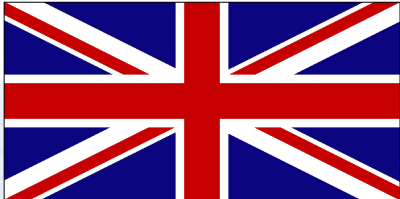


ORF SEE IT - Development of Regional Export Promotion Action Plan

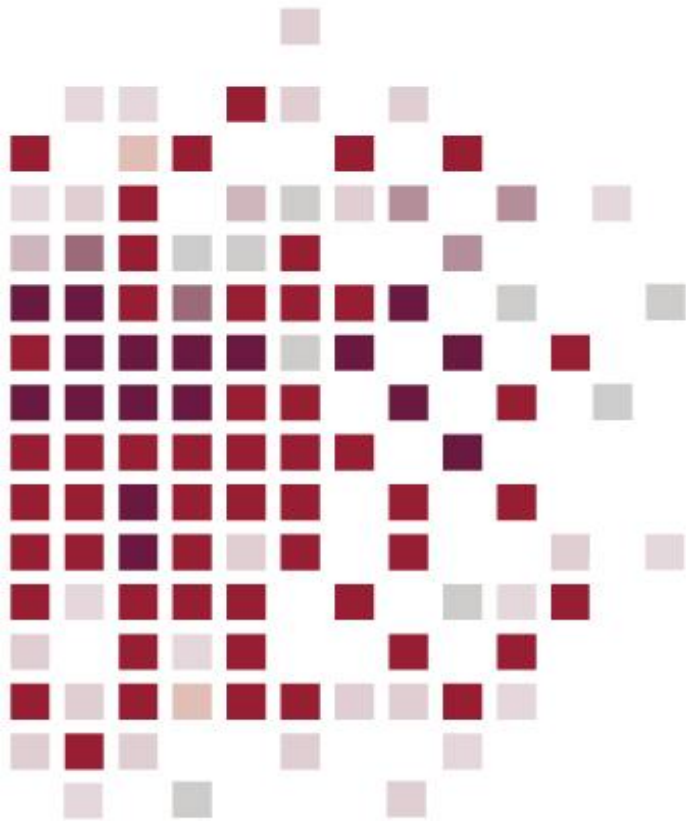
IT Market Analysis UK

April, 2014

IT Market Analysis UK



Agenda



- 1. ICT Market**
2. Software Market
3. IT Services Market
4. IT Outsourcing
5. Key Success Factors for Exporting

UK– Country Overview

UK- Key Economic Indicators			
	2010	2011	2012
Population (Mio)	62.3	62.8	63.2
GDP (Bn EUR)	1932.38	2125.90	2146.25
Real GDP/ Capita (EUR)	30500	30600	30200
GDP Growth	1.7	1.1	0.1
Trade Balance of Payments (%GDP)	-2.7	-1.5	-3.8
Inflation Rate	3.3	4.5	2.8
Unemployment Rate	7.8	8.0	7.9

Source: Eurostat, OECD, World Bank

UK – ICT market overview (1/5)

High share of IT Services and growing share of software

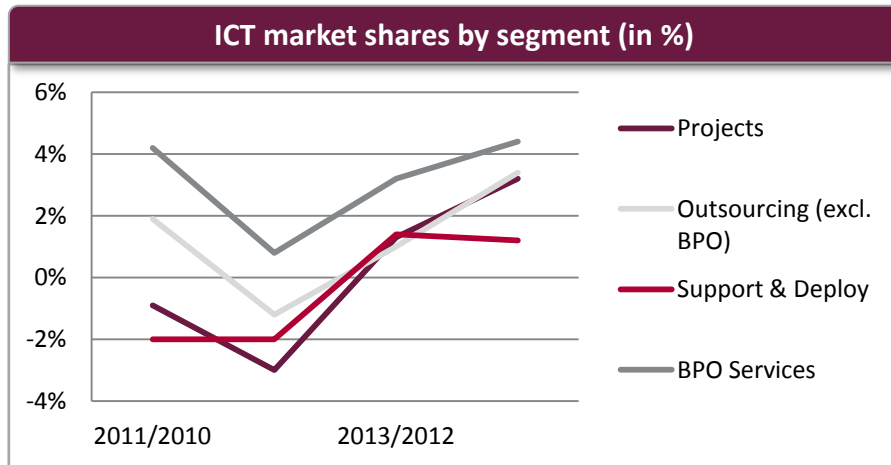
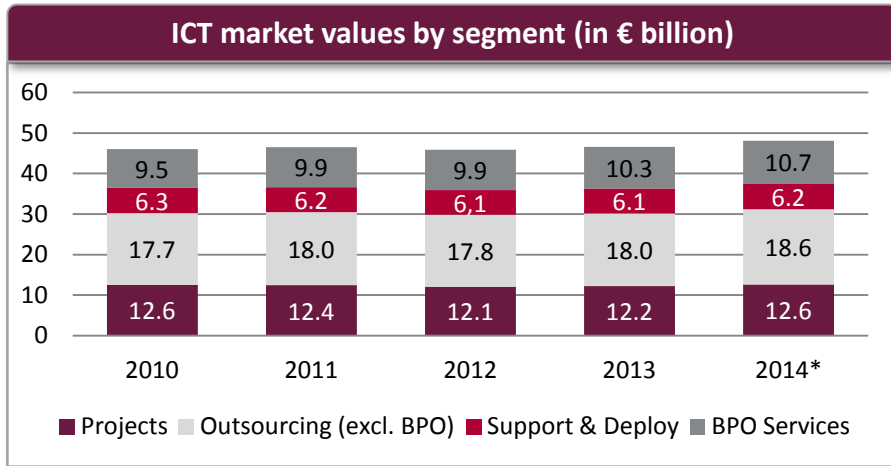
Total ICT market value by segment 2010 – 2014 (in € billion)					
Segment	2010	2011	2012	2013	2014*
IT Equipment	12.0	11.5	11.7	11.6	11.8
Software	13.6	14.1	14.8	15.7	16.6
IT Services	46.0	46.5	45.9	46.6	48.1
Telecommunication Equipment	12.9	13.7	15.9	16.5	17.1
Telecom Services	36.0	36.5	36.8	37.2	37.5
Total ICT	120.5	122.2	125.1	127.5	131.1
Total ICT market growth rates by segment 2011 – 2014 (in %)					
Segment	2011	2012	2013	2014*	
IT Equipment	-4.6%	2.1%	-1.1%	2.0%	
Software	3.3%	5.2%	5.8%	5.6%	
IT Services	1.1%	-1.4%	1.6%	3.3%	
Telecommunication Equipment	6.4%	16.0%	4.1%	3.3%	
Telecom Services	1.4%	1.0%	0.9%	1.0%	
Total ICT	1.4%	2.4%	2.0%	2.8%	

Source: EITO 2013

*Estimated values

UK – ICT market overview (2/5)

ICT market recovered from a drop in 2011/12 – Outsourcing as a growth driver



- Overview**
- **ICT industry accounts for 8% (€88 billion) of the UK's total Gross Value Added (GVA)**

 - Economic contribution of the internet is worth an estimated € 117 billion to the UK economy
 - It is further estimated that the ICT driven GVA uplift of €55 billion in the UK economy could translate into **half a million new jobs**, across many occupations and sectors, over the **next 5 to 7 years**
 - There are over **144,000 firms**: 87% of which are IT and 13% Telecoms

 - vast majority of these (**90%**) are **services oriented**, and a significant proportion (45%) are located in London and the South East of England
 - micro firms make up 93% of IT & Telecoms workplaces, but only employ just 28% of the sector workforce
 - There are **1.5 million people working in IT & Telecoms in the UK** (5% of the working population)

 - Of these individuals, 913,000 (59%) work in the IT & Telecoms industry itself, whilst a further 633,000 (41%) work as IT or Telecoms professionals in other industries

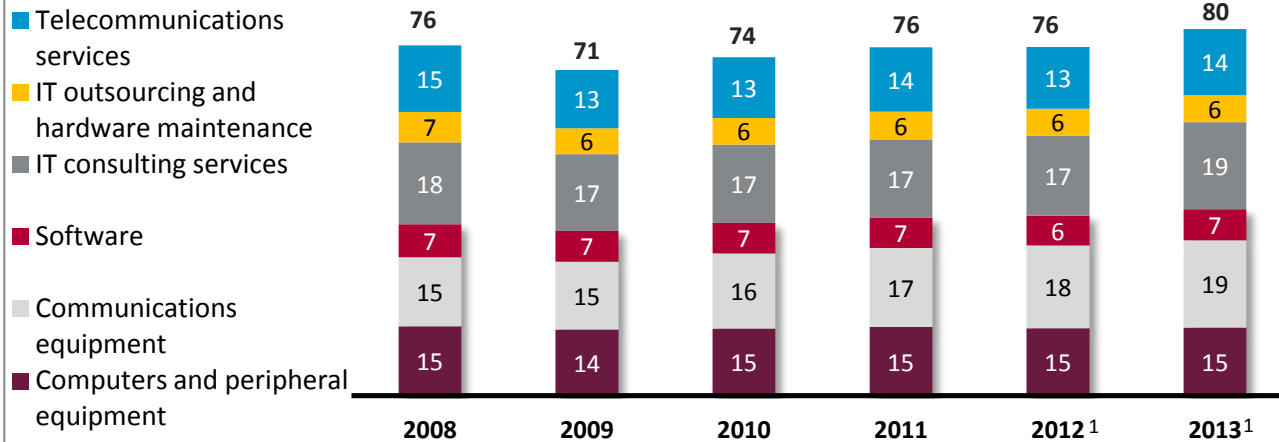
Source: EITO 2013, Technology Insights 2012

UK – ICT market overview (3/5)

Europe's 2nd largest tech market will stay conservative regarding tech purchases throughout 2013

UK business and government Purchases of ICT Goods and Services, (EUR b)

UK ICT purchases (EUR b) showed no growth in 2012, then was expected to expand by 5% in 2013



% change from prior year

Computers and peripheral equipment	-2%	-13%	4%	7%	-4%	6%
Communications equipment	-4%	-15%	2%	5%	-3%	1%
Software	3%	-7%	3%	-1%	2%	9%
IT consulting services	14%	-6%	-1%	0%	-2%	4%
IT outsourcing and hardware maintenance	23%	-2%	10%	5%	5%	5%
Telecommunications services	-1%	-5%	2%	2%	-2%	1%
Total ICT purchases	5%	-7%	4%	3%	0%	5%

- The UK tech market stagnated in 2012, with a growth rate of -0.3%
- **UK firms spend heavily on software and third-party IT services**
 - **By industry, UK financial services and public sector firms spend the most on IT staff, while retailers and wholesalers spend the most on software and on third-party IT services**
- **UK firms' adoption of advanced technology lags behind Germany**

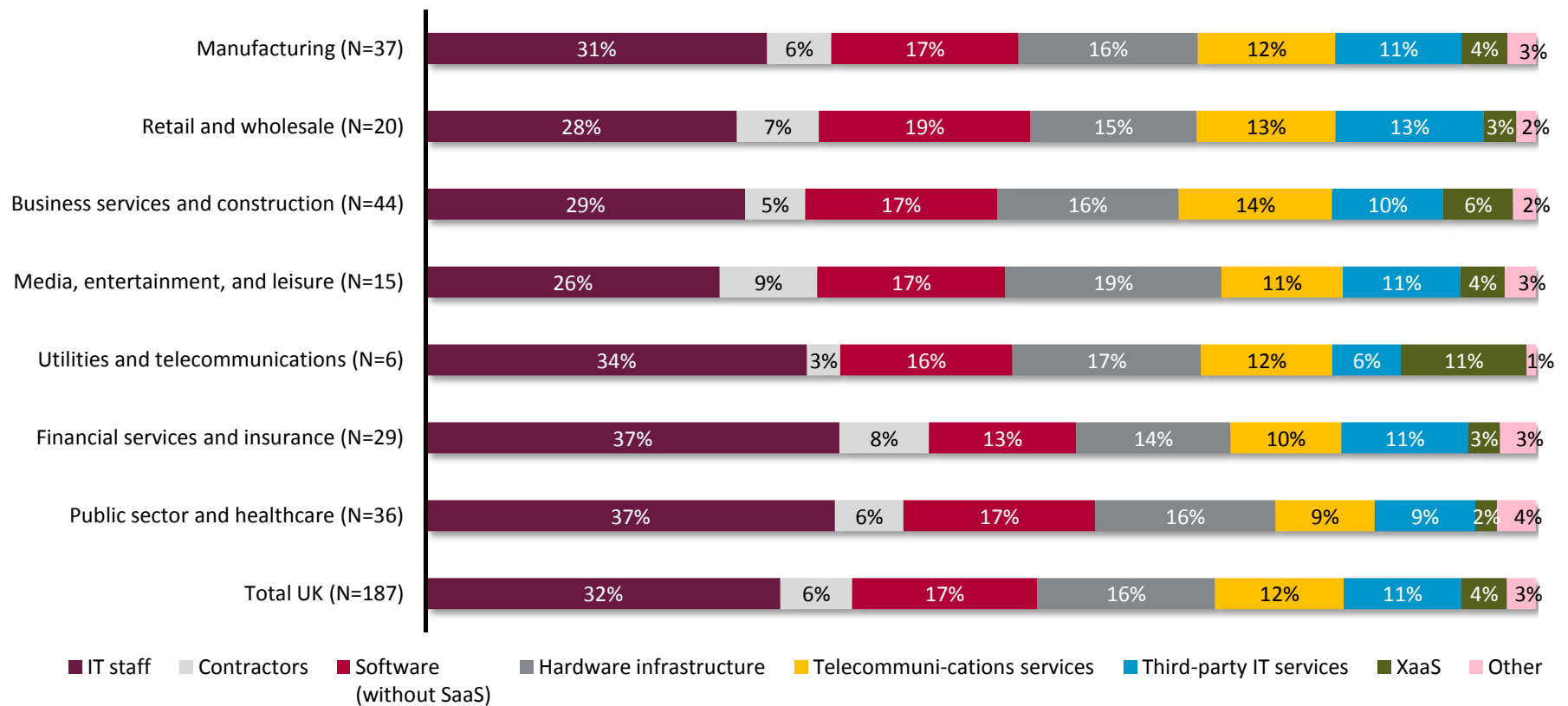
1. Forrester Forecast
Source: European ICT report, Forrester, 2012

UK – ICT market overview (4/5)

UK retailers / wholesalers spend the most on IT Software and IT Services

Division of Services by Sector (2011)

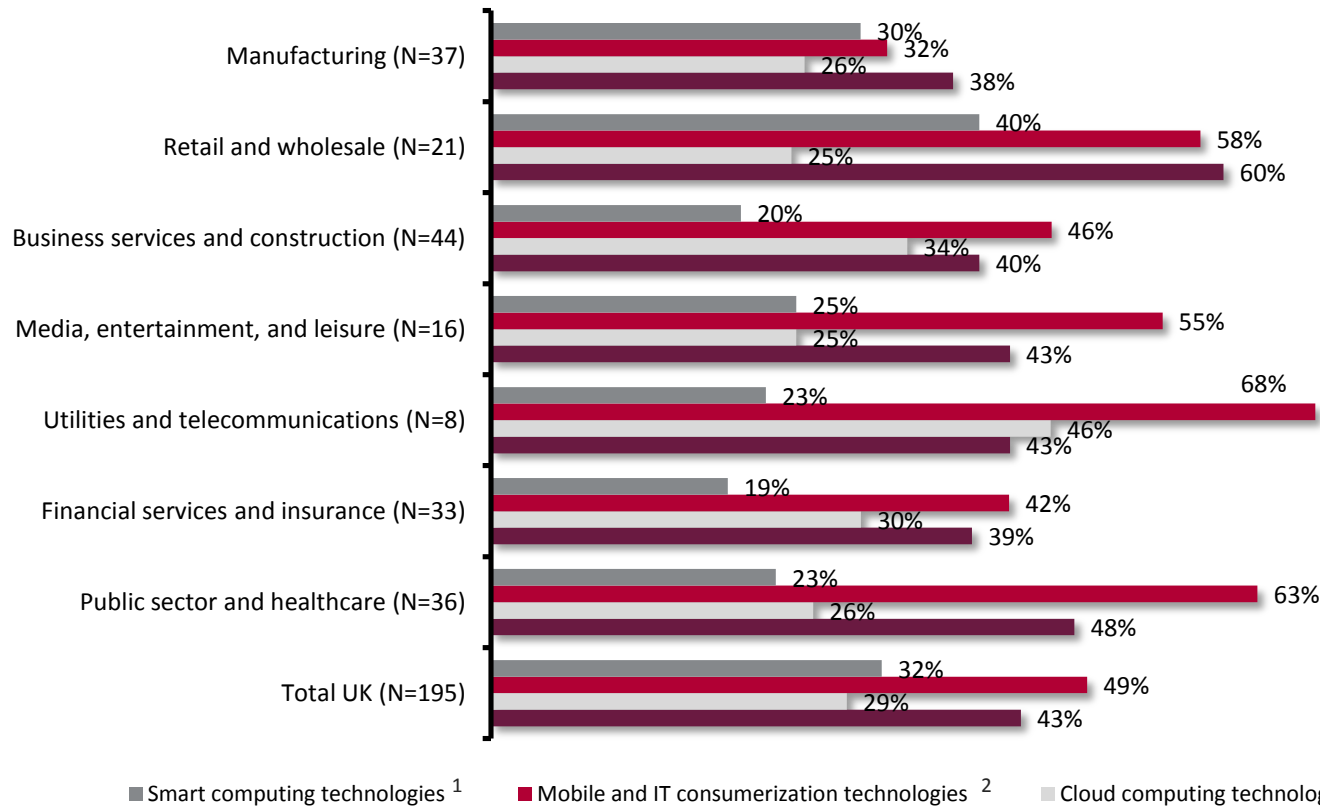
UK industry ICT distribution by category (percentage of total ICT budget)



Source: Forrester Budgets And Priorities Tracker Survey, Q4 2011

UK's Utilities & Telecom sector leads in adopting Mobile & IT consumerization technologies

Adoption of Technology by Sector, 2011



1. Sensors, RFID, or other machine-to-machine technologies; real-time predictive business and customer analytics; and social intelligence tools for monitoring what customers are saying; big data solutions; and business process management tools

2. Mobile applications; enterprise social networking tools; enterprise apps store solutions to deploy and manage smartphone and tablet applications; customer communication management; and deploying smartphones/tablets for employees

3. Software-as-a-service for horizontal business processes like CRM and HR; software-as-a-service for industry-specific processes; software-as-a-service for collaboration or email-as-a-service; infrastructure-as-a-service; data/business intelligence-as-a-service; and business-process-as-a-service

4. Packaged applications implementation or upgrade; enterprise marketing platforms; web analytics; content management software; and loyalty management platforms

Source: European ICT report, Forrester, 2012

UK – ICT Market key market trends (1/2)

Cloud computing, as well as mobile computing and applications as key expansions approaches

- Ca. 34% of all ICT firms expect a reduction of internal resources for helpdesk / support services
 - Same trend for external resources → helpdesk / support services as a diminishing aspect in UK's ICT industry
- Database activities and integration will attract more internal resources in most firms (ca. 80%)
- **External activities of increasing importance are:** networking / communications (39%), database activities (81%), storage / backups (49%), integration (81%), and security related activities (38%)
- **Key expansion approaches to specific technologies / processes are:** cloud computing (81%), mobile computing / applications (58%), and IT offshoring (32%)
- Majority of firms anticipates **stable spending patterns** for ICT staffing, hardware, software, outsourcing and services
 - Almost one third anticipates increase in spending in the areas of ICT hardware and software

Source: Technology Insights 2012

UK – ICT Market key market trends (2/2)

Trend areas and sought-after skills

- **Security and data protection**

- ICT professionals will need skills to develop integrated security solutions, and to manage risk

- Innovation

- **Cloud computing**

- promises to speed application deployment, increase innovation and lower costs - all while increasing business agility
- Project and integrated solutions management skills are required to realize these potential advantages

- Communication & IT convergence and integration

- Patterns of work and collaboration are changing as communications, devices and applications are integrating more into day to day work
- Security maintenance skills will be the main priority for employers, following by technical expertise in the new technologies

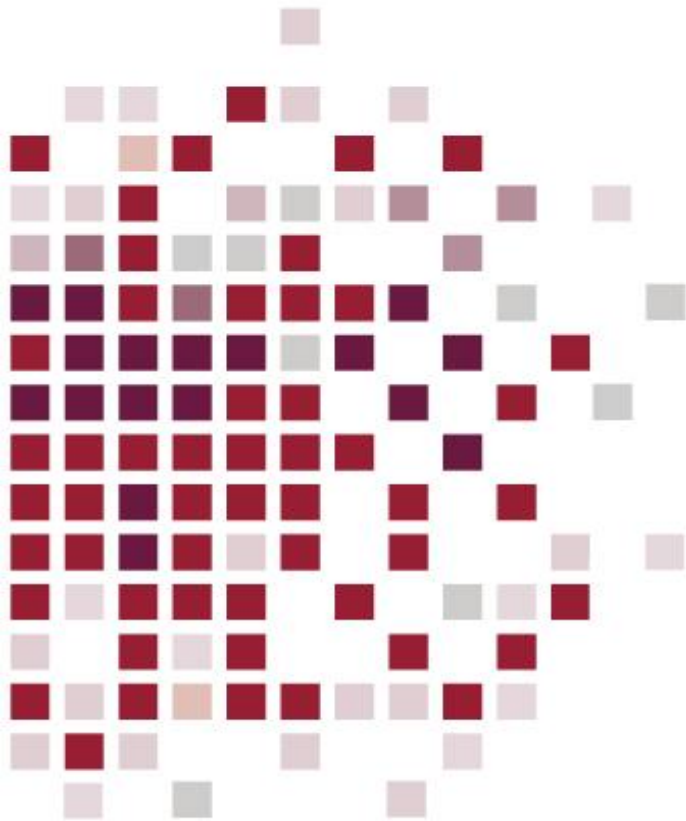
- Real world web

- real time content and reacting to the surrounding world

- Developing issues are: Green IT, transformation through IT, **information & analytics**, reshaping the data centre, borderless business, digital natives, consumerization of IT

Source: Technology Insights 2012

Agenda



1. ICT Market
2. **Software Market**
3. IT Services Market
4. IT Outsourcing
5. Key Success Factors for Exporting

UK – Software market overview (1/3)

Strong growth of Applications D&D – Both Applications segments account for ¾ of total market value

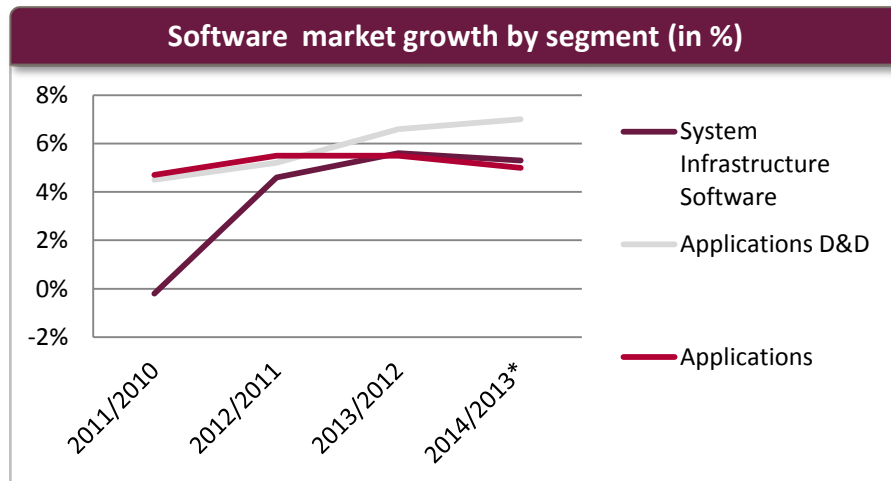
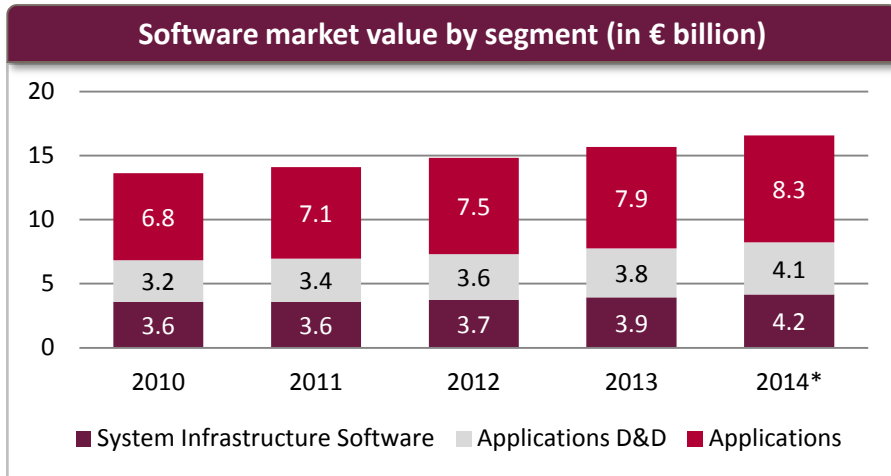
Total software market value by segment 2010 – 2014 (in € billion)					
Segment	2010	2011	2012	2013	2014*
System Infrastructure Software	3.6	3.6	3.7	3.9	4.2
Applications D&D	3.2	3.4	3.6	3.8	4.1
Applications	6.8	7.1	7.5	7.9	8.3
Total software	13.6	14.1	14.8	15.7	16.6
Total software market growth rates by segment 2011 – 2014 (in %)					
Segment	2011	2012	2013	2014*	
System Infrastructure Software	-0.2%	4.6%	5.6%	5.3%	
Applications D&D	4.5%	5.2%	6.6%	7.0%	
Applications	4.7%	5.5%	5.5%	5.0%	
Total software	3.3%	5.2%	5.8%	5.6%	

Source: EITO 2013

*Estimated values

UK – Software market overview (2/3)

Total software market expected to accelerate growth until 2016



Overview

- Market value:
 - The UK software market had total revenues of EUR 15.7 billion in 2013, representing a compound annual growth rate (CAGR) of 2.2% between 2007 and 2011
 - **The software market declined in 2009 but has since recovered to post moderate growth and is expected to continue in the medium term, with further moderate growth forecast through to 2016**
- Market value forecast:
 - **The performance of the market is forecasted to accelerate, with an anticipated CAGR of 5.8% for the five-year period 2011 – 2016**
 - **Software market as key segment of the whole ICT market regarding its growth potential**

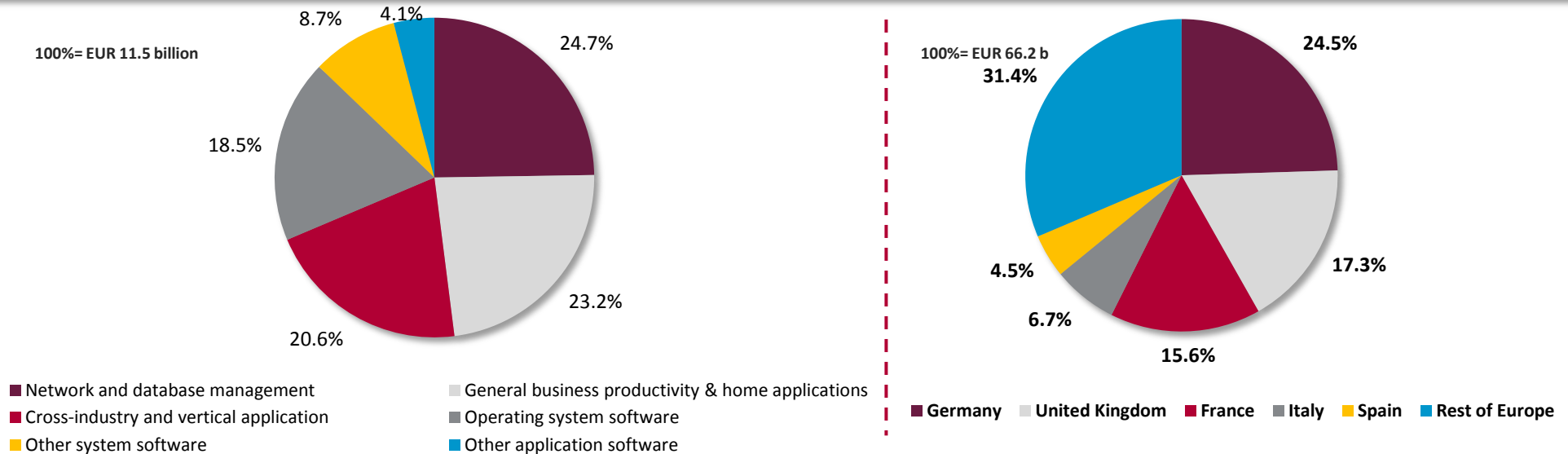
Source: EITO 2013, Software in UK, Marketline, 2012

*Estimated values

UK – Software market overview (3/3)

Network and database management was the market's most lucrative segment in 2011

Software market segmentation by category (2011, in %) and geography (2011, in %)



Category segmentation

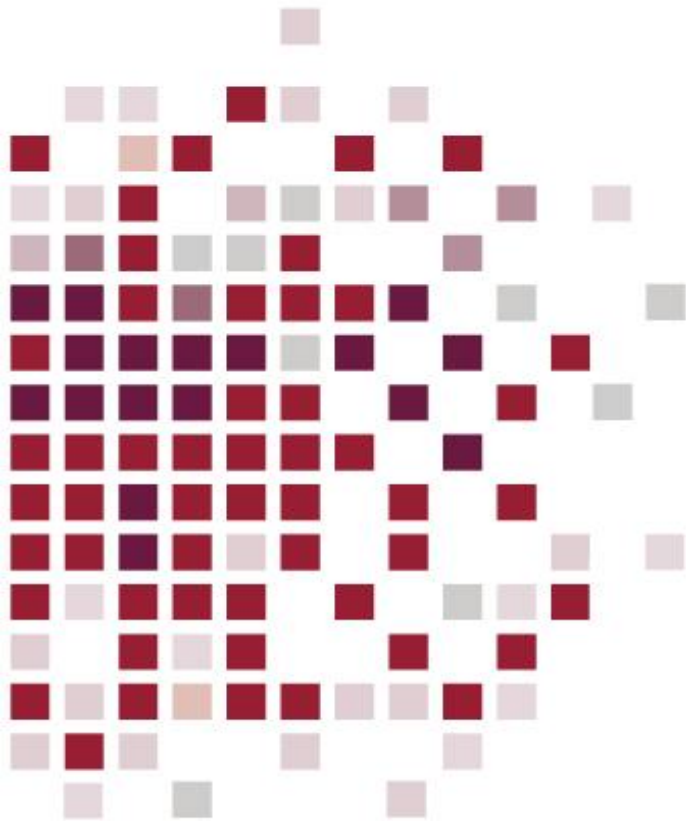
- The network and database management segment was the market's most lucrative in 2011, with total revenues of EUR 2.8 billion, equivalent to 24.7% of the market's overall value
- The general business productivity and home use applications segment contributed revenues of EUR 2.7 billion in 2011, equating to 23.2% of the market's aggregate value

Geography segmentation

- The United Kingdom accounts for 17.3% of the European software market value

Source: Software in UK, Marketline, 2012

Agenda



1. ICT Market
2. Software Market
3. **IT Services Market**
4. IT Outsourcing
5. Key Success Factors for Exporting

UK – IT Services market overview (1/3)

Support & Deploy only plays a minor role – Outsourcing (excl. BPO) is the largest segment

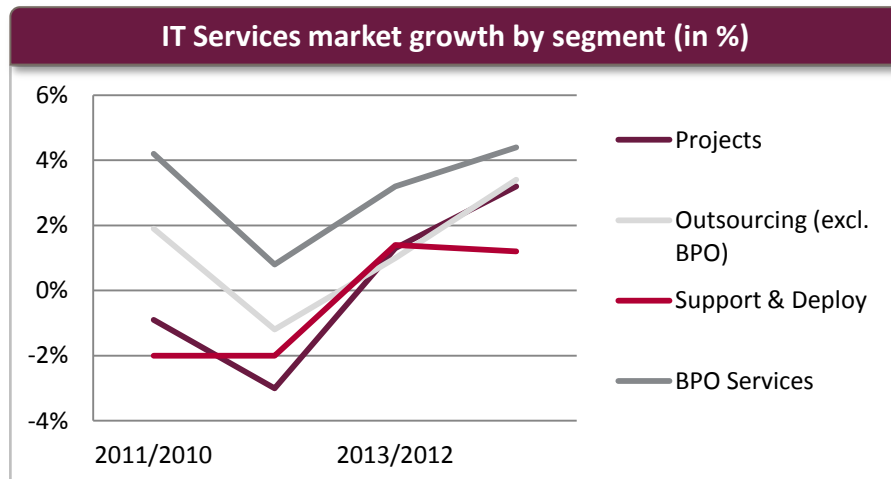
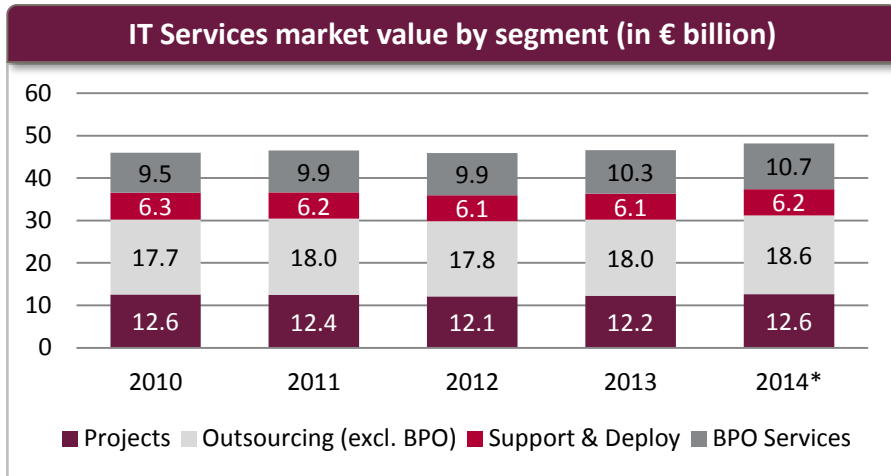
Total IT Services market value by segment 2010 – 2014 (in € billion)					
Segment	2010	2011	2012	2013	2014*
Projects	12.6	12.4	12.1	12.2	12.6
Outsourcing (excl. BPO)	17.7	18.0	17.8	18.0	18.6
Support & Deploy	6.3	6.2	6.1	6.1	6.2
BPO Services	9.5	9.9	9.9	10.3	10.7
Total IT Services	46.0	46.5	45.9	46.6	48.1
Total IT Services market growth rates by segment 2011 – 2014 (in %)					
Segment	2011	2012	2013	2014*	
Projects	-0.9%	-3.0%	1.3%	3.2%	
Outsourcing (excl. BPO)	1.9%	-1.2%	1.0%	3.4%	
Support & Deploy	-2.0%	-2.0%	1.4%	1.2%	
BPO Services	4.2%	0.8%	3.2%	4.4%	
Total IT Services	1.1%	-1.4%	1.6%	3.3%	

Source: EITO 2013

*Estimated values

UK – IT Services market overview (2/3)

IT Services market faces moderate growth and a significant internal skills shortage



Overview

- IT Services market contracted in 2012, with BPO showing the only gains, but is expected to turn around, with BPO Services again leading a rise in demand across all areas
- Despite the economic situation, **pockets of growth** remain:
 - Cloud services, IT consumerization, unified communications, mobility, application consolidation
- IT Services growth drivers for IT Outsourcing:
 - **Cost reduction:** UK businesses continue to invest in consulting projects that can deliver a short-term return on investment and / or reduction in operating costs
 - **Internal skills shortage:** Many UK companies have slimmed down their internal IT teams in response to the economic slowdown and **will be increasingly reliant on external resources** to support new projects once budget becomes available
 - **Public sector transformation:** Major structural changes are taking place in the way that UK public services including healthcare and tax credits are delivered. This is creating major opportunities in both business process and IT consulting

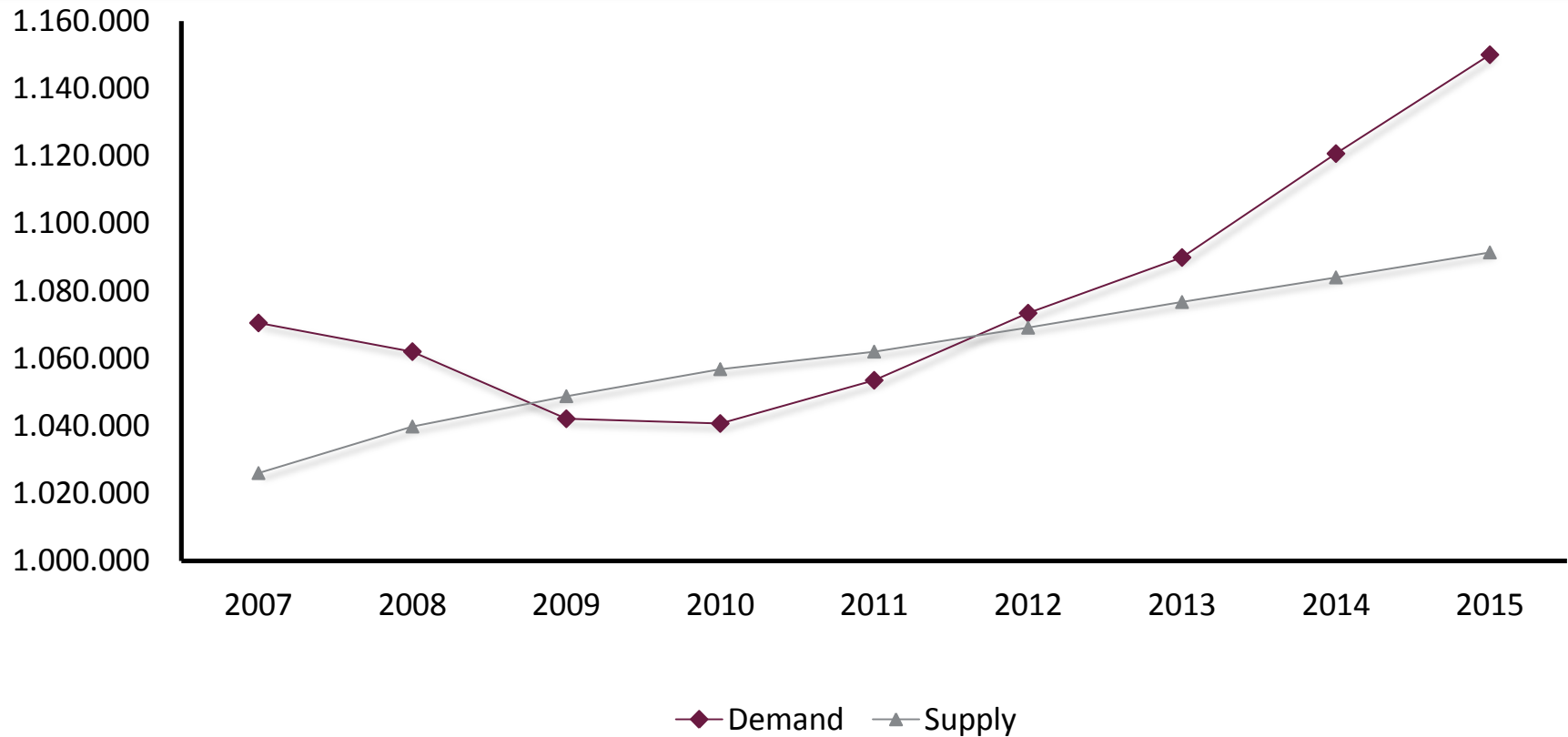
Source: EITO 2013, PAC Europe IT Services, 2011

*Estimated values

UK – IT Services market overview (3/3)

E-Skills shortage concerning required skills for supporting the ICT market

e-Skills Demand Supply Forecast - United Kingdom



Source: Capgemini Consulting Analysis

UK – IT Services key market trends

Falling rates and innovative business models as key market trends

Budget cuts to control costs

- Spending on both project services and outsourcing suffered since the economic downturn of 2007-2009
- Discretionary budgets were frozen or slashed, and only projects that would give a short-term return on investment received board approval

Lowered go-to market rates

- The massive budget pressure facing both commercial and public sector organizations during the last three years has forced suppliers to lower their rates
- **A combination of increased use of technology tools to boost efficiency and low-cost offshore resources**

Innovative business models

- **Global delivery has become a standard component of the majority of large IT Services engagements in the UK private sector, and it is also increasingly being used in the public sector**
- **As a valuable way to support efficiency improvement programs**

Renewal at discounted rates

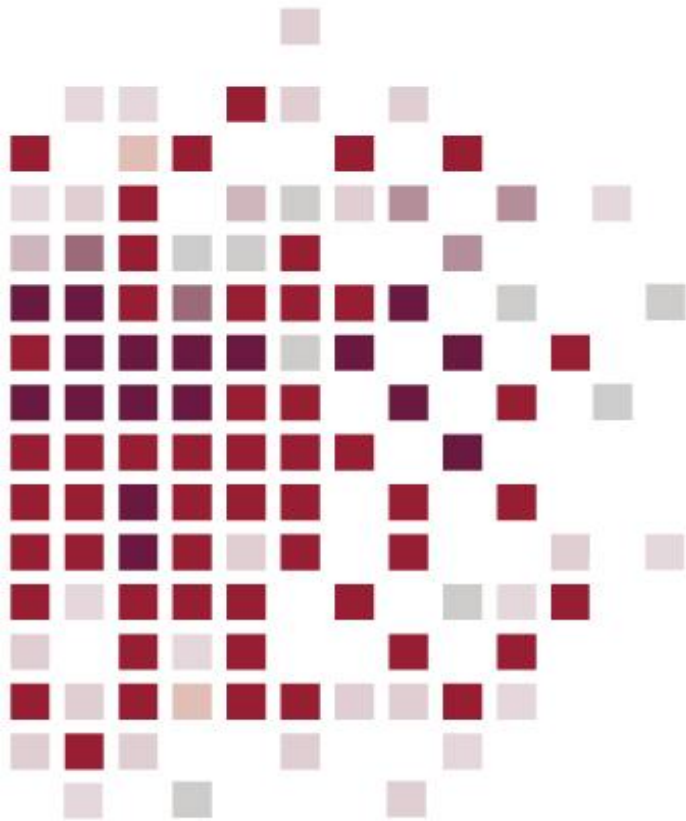
- Outsourcing contracts are being renewed or extended at substantially discounted rates
- Buyers expect suppliers to review their approach to supporting their requirements in line with their budget reductions

Standardization of IT Services

- This reduction in rates has now become the norm; they are not going to bounce back to pre-2005 levels
- Suppliers are working to protect their margins by industrializing their services through centralization, standardization and automation

Source: Capgemini Consulting Analysis

Agenda



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4. **IT Outsourcing**
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UK – IT Outsourcing market value by segments (in € million)

Segments & Sub-segments			2010	2011	2012	2013	2014*	2015*	2016*
Cloud Services	Infrastructure as a Service (IaaS)	Cloud Compute Services	91	126	194	280	422	578	694
		Cloud Print Services	3	3	4	5	5	6	7
		Storage as a Service	82	91	121	176	233	299	372
Total (Cloud Services)			176	220	319	461	661	883	1,073
Infrastructure Outsourcing	Data Center Outsourcing	Data Center Outsourcing	6,500	6,408	6,700	6,740	6,784	6,805	6,825
	End User Device Outsourcing	Desktop	2,469	2,387	2,486	2,500	2,500	2,492	2,474
		Mobile	138	265	334	396	462	520	571
	Enterprise Network Outsourcing		3,868	3,850	4,066	4,168	4,286	4,411	4,539
	Help Desk Outsourcing		477	480	506	516	529	544	556
	Infrastructure Utility Services		823	1,071	1,308	1,559	1,883	2,296	2,779
Total (Infrastructure Outsourcing)			14,276	14,461	15,399	15,880	16,444	17,067	17,744
Applications Outsourcing	Commercial Application Outsourcing		1,235	1,252	1,328	1,364	1,407	1,453	1,500
	Custom Application Outsourcing		774	755	799	818	844	870	897
Total (Applications Outsourcing)			2,008	2,008	2,127	2,183	2,250	2,323	2,397
Total (IT Outsourcing)			16,460	16,689	17,845	18,523	19,355	20,273	21,213

Source: Gartner 2013

*Estimated values

UK – IT Outsourcing market growth by segments (in %)

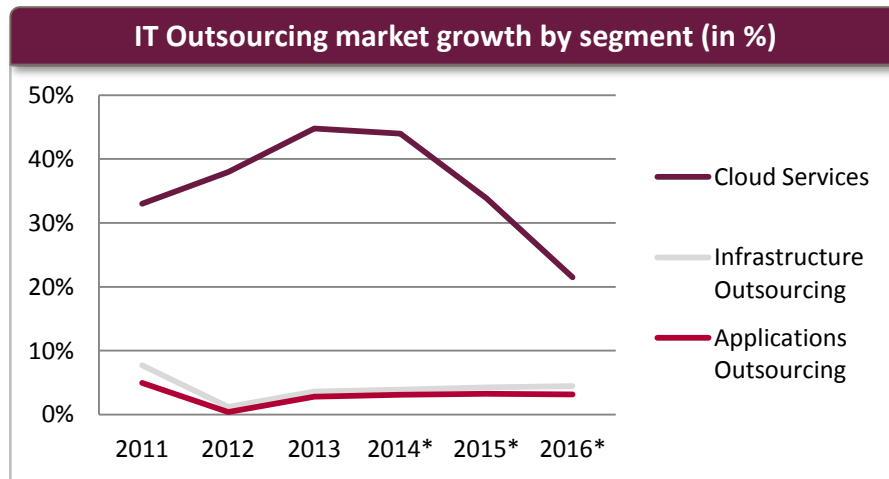
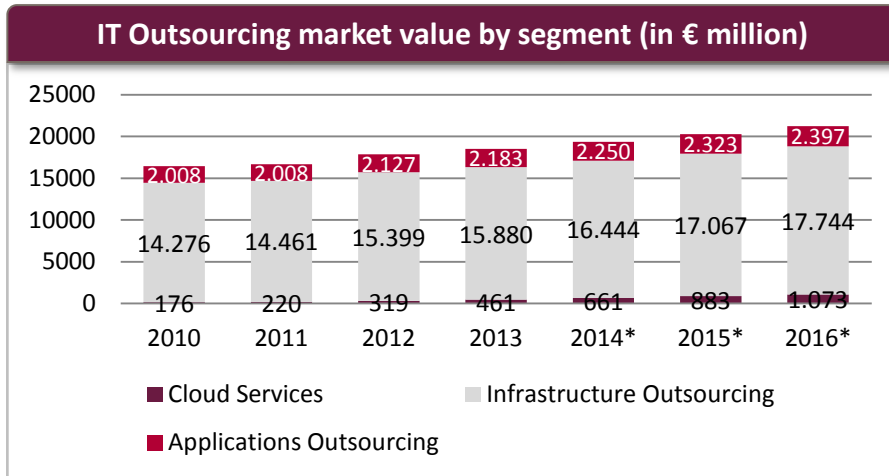
Segments & Sub-segments			2011	2012	2013	2014*	2015*	2016*
Cloud Services	Infrastructure as a Service (IaaS)	Cloud Compute Services	45.7%	46.2%	45.0%	50.5%	37.1%	20.0%
		Cloud Print Services	9.5%	14.3%	14.7%	13.1%	11.0%	10.2%
		Storage as a Service	16.5%	25.6%	45.2%	33.0%	28.0%	24.5%
Total (Cloud Services)			33.0%	37.9%	44.8%	44.0%	33.8%	21.5%
Infrastructure Outsourcing	Data Center Outsourcing	Data Center Outsourcing	3.5%	-0.9%	0.8%	0.7%	0.3%	0.3%
	End User Device Outsourcing	Desktop	1.5%	-1.3%	0.8%	0.0%	-0.3%	-0.7%
		Mobile	100.9%	19.7%	18.8%	16.5%	12.6%	9.8%
	Enterprise Network Outsourcing		4.5%	0.1%	2.7%	2.8%	2.9%	2.9%
	Help Desk Outsourcing		5.5%	-0.1%	2.3%	2.5%	2.7%	2.4%
	Infrastructure Utility Services		36.6%	15.8%	19.4%	20.7%	22.0%	21.0%
Total (Infrastructure Outsourcing)			7.7%	1.2%	3.6%	3.9%	4.2%	4.4%
Applications Outsourcing	Commercial Application Outsourcing		6.5%	0.5%	2.9%	3.1%	3.3%	3.2%
	Custom Application Outsourcing		2.5%	0.3%	2.6%	3.1%	3.2%	3.1%
Total (Applications Outsourcing)			5.0%	0.4%	2.8%	3.1%	3.2%	3.2%
Total (IT Outsourcing)			7.7%	1.8%	4.5%	5.2%	5.4%	5.2%

Source: Gartner 2013

*Estimated values

UK – IT Outsourcing market overview

Cloud Services as fastest growing segment



Overview

- Infrastructure Outsourcing remains the largest segment but with moderate growth outlook; growth outlook is about the same for Applications Outsourcing
- Cloud Services as the fastest growing segment**

Key trends of ICT labor and skills:

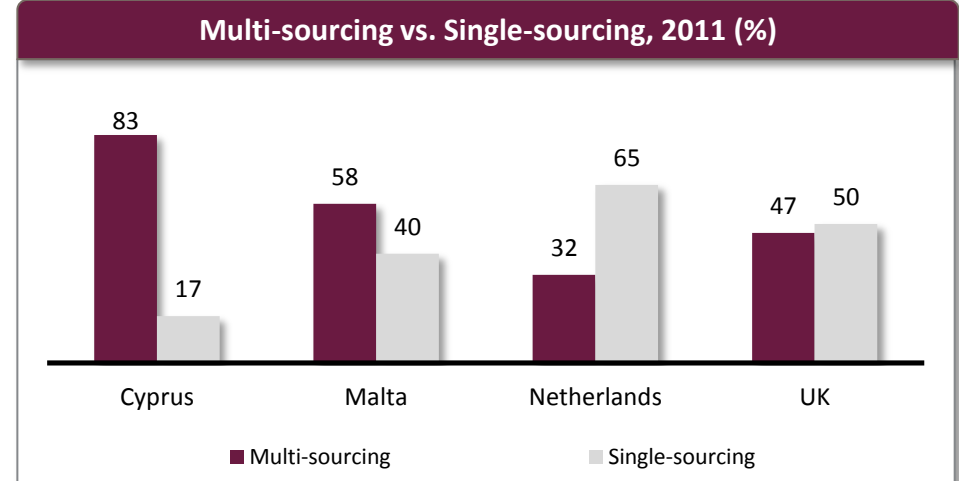
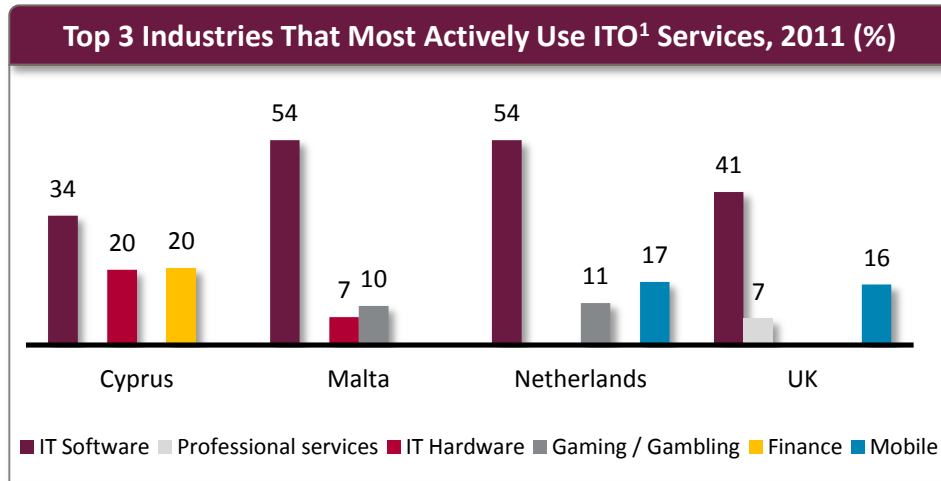
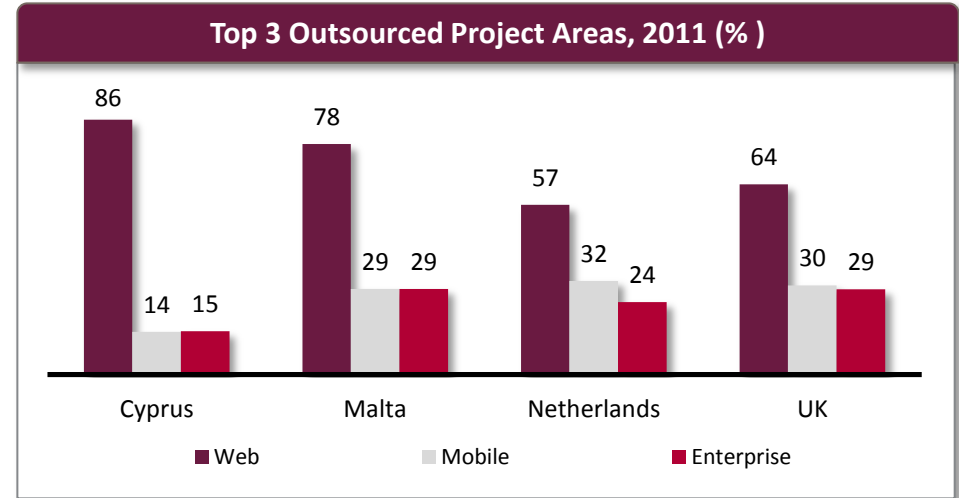
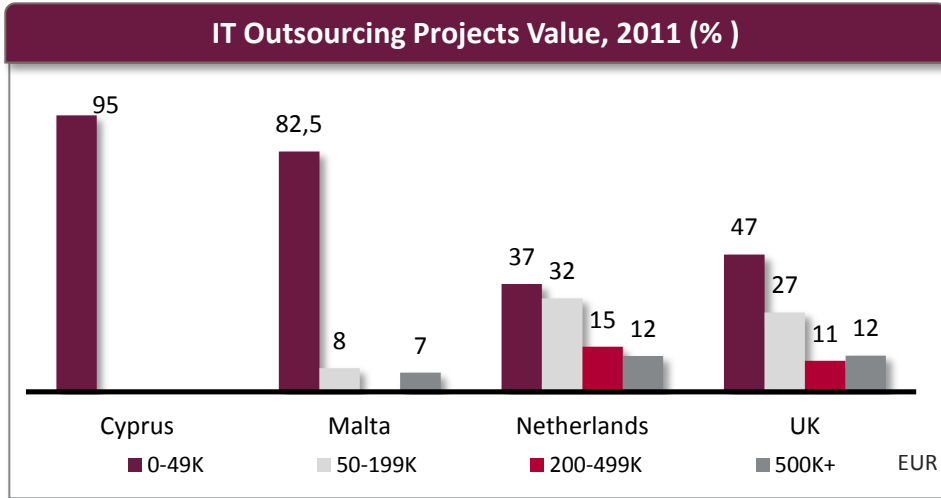
- Around 116,000 ICT vacancies per quarter in 2011**
- 80% of vacancies for ICT professionals in IT Services and Finance; 60% of vacancies in the regions of London and South East England; 25% of vacancies for System Developers (most important areas: development, design, support)**
- Most required skills for all positions: SQL, C, C#, .NET, Java, SQL SVR, ASP, Java Script, Agile and HTML**
- Technical skills which are hardest to fill: .NET/ASP, Dynamics, SharePoint, Visual Basic/Studio, C#, PHP and VMWare**
- Employment by sector: ICT professionals working in financial mediation (3rd biggest sector) grow faster than other sectors (by 4.8%) until 2020; growth in Computer / related activities (largest sector) equals 1.7% in 2020

Source: Gartner 2013

*Estimated values

UK – IT Outsourcing market trends (1/3)

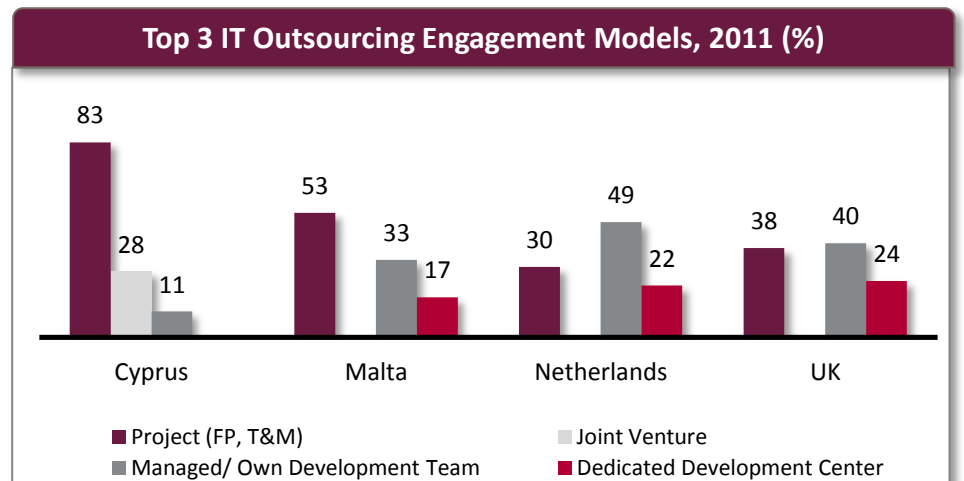
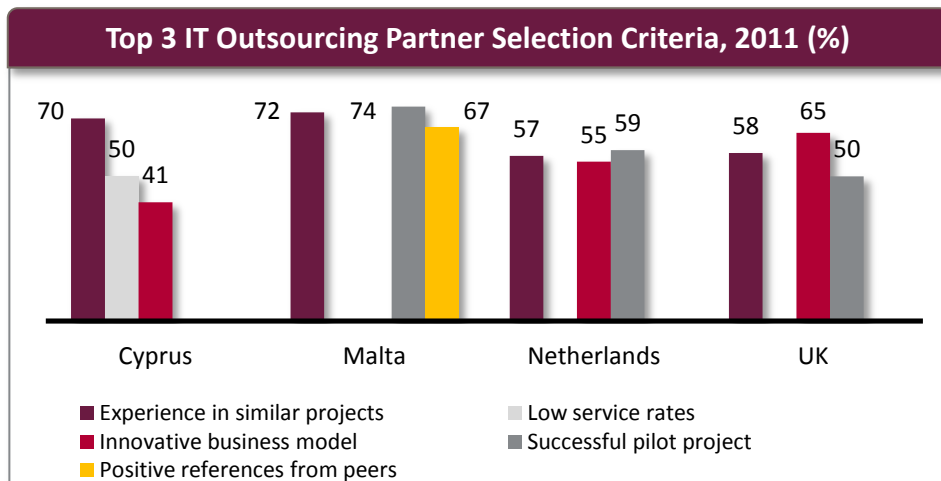
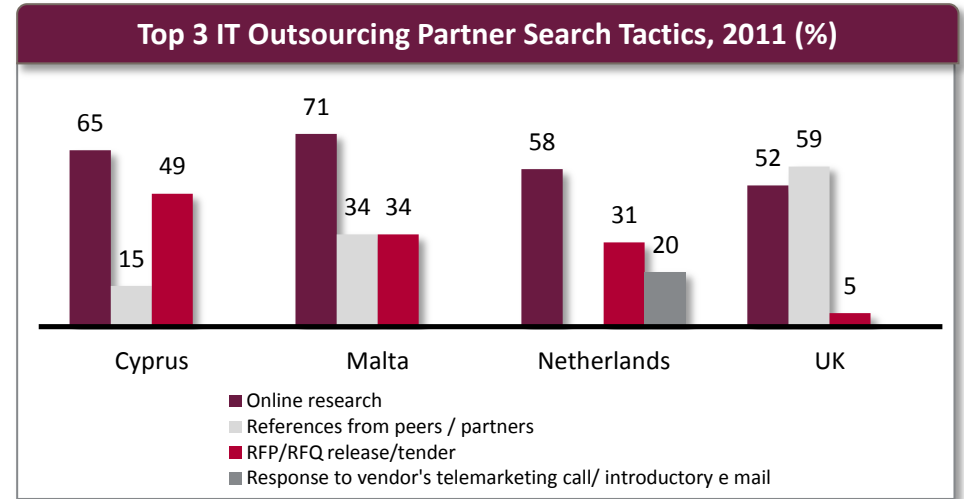
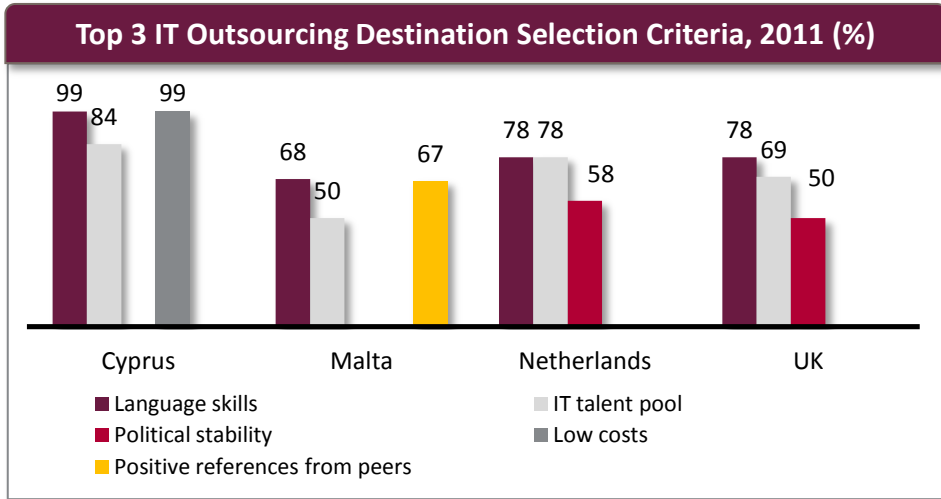
Software and Mobile are the two industries that are most active in outsourcing



1. Information Technology Outsourcing
Source: Pan-European IT Outsourcing Intelligence Report, 2011

UK – IT Outsourcing market trends (2/3)

Language skills and IT talent pool as the most important outsourcing destination selection criteria

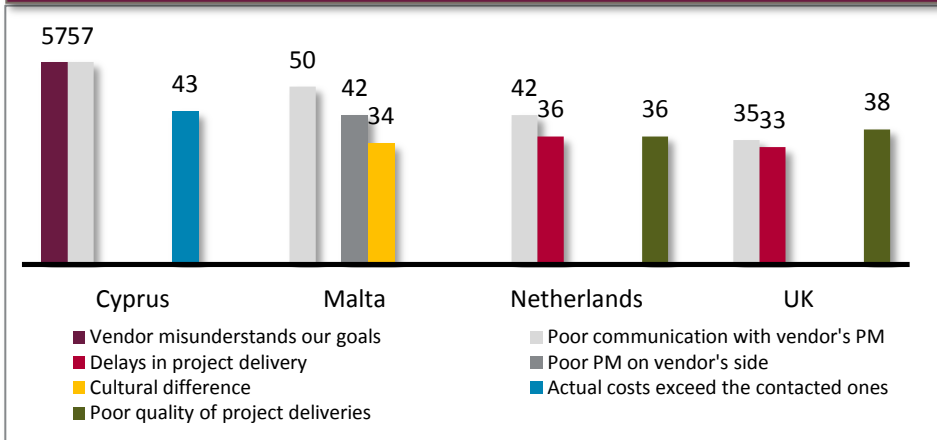


Source: Pan-European IT Outsourcing Intelligence Report, 2011

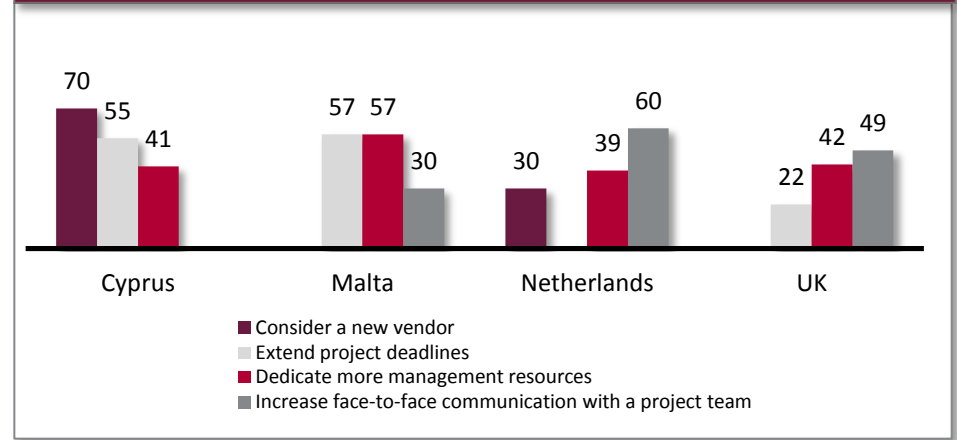
UK – IT Outsourcing market trends (3/3)

Lack of domestic resources and slow time-to-market as outsourcing key drivers

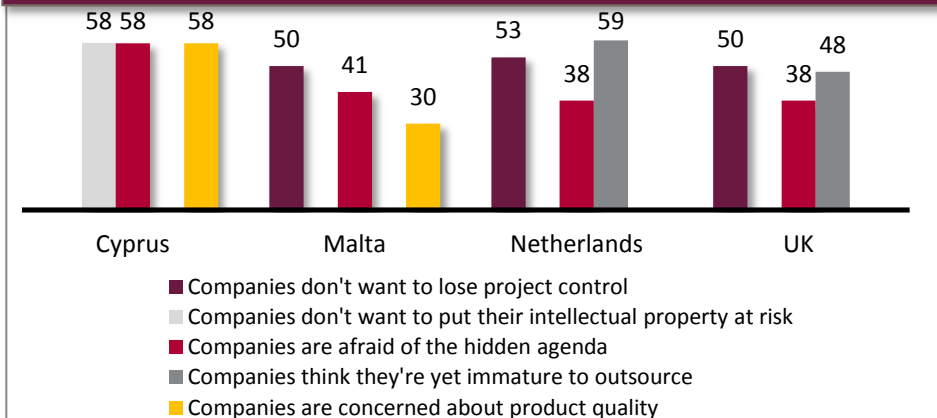
Top 3 IT Outsourcing Challenges, 2011 (%)



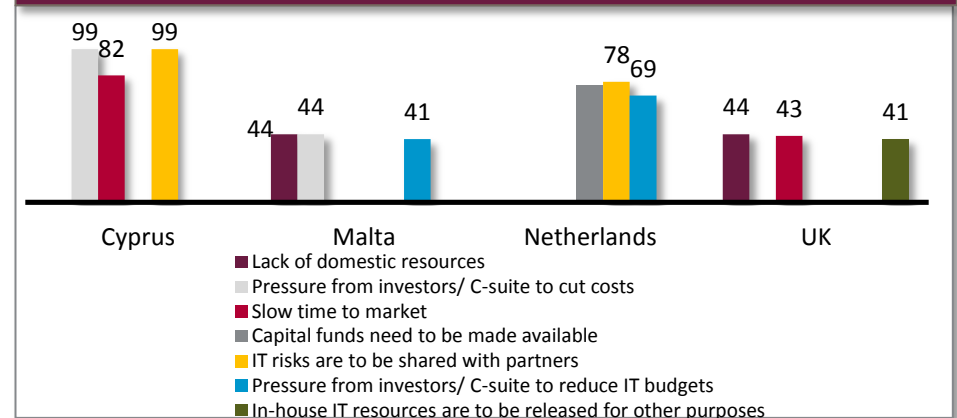
Top 3 Responses to Challenges, 2011 (%)



Top 3 Factors Preventing Companies from IT Outsourcing, 2011 (%)



Factors Likely To Influence Companies' IT Outsourcing, 2011 (%)



Source: Pan-European IT Outsourcing Intelligence Report, 2011

UK – Offshoring

Salaries per skill in the UK 2012 (1) – Developer (annual salary in €)

Programming Language	Junior Developer	Developer	Senior Analyst/Developer	Technical Lead	Software Architect
C#/ASP.net	32,844	46,920	58,650	64,515	82,110
Java	37,536	52,785	70,380	64,515	87,975
VB.net	31,671	46,920	70,380	64,515	76,245

Professional	Programming Language	Annual Salary (in €)
Database Developer	MSSQL/PL/SQL	52,785
Front End Developer	HTML/CSS/XML/etc.	46,920
Web Developer	PHP/Ruby/Perl/etc.	46,920
Analyst Programmer	C/C++	58,650

Source: Hays

UK – Offshoring

Salaries per skill in the UK 2012 (2)

Testing		
Professional	Functional Testing - Salary (annual in €)	Non-Functional Testing - Salary (annual in €)
Test Analyst	46,920	49,853
Senior Test Analyst	55,718	58,650
Test Lead	64,515	66,861
Technical Lead	70,380	72,726
Test Manager	76,245	85,043
QA Analyst	51,026	53,372

Oracle	
Professional	Annual Salary (in €)
Financials Consultant	70,380
Procurement Consultant	70,380
HR Consultant	70,380
OBIEE Developer	76,245
ODI Developer	76,245
UCM Developer	76,245

Source: Hays

UK – Offshoring

Salaries per skill in the UK 2012 (3) – SAP

Professional	Annual Salary (in €)	Professional	Annual Salary (in €)
ABAP Developer	58,650	IS-Oil Consultant	93,840
BASIS Consultant	64,515	AFS Consultant	76,245
FI/CO Consultant	76,245	IS-Public Services Consultant	76,245
HCM Consultant	76,245	IS-Retail	76,245
SD/MM Consultant	76,245	BI Consultant	76,245
PP/PI Consultant	76,245	BI-BO Consultant	76,245
CS Consultant	76,245	CRM Consultant	82,110
WM/QM/PP Consultant	76,245	Solution Architect	91,494
SRM Consultant	76,245	Technical Architect	91,494
APO Consultant	76,245	Project Manager	76,245
IS-Automotive Consultant	76,245	Programme Manager	99,705
IS-Utilities Consultant	76,245	Netweaver Consultant	76,245

Source: Hays

UK – Offshoring

Top five job specific skills cited within adverts for ICT staff

Systems Developers	Senior Systems Developers	Project Managers	Systems Administrators	Business Analysts
SQL	C	PRINCE	Linux	Agile
C	C#	Agile	SQL	SQL
C#	SQL	SAP	Unix	UML
.NET	Java	Scrum	MS Exchange	SAP
Java	.NET	C	VMWare	SQL Server
Systems Architects/Planners	Test Analytics	Technical Pre/Post Sales Support Staff	Software Engineers	Database Administrators/Analysts
Java	SQL	Oracle	C	SQL
.NET	Agile	SQL	C++	SQL Server
SQL	MS Office	SAP	Java	Oracle
Oracle	Java	SQL Server	C#	Access
C	SQL Server	C	Linux	SAS

Source: Technology Insights 2012

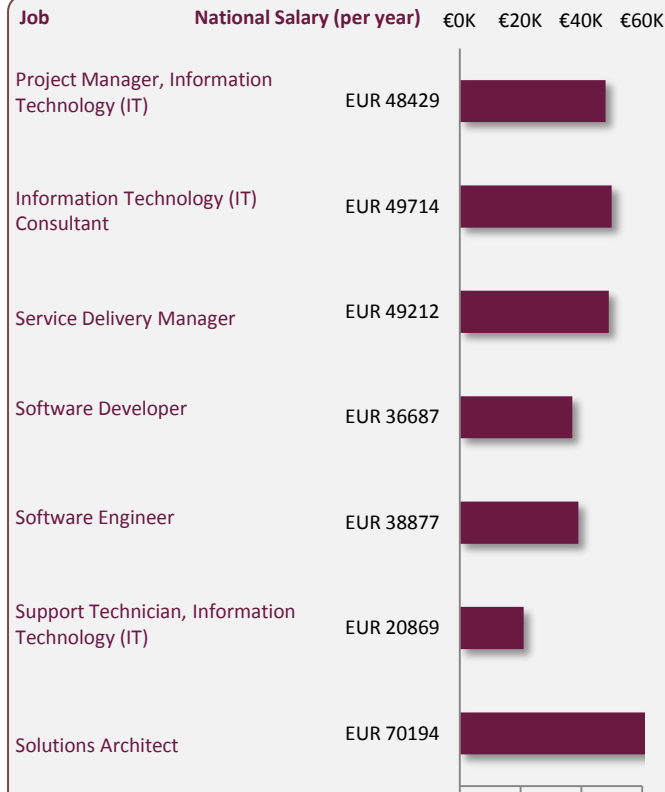
UK – IT Outsourcing market salary structure

SQL, C++ and Java are the most sought-after skills in the Software Development market

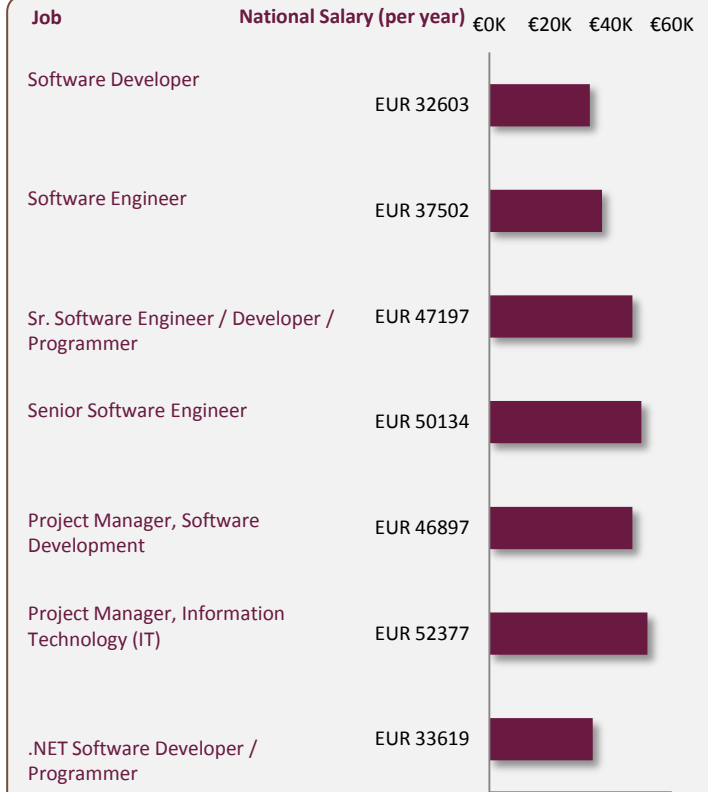
Industry: Software Development
Most Popular Skills

- 1 SQL
- 2 C#
- 3 Java
- 4 .NET
- 5 C++
- 6 HTML
- 7 Project Management

Industry: Information Technology (IT) Services
Median Salary by Job



Industry: Software Development
Median Salary by Job



Source: Payscale Website,UK

UK – IT Outsourcing key market trends

Long term IT partnerships and innovative business models as corner stones for success

Multi-Supplier contracts

- There is a general move away from clients outsourcing large swathes of IT to a single supplier, towards **multi-sourcing models** where they engage with multiple best-of-breed suppliers to support different service ‘towers’
- This is evident in major recent multi-sourcing programs

Risk-Reward Model

- From ITO buyers’ reluctance to the willingness to change their service providers who fail to meet their business goals and project milestones
- The economic slowdown has encouraged clients to move for ‘value-based’ or ‘risk-reward’ commercial models with potential suppliers

Innovative business engagement

- From dedicated development center and project-based models to more innovative business / engagement models, which are able to provide the maximum managerial control of the outsourced projects and transparent pricing

Long Term IT Partnerships

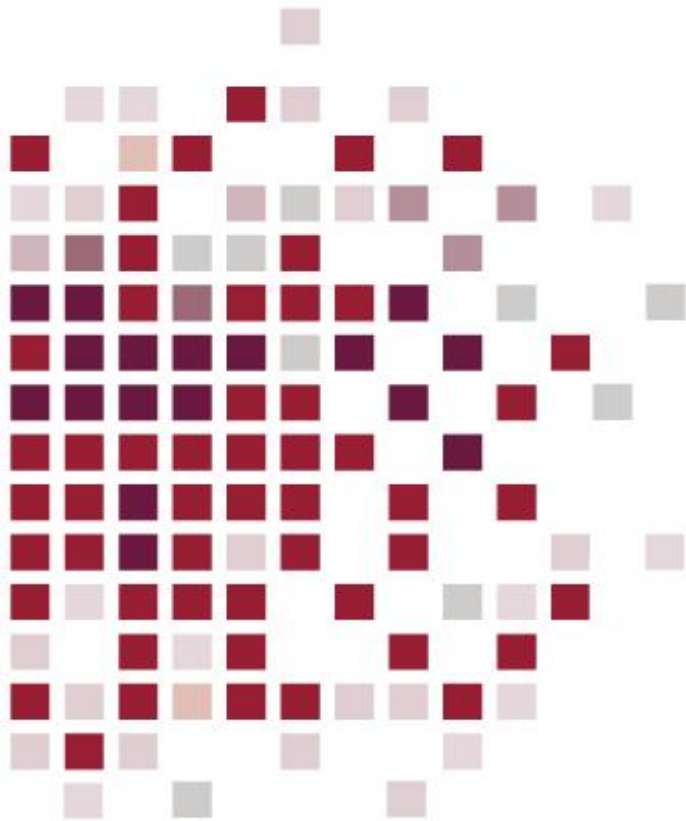
- **One of the key drivers behind the growth in outsourcing in the UK is the country’s flexible labor laws, with the long-established Transfer of Undertakings (Protection of Employment, TUPE) regulation**
- Customers are moving from short-term cost saving goals to **longer-term IT management strategic partnerships** and cross-border knowledge exchange

Offshoring and Nearshoring

- **The UK has also led Western Europe in terms of the use of global sourcing models**
- **It has become “table stakes” for suppliers on commercial sector AM and BPO contract bids to incorporate an element of offshore delivery in order to leverage the cost advantage of labor arbitrage**

Source: Capgemini Consulting Analysis

Agenda



1. ICT Market
2. Software Market
3. IT Services Market
4. IT Outsourcing
5. **Key Success Factors for Exporting**

UK – Key Success Factors for Exporting

Marketing & Positioning

- Creating a “national brand” (cluster of excellence) → trust
- Ability to communicate customer value and ROI
- Forming **strategic alliances** with business partners in the UK (e.g. IT consultants)
- Establishing **long-term IT partnerships**
- **References** (UK companies demand for references from peers)
- Online research requires a **highly visible & professional** website
- Innovative service portfolio and delivery models
- Competitive and transparent pricing: bid for small projects (<200,000€)
 - **Successful “project pilot” as a door-opener**
 - **Charge low prices and low service rates** (highly competitive market)

Quality & Processes

- Knowledge of evaluation, selection and purchasing procedures
- Compliance with quality, deadlines and budget requirements
- Methodologies and certifications: Agile methods (Scrum), PRINCE2
- Compliance with international IT security management systems and standards (e.g. ISO/IEC 27001, ISO/IEC 15408)
- **Professional HR management** (motivation, skills management) → minimizing fluctuation
- **Project management skills**: continuous work tracking and reporting
- Customer education (SMEs): how to use offshoring effectively by applying suitable models and processes

Technology & Capabilities

- **Most sought-after skills:**
 - SQL, C, C#, .NET, Java, SQL SVR, ASP, Java Script, PHP, HTML
 - NET/ASP, Dynamics, SharePoint, Visual Basic / Studio, VMWare
 - Agile methods
- Ability to support client with evaluation, project preparation and requirement specification; technical documentation
- Measures to ensure security and data protection
- **Target industries:** financial services, public sector, wholesale / retail, utilities & telecommunication



Thank you!!

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