

2017

Q1 Revenues

Paris • April 26th, 2017

Disclaimer

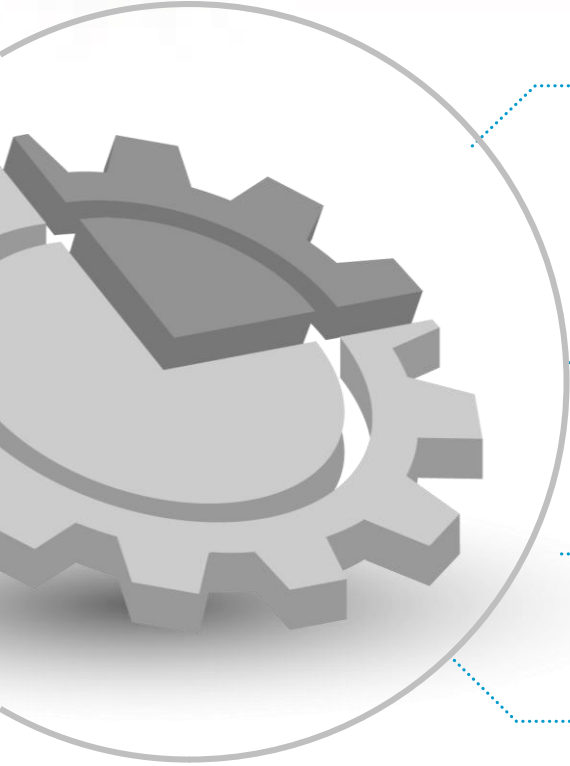
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Paul **HERMELIN**

Starting 2017 on a solid footing



- **€3,171m** revenues
- **+2.8%** dynamic constant currency growth
- Strong performance in FS and Manufacturing
- All geographies in line or above expectations



- Digital & Cloud growing steadily at **+24%** YoY
- Reaching **32%** of our revenues
- Consulting services growing double digit



- **€3,001m** bookings
- Good momentum, positive market dynamic



- **+12%** YoY workforce in global production centers
- **57%** of our total headcount

**We confirm
our outlook
for 2017**

Digital and Cloud assets driving our performance in priority sectors



A strong value proposition

- Worldwide network of now 10 **Applied Innovation Exchanges**
- **End-to-end service portfolio**, reinforced through acquisitions
- **Management Consulting capabilities** to foster business with CXOs
- **Sectorial expertise** with prominent leadership in FS, Manuf and CPRD
- Extensive and intimate **network of alliances** constantly renewed with innovative emerging partners
- Long-lasting recognition in **best-in-class technology skills**

Q1
wins

Digital user experience

Helping a **cruise line company in the US** disrupt its business with a differentiated customer experience, building a data lake and deploying a CRM in a greenfield implementation

TME

Big salesforce implementation for a **large energy company in Europe**

EUC

Big data & analytics

Agile BI and DevOps with SAP HANA, for a **major global oil&gas company**

EUC

Transforming the digital service delivery for a **large life insurer** using DevOps and leveraging our AIE network and Fintech ecosystem

FS

Digital manufacturing

Digital factory and PLM for the digital transformation of a **global electronics company**

Manuf

Deploying a new PLM for a **leading aircraft manufacturer**

Manuf

PLM deal based on PTC for a **German automotive supplier**

Manuf

Cloud / Cybersecurity

Azure cloud native apps development for an **insurance products company in NA**

FS

Massive migration to AWS public cloud for a **global leader in the beverage industry**

CPRD

Five-year private cloud deal with a **big healthcare insurance organization**

FS

Cloud native apps development for a **car rental company in UK**

CPRD

For a **large bank in the US**, massive migration of 600+ applications to private cloud

FS

External API development and run for a **large US Bank**

FS

Buoyant Continental Europe, improving trends in North America

North America -0.2%

- EUC sequentially stable as planned
- Other sectors improving overall
- Implementing our action plan for growth

APAC & LatAm +13.6%

- Gaining market share in a dynamic APAC region
- Latin America in line with Q4

Continental Europe +6.7%

- Excellent momentum
- France : 5.2%
- Rest of Europe : +7.8%
- Solid broad-based traction, with buoyant demand for Digital

UK & Ireland -7.6%

- HMRC re-insourcing weighing as planned
- Healthy private sector at mid-single digit

Note: All growth rates are year-on-year constant currencies growth rates unless otherwise stated

An active acquisition agenda, fueling our momentum

Strengthening our innovation and portfolio capabilities



- ◆ Top notch digital strategy and experience design consultancy firm – 150 employees, US based, 7 studios worldwide
- ◆ Strategic global development plan in place
- ◆ Already reinforcing Consulting in key pursuits in the FS sector



- ◆ Expert in omnichannel ecommerce – 175 employees
- ◆ Leading player in Demandware (#1 in France), reinforcing our position on Salesforce

... and reinforcing our footprint in North America



- ◆ The largest independent service provider specialized on Duck Creek Insurance software, 300 employees
- ◆ Immediate commercial momentum, cross-selling opportunities



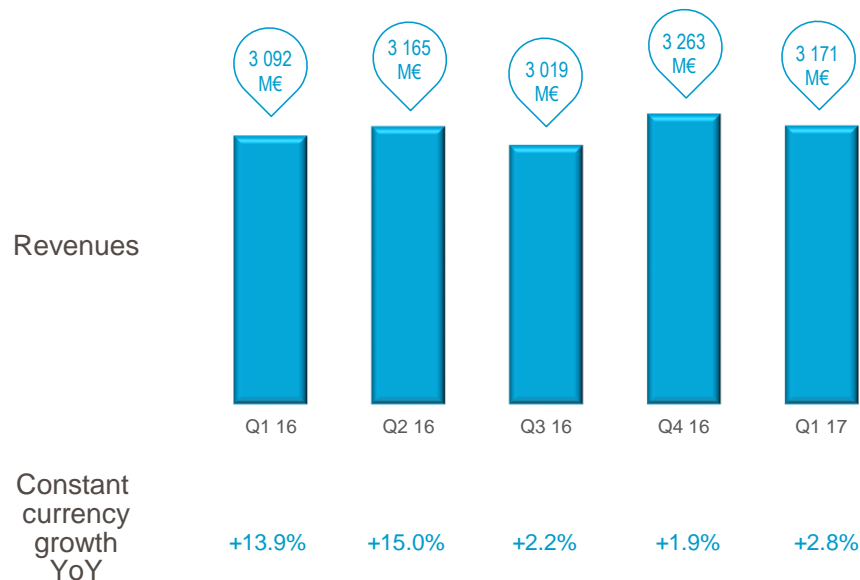
- ◆ Offer to buy Ciber's Inc. NA business, under chapter 11, for \$50m. Revenues under consideration \$275m - 3,000 staff
- ◆ Solid client references in Automotive, Telecom and Media
- ◆ Accretion to Group EPS as of H1 2018

➤ Actively scanning the market for more opportunities in Digital and Cloud, notably in North America



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Revenues Quarterly Evolution

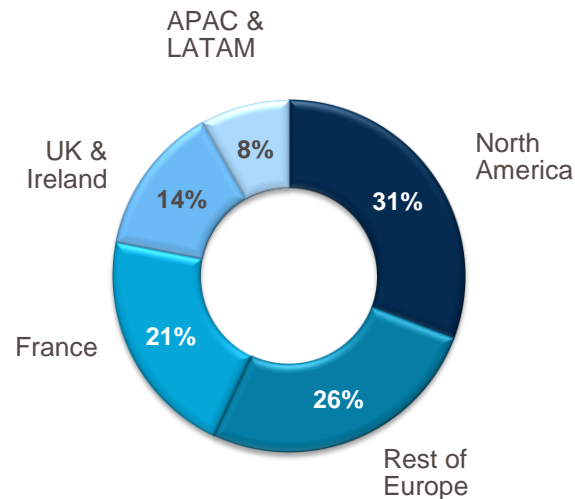


Constant currency growth
+2.8% YoY

	Q1 YoY growth
Organic	+ 2.6%
Group scope	+0.2pt
Constant currency	+ 2.8%
currencies	+0.2pt
Current	+ 3.0%
activities being discontinued	-0.4pt
Reported	+ 2.6%

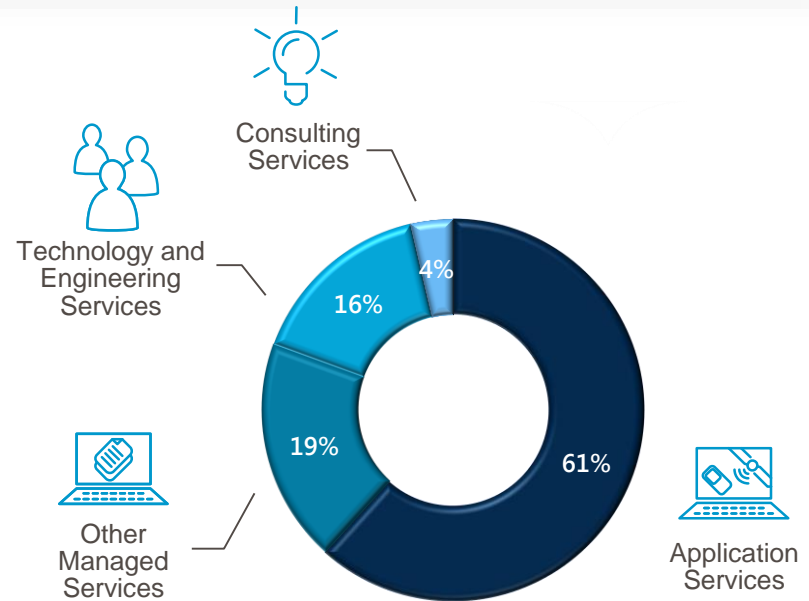
Q1 2017 Revenues by Main Geography

	in €m		Year-on-Year	
	Q1 2016	Q1 2017	Reported	Constant Currency
			Q1 2017 / Q1 2016	Q1 2017 / Q1 2016
North America	938	972	+3.6%	-0.2%
UK & Ireland	525	435	-17.1%	-7.6%
France	633	666	+5.2%	+5.2%
Rest of Europe	780	841	+7.9%	+7.8%
APAC & LATAM	216	257	+18.9%	+13.6%
TOTAL	3,092	3,171	+2.6%	+2.8%



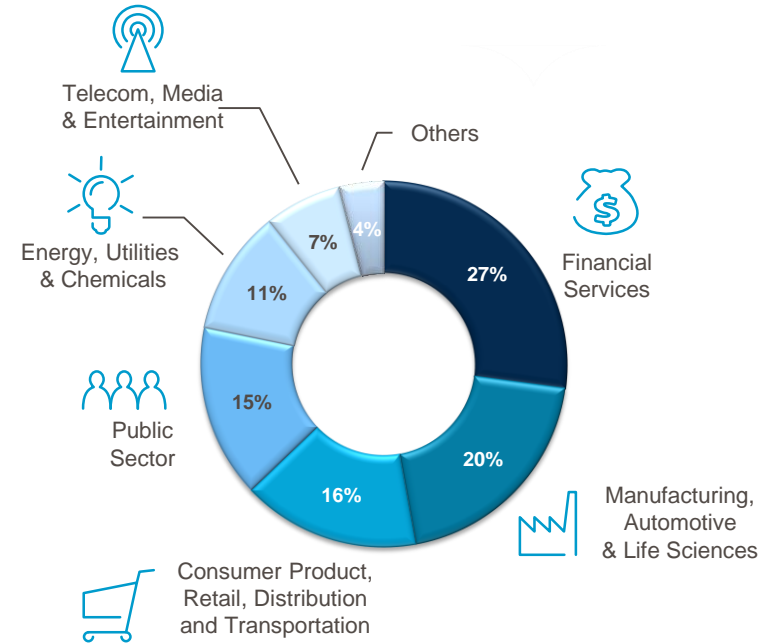
Q1 2017 Revenues by Business

	Year-on-Year Constant Currency Q1 2017 / Q1 2016
Consulting Services	+10.6%
Technology and Engineering Services	+5.0%
Application Services	+5.3%
Other Managed Services	-7.6%
TOTAL	+2.8%

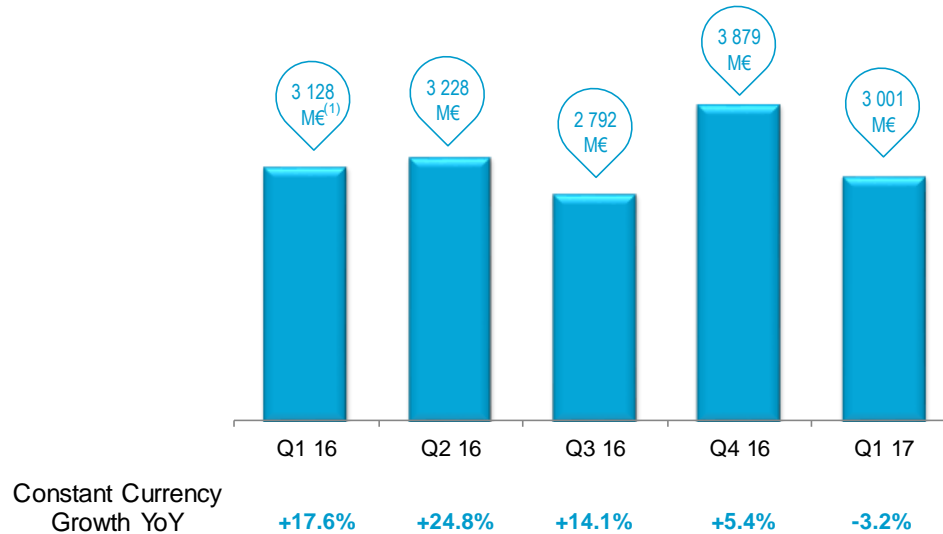


Q1 2017 Revenues by Sector

	Year-on-Year Constant Currency Q1 2017 / Q1 2016
Financial Services	+8.1%
Energy, Utilities & Chemicals	-0.5%
Manufacturing	+9.1%
Consumer Product, Retail, Dist. & Transportation	+3.6%
Public Sector	-5.7%
Telecom, Media & Entertainment	-1.3%
TOTAL	+2.8%

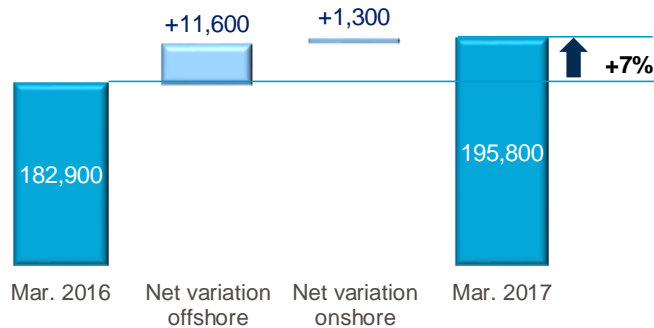


Bookings Evolution

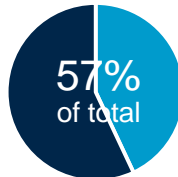


⁽¹⁾ Includes the renewal of a large multi-year UK public sector contract

Headcount Evolution



Attrition	Mar. 16	Mar. 17	Year-on-Year variation
Consulting Services	16.5%	18.0%	+1.5pt
Technology and Engineering Services	16.5%	17.6%	+1.1pt
Application Services	16.0%	14.3%	-1.7pt
Other Managed Services	19.4%	16.5%	-2.9pt
TOTAL	16.7%	15.3%	-1.4pt



Workforce in global production centers:





Capgemini

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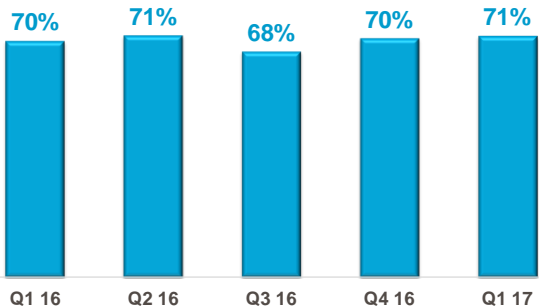
A close-up photograph of a hand holding a black pen, poised to write on a document. The document features a table with multiple columns of numbers. In the background, another hand is visible, typing on a keyboard. The image is partially obscured by a blue overlay on the right side.

Appendix

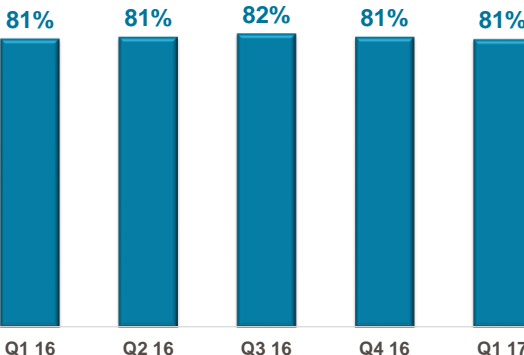
Utilization Rates



Consulting Services



Application Services



Technology and Engineering Services

