“If the rate of change on the outside

exceeds

the rate of change on the inside

the End is Near...”

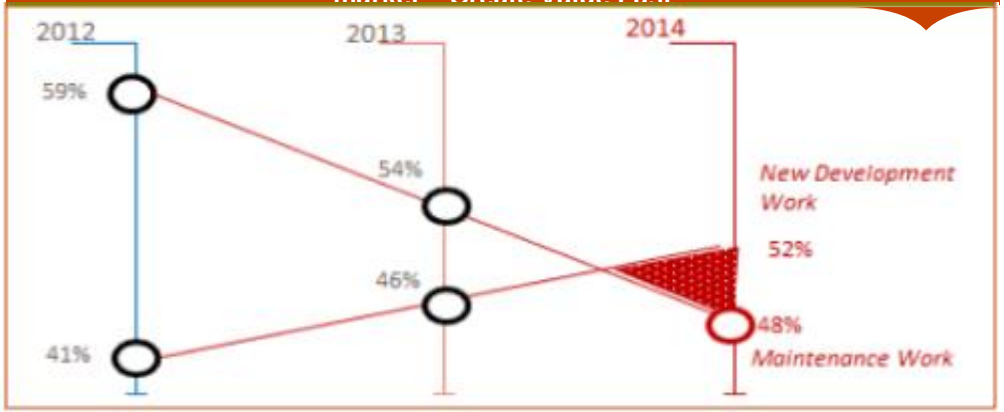
-Jack Welch-

Stop Testing
Secure my Quality!

Global QA & Testing Marketplace

Industrialization, DevOps and SMACT differentiation

QA & Testing Budgets allocated to new development requires speed to market – Create Value Fast



Analyst conclusions

- MTS deals + 17 % YoY
- Projects + 11% YoY
- Staff aug. + 8% YoY
- Large growth: Sectors spending in Testing
  - ✓ Financial Services (19%)
  - ✓ Energy & Utility (12%)
  - ✓ Retail and Logistics (10%)
- Fast growing Geographies in spending in Testing
  - ✓ NA at CAGR 14%, EMEA at CAGR 12 %

Testing Sector Growth

Specialized Testing	2013	2014	2015	2016	2017	2018
Financial services	15	19	19	19	19	19
Telecom	2	5	6	6	6	6
Technology vendors	0	2	2	2	2	2
Retail & logistics	6	10	10	10	10	10
Energy & utilities	10	12	12	12	12	12
Life & healthcare	5	9	9	9	9	9
Public sector	2	2	2	2	2	2
Manufacturing	4	7	7	7	7	7
Total (%)	**+7**	**+12**	**+13**	**+13**	**+13**	**+13**

Market observations

- Split between Legacy systems and differentiation
  - Legacy requires competitive industrialization
  - Differentiation requires SMACT
    - Dev., infra, Omni-channel & ALM skills
    - Short term ROI from assets & solutions
    - OnesShop environment, tooling and services solutions
- T&M market demands TA, DevOps and Digital skills
- QA and Test Automation is a key driver

*Sources: **Gartner-** Competitive Landscape: Application Testing Services, July 2013, **Nelson Hall** – Software Testing Market Assessment and Forecast, **April 2013 and Sept 2014**, **Everest Group** via IN,GS&P-Research, **WQR***

operational excellence
vs
differentiation

You are Checkmate by new technology

- Acceleration requires coordination -

Digital Transformation

- from Testing to Assuring Quality to Assuring Business-

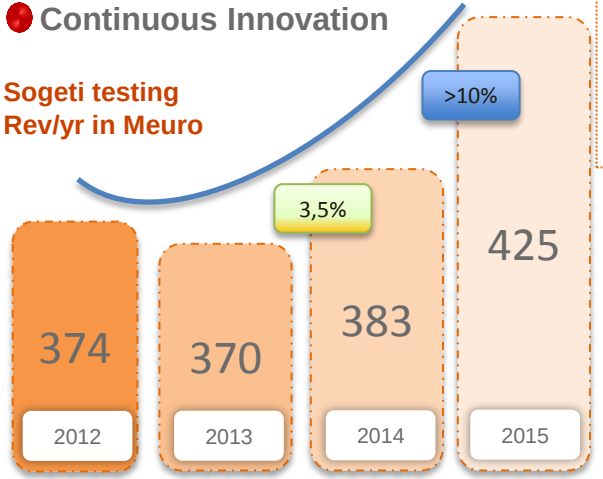
Straight to Target

- Shortcuts enabled by Shift Left and DevOps-

We got SMACT…

- World Leader inTesting and QA
- Best in Transformation
- Best in Class Methodology
- Strong US and Europe practices
- Impressive Offshore capabilities
- Continuous Innovation

Sogeti testing Rev/yr in Meuro



NelsonHall

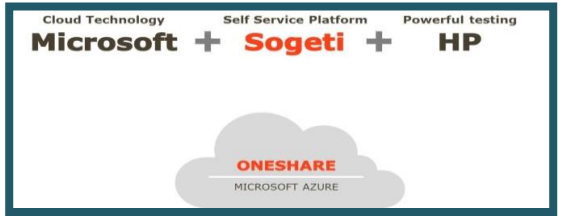
Q3 - 2014

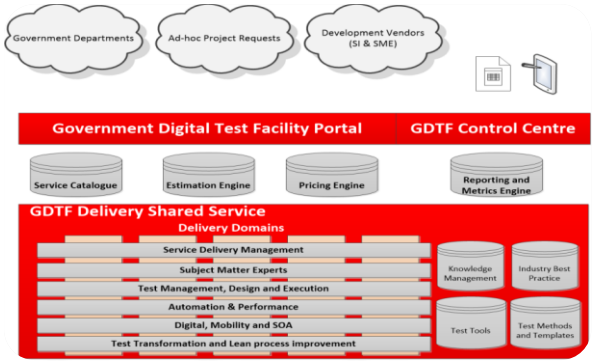
Gartner

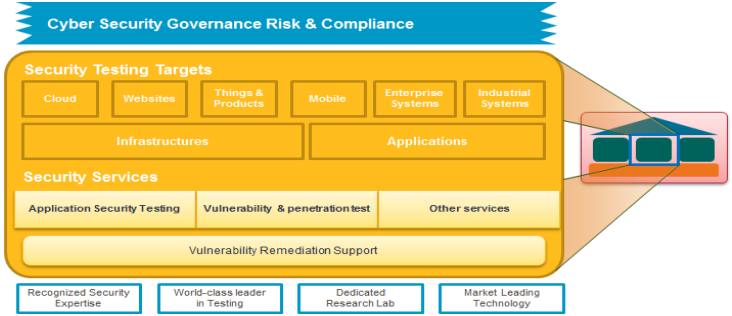
Q4 - 2014

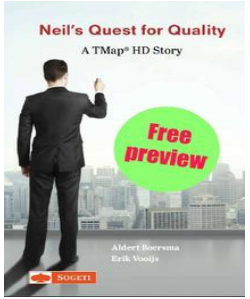
SOGETI

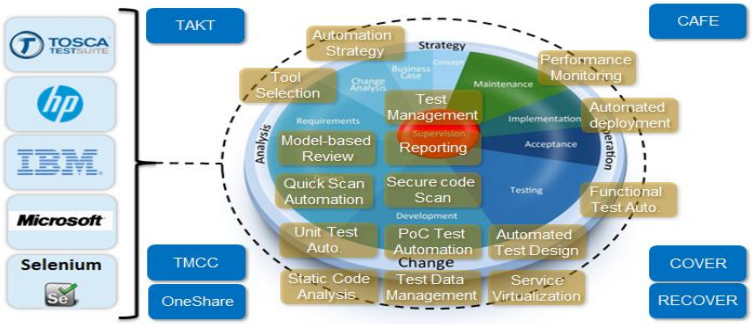
Relevancy to today‘s Digital World



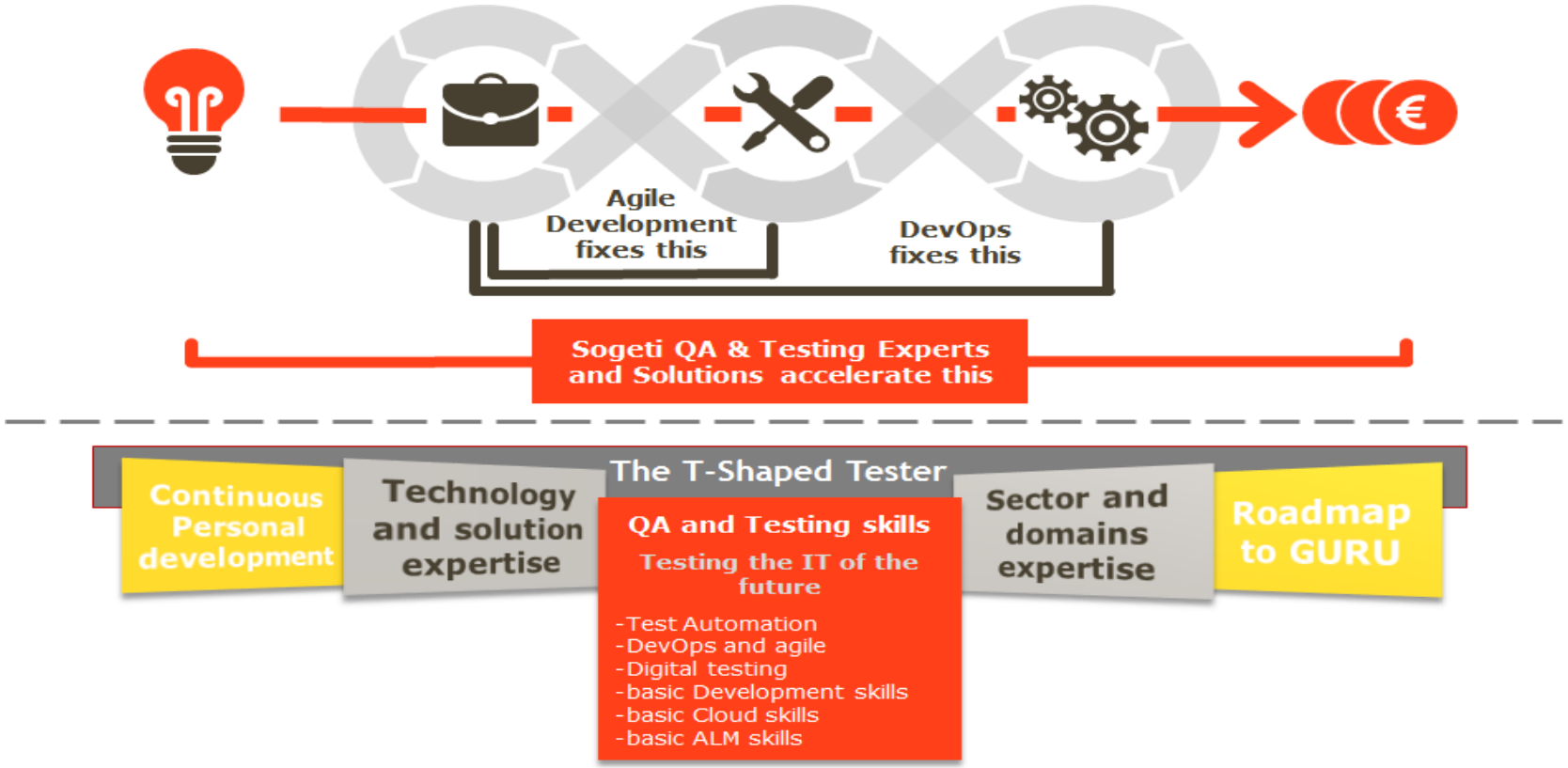








The Tester of the Future…



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