
  - Competitive terms of employment

***We won the Effactory Award 2006 for achieving the strongest growth in employee satisfaction compared to other large companies in The Netherlands.***

Source: Effactory – 2006, based on Medewerkertevredenheidsonderzoek Capgemini, april 2006

Note: The scale is from 1-5 in which 1 is 'I absolutely agree' and 5 'I do not agree'

# Of all the Capgemini competitors SWOT analyses were made

## Deloitte Consulting

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Experience in the consumer goods, public, life sciences and healthcare sectors.</li> <li>• Historically strong SAP practice that is driving growth for the company</li> <li>• Security and compliance practice (was also a strong partner of Versa, the acquired solution for SAP's new GRC practice)</li> </ul>	<ul style="list-style-type: none"> <li>• Declining revenues from Enterprise Applications</li> <li>• Declining IT business</li> <li>• Unsubstantial outsourcing business</li> <li>• Uncertainties around Deloitte's IT strategy in the long term</li> <li>• Lack of technology innovation/R&amp;D compared to larger competitors</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Transfer of IT staff to lower-cost offshore facilities</li> <li>• Expansion of IT partner network to create new opportunities</li> <li>• Growth of SAP in the U.S . - The new SAP All-in-One product and strategy in 2007 could give an added boost to Deloitte</li> </ul>	<ul style="list-style-type: none"> <li>• Competition for lower-value IT services from offshore players</li> <li>• Competition from more IT-focused consulting companies</li> <li>• Lack of a true outsourcing business can exclude the company from the large transformational strategies employed by competitors who also have a consulting lead.</li> <li>• Long-term strategy for IT services practice?</li> </ul>

## Sogeti

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Sogeti operates in a decentralized and entrepreneurial way, while at the same time joining forces on an informal international network.</li> <li>• Simple, clear and stable organization</li> <li>• Part of the international Capgemini organization; exchange of knowledge and experience.</li> <li>• Strong local presence</li> <li>• Strong bond with employees and clients</li> <li>• Flexible and entrepreneurial way of working</li> </ul>	<ul style="list-style-type: none"> <li>• Only two global strategic alliances. i.e. Microsoft and IBM.</li> <li>• Internal competition with Capgemini</li> <li>• No global coverage</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Testing, architecture services and OS Am are hot offerings</li> <li>• Strong image as attracts qualified staff</li> </ul>	<ul style="list-style-type: none"> <li>• Competition for lower-value IT services from offshore players</li> </ul>

*Dit zijn slechts twee van de veertien analyses*

Source: Sitsi, Deloitte UK, January 2007, Talent, sogeti.nl