



NTT DATA's Global Business

September 22nd, 2021
NTT DATA Corporation
Kaz Nishihata

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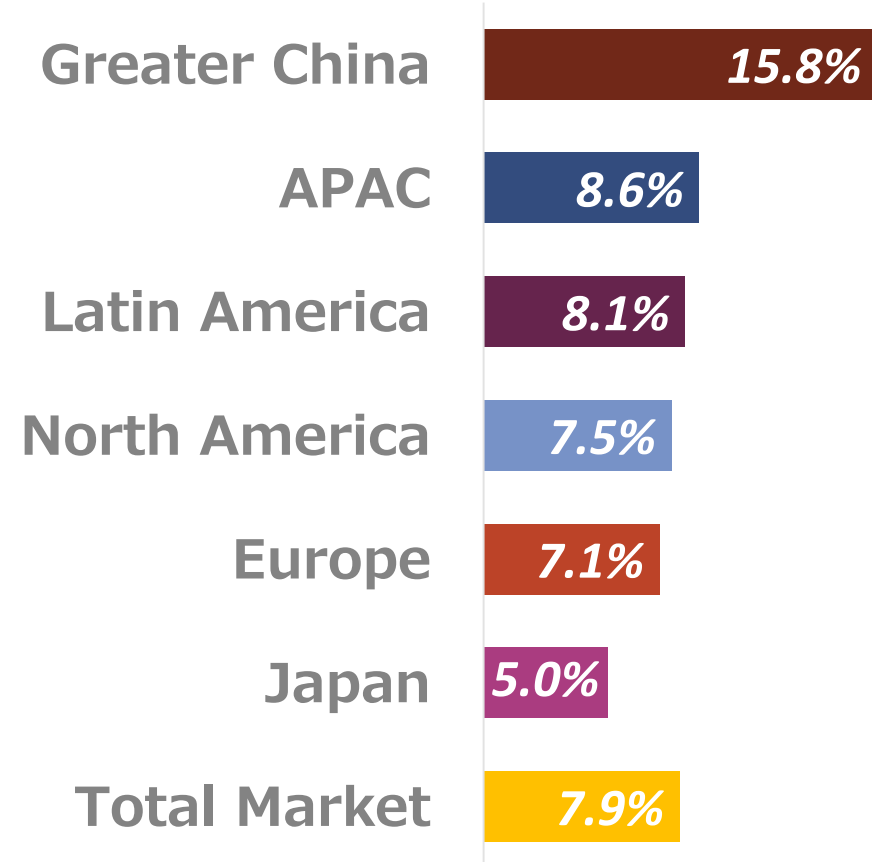
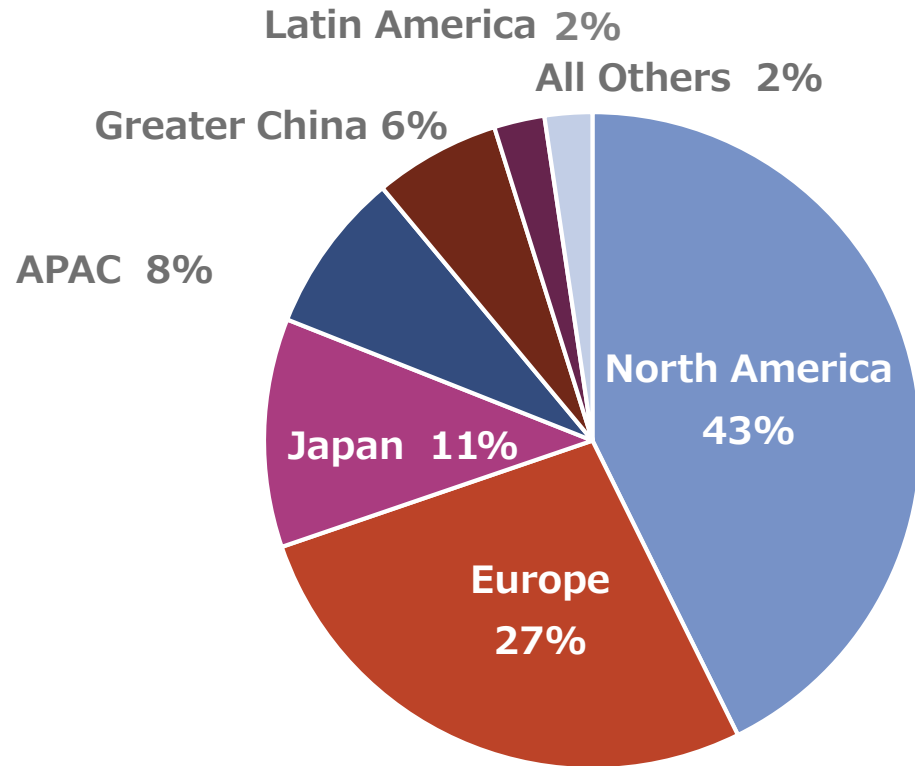
Status of Global Business

Status of Global Business

IT Market Size and Growth

IT Service Market in 2020YR: 1,071BUSD

IT Services Growth(2020-2025)CAGR

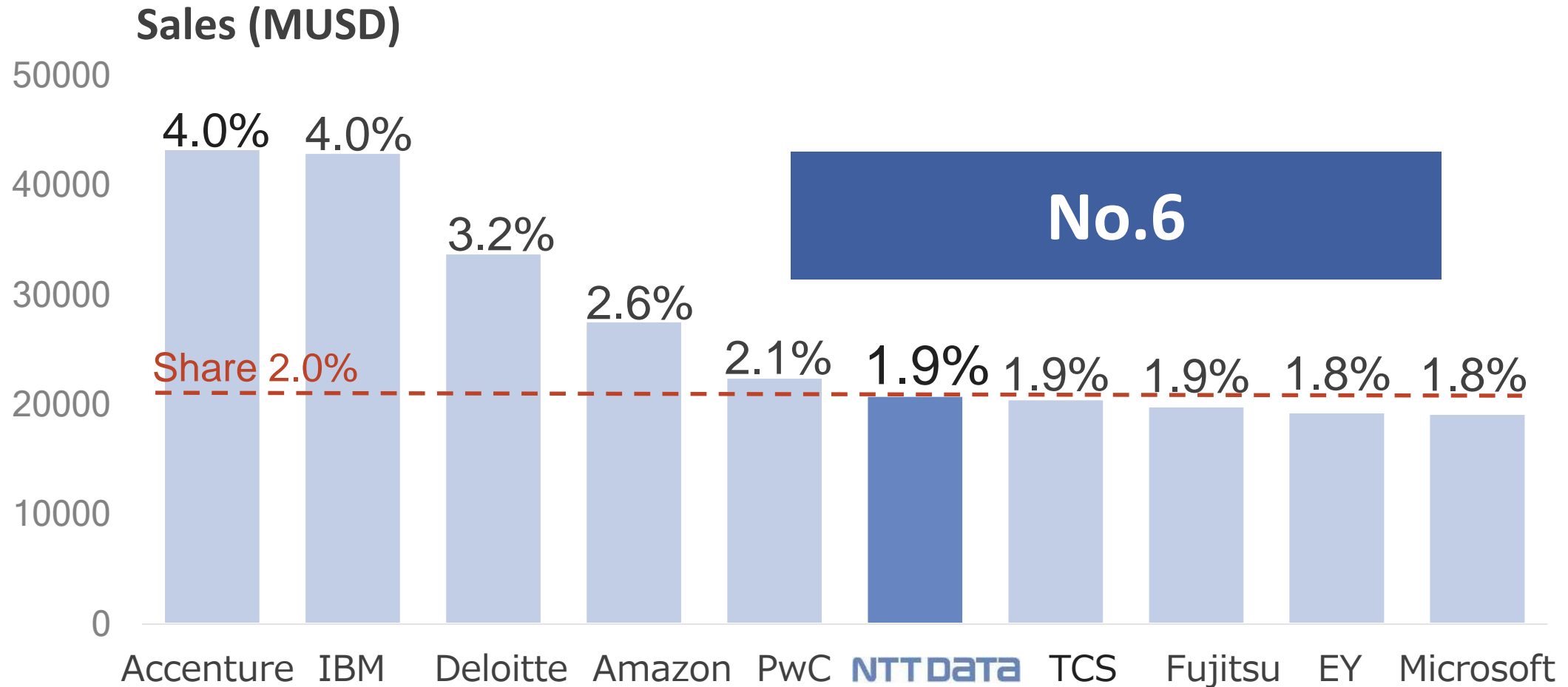


Graph created by NTT DATA based on Gartner Research, Gartner, Forecast : IT Services, Worldwide, 2019-2025, 2Q21 Update, Dean Blackmore, et al., 23 June 2021, .North America stands for North America region, Europe stands for Western Europe and Eastern Europe regions, Japan stands for Japan region, "APAC" stands for Mature Asia/Pacific and Emerging Asia/Pacific regions and "Greater China" stands for Greater China region, "Latin America" stands for Latin America region, "All Others" stands for Sub-Saharan Africa and Middle East and North Africa and Eurasia regions in Gartner's definition Calculations performed by NTTData, End User Spending in Constant Currency basis.

All statements in this report have been reviewed by Gartner. Each Gartner publication speaks as of its original publication date (and not as of the date of this presentation). The opinions expressed in Gartner publications are not representations of fact, and are subject to change without notice.

Status of Global Business

IT Services Market Share Ranking in the Global Market 2020

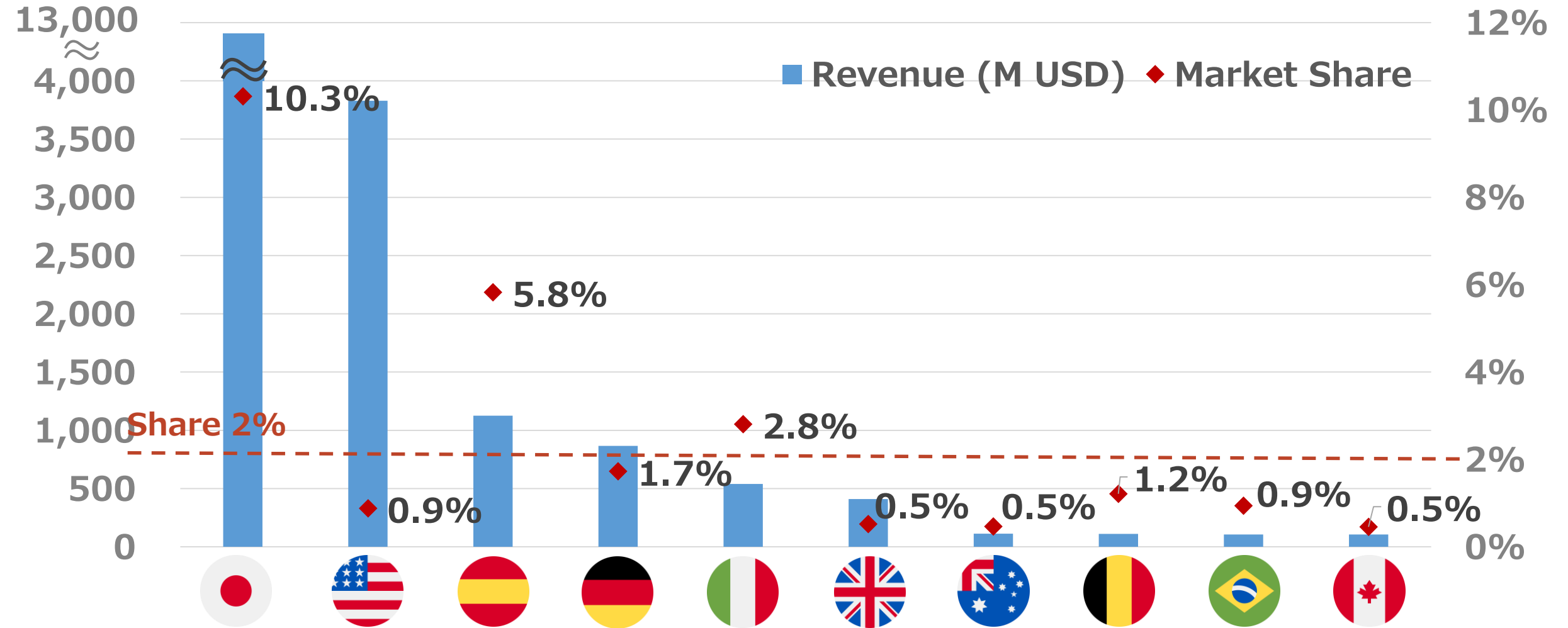


The graph shows 2020 IT Services Market Share Vendor Market Share ranking created by NTT DATA based on Gartner Research, Gartner, Market Share: IT Services, Worldwide 2020, Dean Blackmore et al., 8 April 2021, Calculated by Vendor Revenue in Constant Currency.

TCS = Tata Consultancy Services, All statements in this report have been reviewed by Gartner. Each Gartner publication speaks as of its original publication date (and not as of the date of this presentation). The opinions expressed in Gartner publications are not representations of fact, and are subject to change without notice.

Status of Global Business

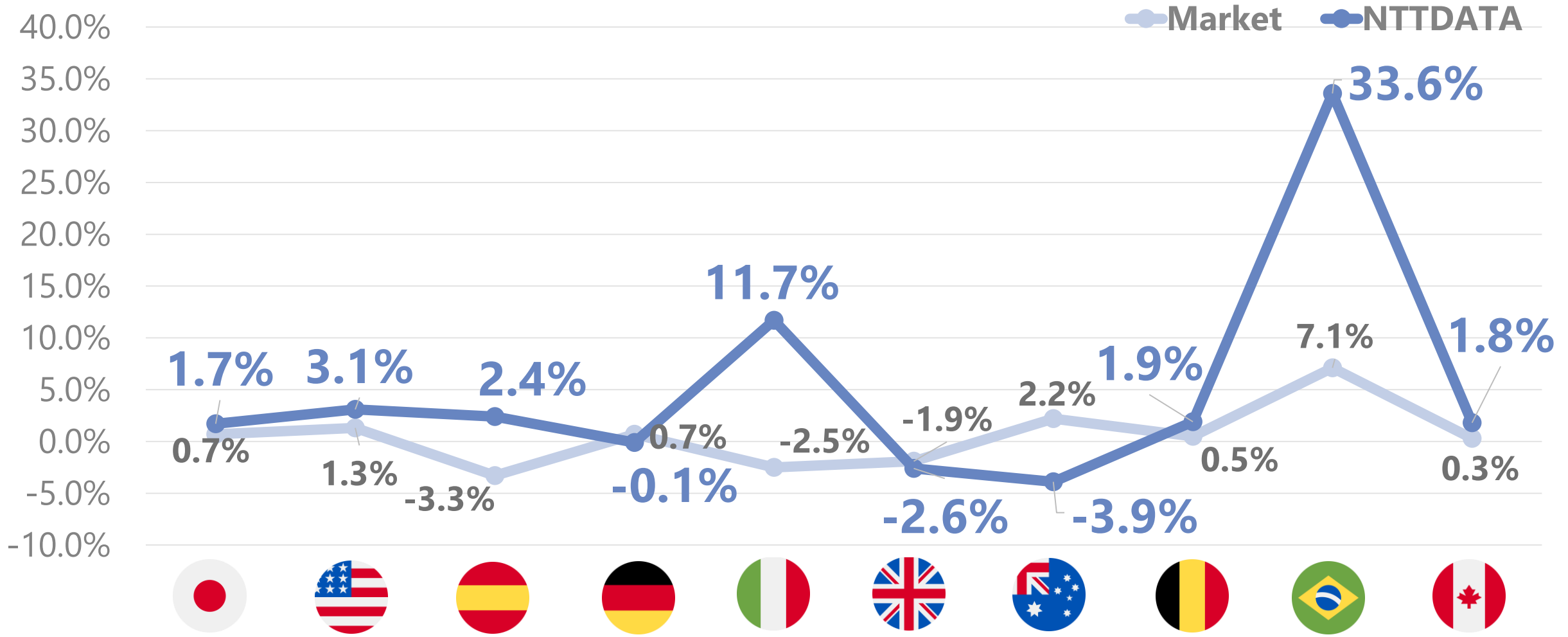
Top 10 countries in NTTDATA's Revenue and Market share 2020



The graph shows 2020 IT Services Revenue & Market Share by countries created by NTT DATA based on Gartner Research, Gartner, IT Services Market Share, 2020, Dean Blackmore et al., 8 April 2021, Vendor Revenue & share in Constant Currency, Calculations performed by NTTData. All statements in this report have been reviewed by Gartner. Each Gartner publication speaks as of its original publication date (and not as of the date of this presentation). The opinions expressed in Gartner publications are not representations of fact, and are subject to change without notice.

Status of Global Business

IT Market Growth and NTTDATA's Revenue Growth (2019-2020)

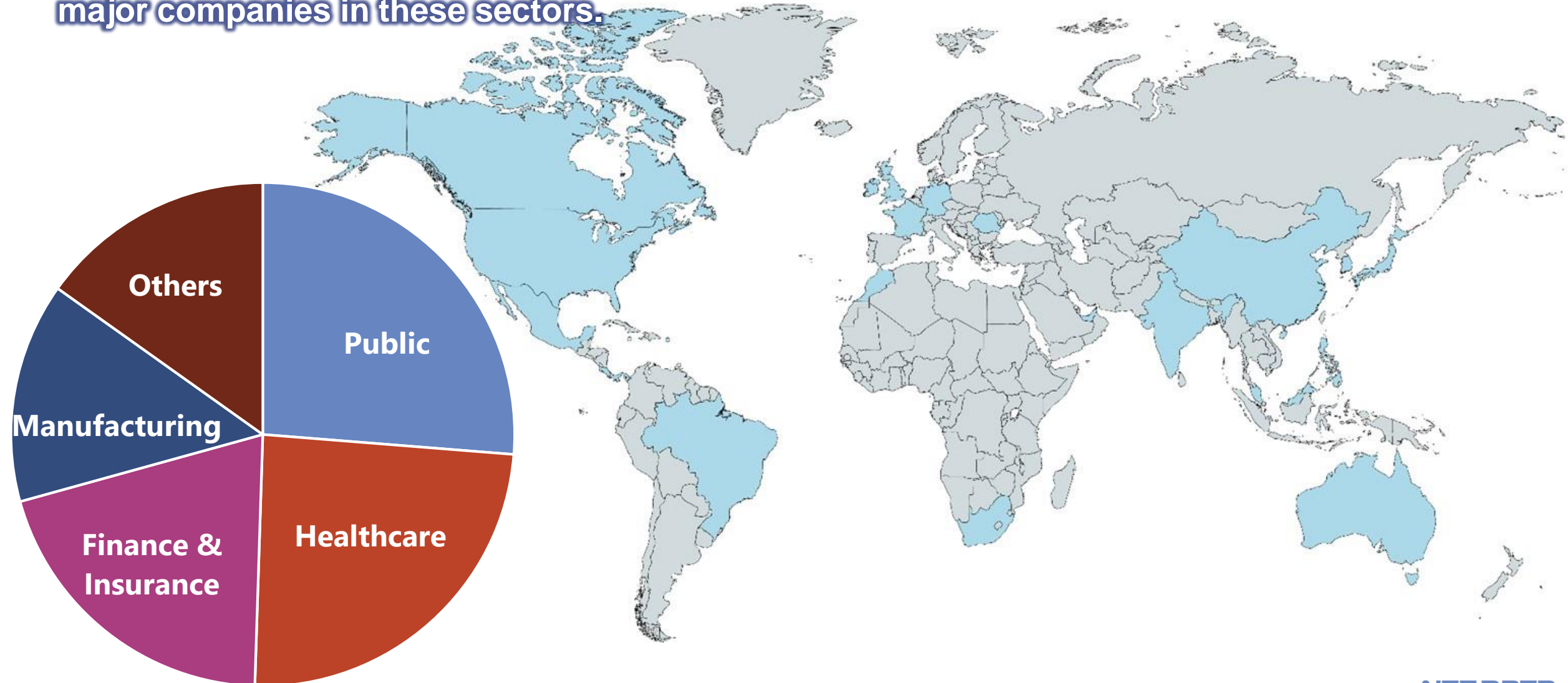


The graph shows 2020 IT Market Growth and NTTDATA's Revenue Growth by countries created by NTT DATA based on Gartner Research, Gartner, IT Services Market Share, 2020, Dean Blackmore et al., 8 April 2021, made by Growth in Constant Currency. All statements in this report have been reviewed by Gartner. Each Gartner publication speaks as of its original publication date (and not as of the date of this presentation). The opinions expressed in Gartner publications are not representations of fact, and are subject to change without notice.

Status of North America Business

Status of North America Business/Key Business Contents

NTT DATA maintains a balanced portfolio in public, healthcare, finance & insurance, and manufacturing sectors and offers services such as consulting and digital transformation to major companies in these sectors.



Status of North America Business/Structural Transformation Initiatives and Outcomes

FY2020: For transitioning to business domains centering on the digital field, NTT DATA completed the structural transformation ahead of schedule.

FY2021: Aiming to achieve an EBITA margin of 7%, NTT DATA will steadily promote measures to improve profitability.

FY2020 Outcomes

FY2021 Issues and Status of Progress

Completed

Enhancing and reskilling digital talent



**Grow digital and consulting
Improving profitability in traditional areas**

- **Being implemented as planned**
NTT DATA has won multiple projects, including a digitalization project in a traditional areas.

Completed

Optimizing resources



Strengthen digital capabilities by enhanced digital talent management

- **Strengthening digital capabilities through M&A**
NTT DATA strengthened key areas in the digital business by acquiring Nexient

Completed

Consolidating offices and data centers



Accelerate portfolio reshaping for continuous business domain transformation

- **Transitioning to business domains centering on the digital field**
Accelerating withdrawal from non-core, non-digital businesses

Status of North America Business/Measures for Digital Business (Digital Strategy)

NTT DATA will focus on areas where markets are growing significantly and where there are high demands from existing clients. Taking measures to strengthen such areas, we will expand our market share in digital-related projects.

Hyper focus for Growth

- Cloud Transformation
- App Modernization
- Cloud Enterprise Apps
- Data as an Asset
- Consulting



Securing digital talents

- Acquiring digital resources + Reskilling



Consulting



Digital



Core Digital Services

Status of North America Business/Measures for Digital Business (M&A)

NTT DATA won multiple new digital transformation projects by enhancing its digital talent through M&A and by other means. NTT DATA will continue to accelerate transformation towards digital-centered businesses.

2019.12

2020.10

2020.12

2021.6



AWS
consulting services



Snowflake
Data Analytics Services



Service Now specialized
Consulting services



Cloud app
development

Status of North America Business/Measures for Digital Business (Digital Talent)

NTT DATA is enhancing digital IT resources through strategic initiatives such as campus hiring, M&A, and the opening of Innovation & Delivery Center.

Emerging Talent Program

Methodical approach from identification to deployment

Campus hires | Early career (1-3 years)

Significant increase across geographies

4x in US over 2 years | 3x in India over 2 years

Strategic Digital Acquisitions

acoriu

HASHMAP
an NTT DATA Company

Nexient
an NTT DATA Company

Employees
at time of purchase
~1,000



Nashville Innovation & Delivery Center

FY'21: 75 digital/consulting specialists

FY'22: 200 digital/consulting specialists

Facility Capabilities

- Collaborative work pods
- Design thinking & workshop-oriented spaces
- Training zones



Attract and develop **high-demand skillsets**
in Consulting and Digital Technologies
at a competitive price point

Status of North America Business/Measures for Digital Business (Example)

Awarded a consulting project for cloud migration, digital transformation, and application modernization from a large bank in the US.

**Success Drivers
to Maximum Value**

Forward Vision

Deep Insights

Confident Speed

Consulting enables downstream work

Direct results of successful consulting advisory and delivery during Merger of Equals engagement:

- Support from MoE technology executive to open door for Cloud Migration in Insurance
- Cloud execution engagement across Insurance application footprint
- Sponsorship to invest in Global Provider status and Offshore Delivery Center build-out

Status of North America Business/Key Topics (Business Sell-off)

The planned sell-off of our non-core, non-digital business has been completed. Sales decline due to the sell-off has already been included in the plan.

Status of Business Sell-off

Completed divestiture
of staffing business
(July 1st)

Completed divestiture
of low-margin business
(June 16th)

Status of North America Business/Key Topics (Winning of Large-scale Projects)

NTT DATA won a three-year large-scale contract extension from a global hospitality giant as its IT outsourcing digital partner in July 2021.

Scope:

**Hybrid Infrastructure /
Intelligent Network,
Application Services,
Digital Transformation**



Partnering to enable a better customer experience by continuing to focus on Digital Transformation, Data & Analytics and Cloud Enablement

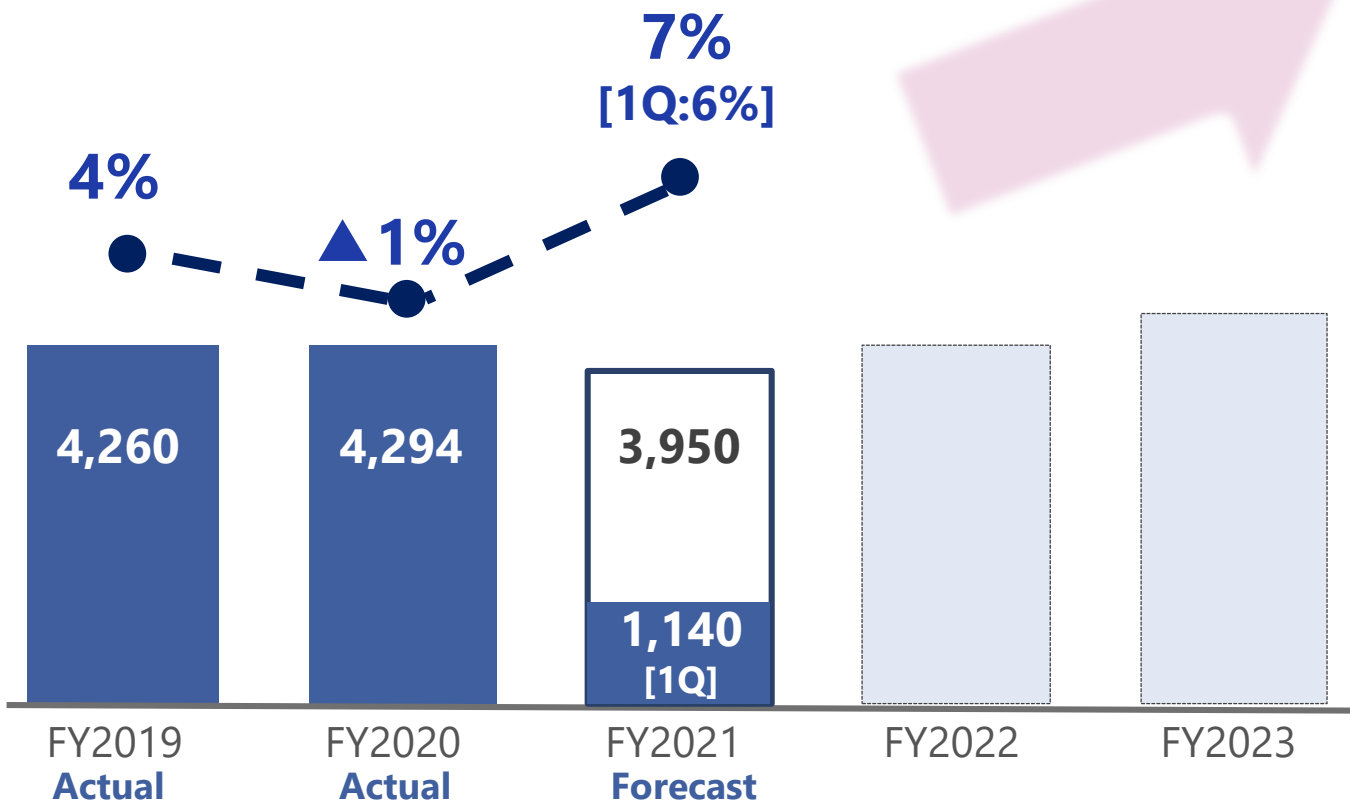
Executing day-to-day support and continued delivery excellence while providing consulting and innovative thought leadership

Status of North America Business/Prospects for Achieving an EBITA Margin of 7%

NTT DATA aims to transition to business domains centering on the digital field in order to catch up with the growth of the digital business market mainly in North America and achieve an EBITA margin of 7% in FY2021.

Unit = 100M JPY
[Local Currency = M USD]

EBITA%

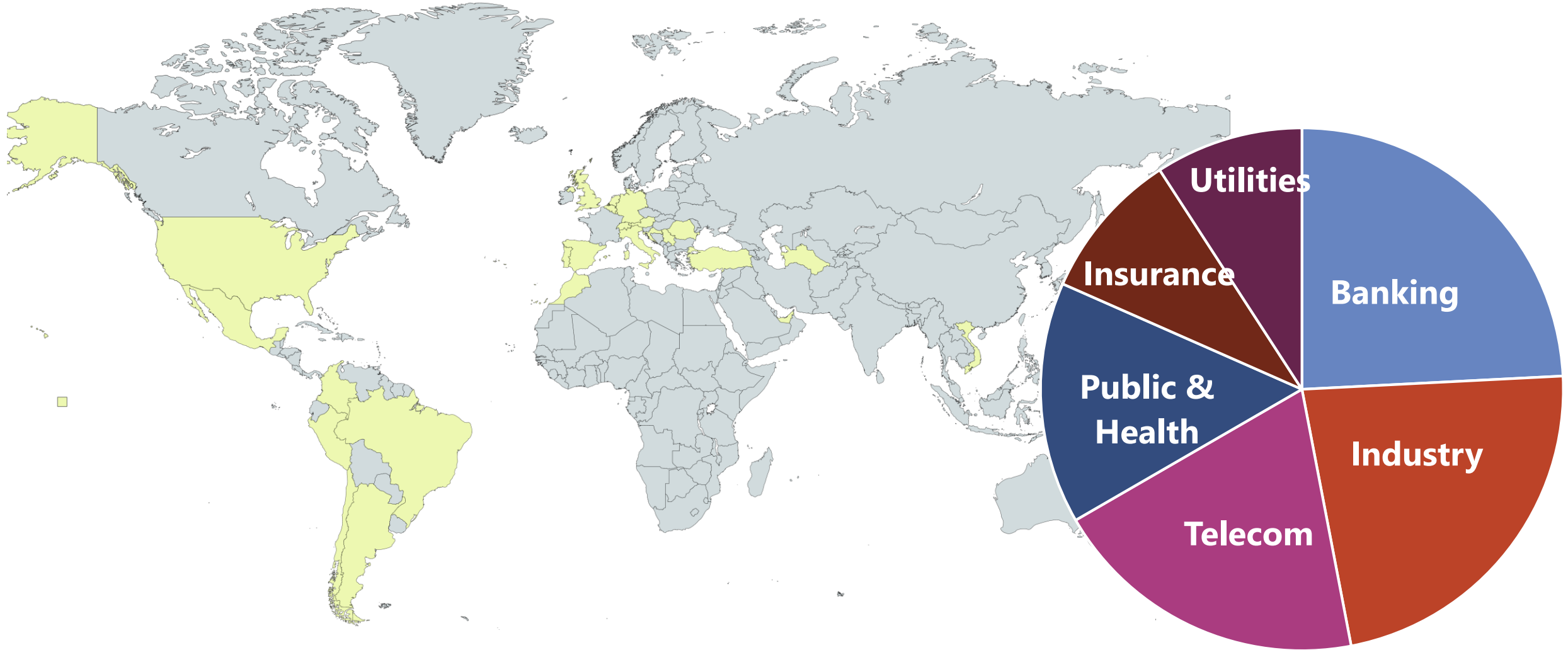


-  **Grow digital and consulting**
Improving profitability in traditional areas
-  **Strengthen digital capabilities by enhanced digital talent management**
-  **Accelerate portfolio reshaping for continuous business domain transformation**

Status of EMEA & LATAM Business

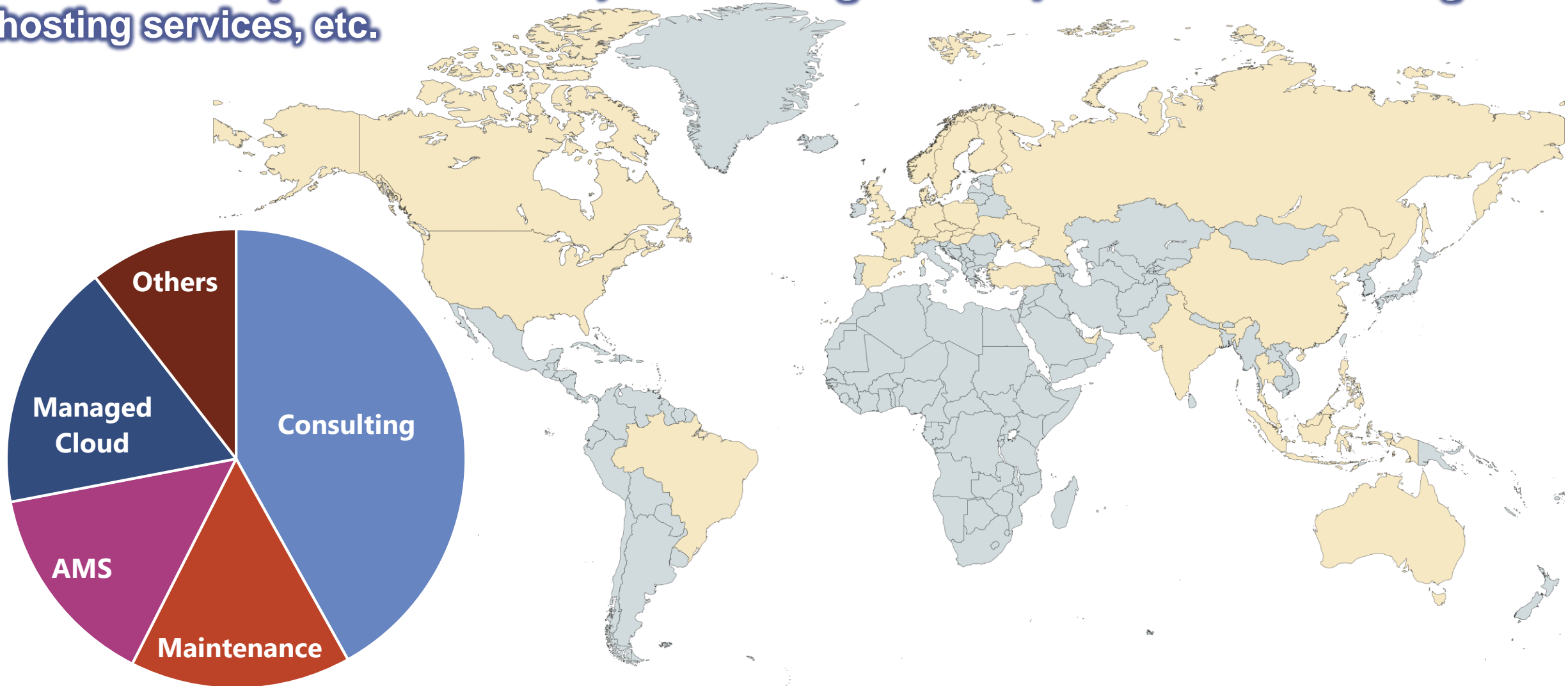
Status of EMEA & LATAM Business/Key Business Contents (NTT DATA EMEAL)

To our main clients in the banking, telecom, public, and global manufacturing sectors, NTT DATA offers a wide variety of IT services such as consulting, system integration, and outsourcing in Europe, Middle East, Africa, and Latin America.



Status of EMEA & LATAM Business/Key Business Contents (NTT DATA Business Solutions)

NTT DATA operates a consulting business concerning SAP, system integration, and software development businesses, and licensing business, and offers outsourcing /hosting services, etc.



Status of EMEA & LATAM Business/Structural Transformation Initiatives and Outcomes

FY2020: The effects of structural transformation implemented in FY2019 began to emerge and helped us seize more digital projects.

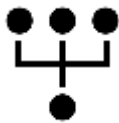
FY2021: Aiming for an EBITA margin of 7% in FY2023, NTT DATA will consolidate brands and bring operating companies under the same management.

FY2020 Outcomes

Response to new business opportunities based on the outcomes of FY2019

Continuing structural transformation to seize business opportunities

FY2021 Issues and Status of Progress



Enhancing the value offered to clients through the consolidation of global brands and integration of operation companies

- Being implemented towards integration as planned
“NTT DATA EMEAL” was established, consolidating business operations in the EMEAL region.



Strengthening capabilities to respond to the rapid digital shift in the market and changing work styles

- Various measure being implemented as planned
Optimizing offices according to the change in the work style, etc.



Further expanding the digital business by enhancing digital talent and assets

- Being implemented as planned
Winning more digital projects by enhancing digital talent and other means.

Status of EMEA & LATAM Business/Measures for Digital Business (Digital Strategy)

NTT DATA will continue to strengthen our capabilities to offer key digital portfolio and roll out consulting business using digital assets we have cultivated by offering investments.

DIGITAL ACCELERATION PORTFOLIO

- Cloud transformation
- Data & Intelligence
- Cybersecurity
- Automation



Digital Asset

- Develop an ecosystem for all digital assets (everis syntphony)



Consulting



Digital



IT and Business Solutions/
Long-term Contracts

Status of EMEA & LATAM Business/Measures for Digital Business (digital talent)

Against a backdrop of pressing digital talent shortage, NTT DATA is working to develop digitally skilled personnel and improving work styles in order to retain talent, along with the efforts to acquire new digital talent.

Attraction: Personalization & Human Connection

Personalization is driven by local talent markets and technological segmentation. Make visible human connection is key in the employer branding strategy.



Florian Sölch • 1st
Pathfinder for your customer centered digital future!
2w ...

Im Umfeld CX wachsen wir wie wild, mit vielen spannenden Themen und technologischen Schmeckern!
Wenn du dabei sein willst, ich freue mich auf deine Kontaktanfrage!

JOIN AS PATHFINDER
FOR A HUMAN-CENTERED CONNECTED FUTURE

Hire a Pathfinder!
Aktiviere dein Netzwerk und empfehle uns als Arbeitgeber weiter

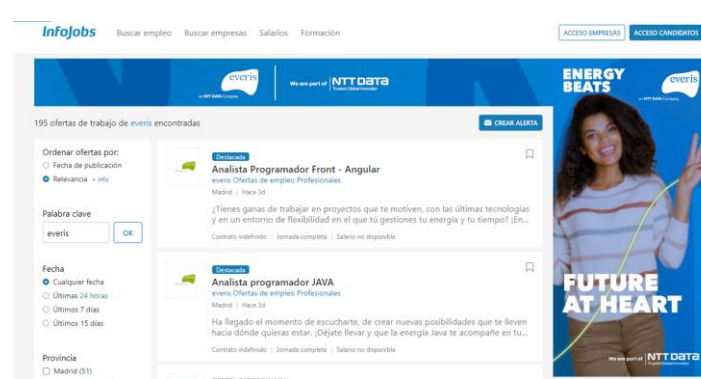
See translation

Like · 16 | Reply



Engagement: Flexibility & Nurturing People Energy

BeFlex Framework for the new ways of working. Create massively career opportunities for current digital talent. Evolve Leadership Mindset to nurture people **Energy**



Infojobs Buscar empleo · Buscar empresas · Salarios · Formación

195 ofertas de trabajo de everis encontradas

Ordenar ofertas por:
Fecha de publicación
Relevancia - más

Palabra clave
everis

Fecha
Cualquier fecha
Últimas 24 horas
Últimos 7 días
Últimos 15 días

Provincia
Madrid (51)

Analista Programador Front - Angular
everis Ofertas de empleo Profesionales
Madrid · Hace 3d
¿Tienes ganas de trabajar en proyectos que te motiven, con las últimas tecnologías y en un entorno de flexibilidad en el que tú gestiones tu energía y tu tiempo? ¡En...
Contrato indefinido · Jornada completa · Salario no disponible

Analista programador JAVA
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Ha llegado el momento de escucharte, de crear nuevas posibilidades que te lleven hacia donde quieras estar, ¡Déjate llevar y que la energía Java te acompañe en tu...
Contrato indefinido · Jornada completa · Salario no disponible

ENERGY BEATS

FUTURE AT HEART



Status of EMEA & LATAM Business/Key Topics (Winning of Digital Projects)

Signed a framework contract with an European institution to support the implementation of its strategic plan for digital transformation

NTTD EMEAL leads the Digital Transformation at an European institution



**NTT DATA EMEAL
delivery model
Digital
Transformation,
Implementation and
Maintenance**

NTT DATA EMEAL success case, part of the **European Organizations Global Account** with everis leading the consortium (70%) collaborating with NTT Data Germany & Romania. Consolidating our Intellectual Property position as NTT Data together with NTT Data Japan

Status of EMEA & LATAM Business /Key Topics (Winning of Digital Projects)

NTT DATA won a five-year contract to develop a MaaS platform, which involves requirements definition, system construction, roll-out, and operation, from Renfe, the railway company fully owned by the Spanish government.

RaaS: Renfe as a Service

Mobility service of the Spanish public rail transport company for multimodal transportation by means of a single digital platform.

renfe



TCV
40M€

CAPABILITIES:

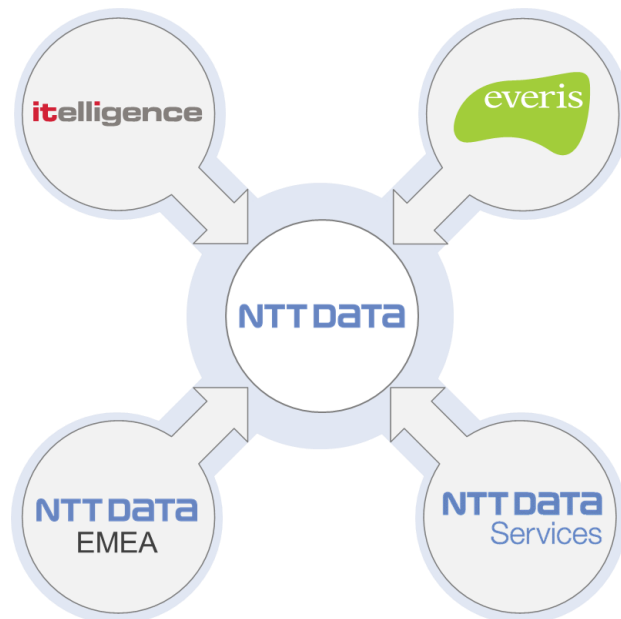
- Multidisciplinary teams strategy
- Digital Experience
- Transportation
- Digital Marketing
- Technology

Status of EMEA & LATAM Business/Measures for Digital Business (EMEAL Integration)

After the brand consolidation of everis and itelligence on April 30, 2021, NTT DATA established NTT DATA EMEAL, the company bringing the EMEAL region* under the same management. As One NTT DATA, we will offer optimal and more valuable services to clients.

April 30, 2021

Brand consolidation of everis and itelligence



September 14, 2021

Newly establishing the NTT DATA EMEAL to bring the EMEAL region under the same management

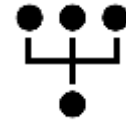
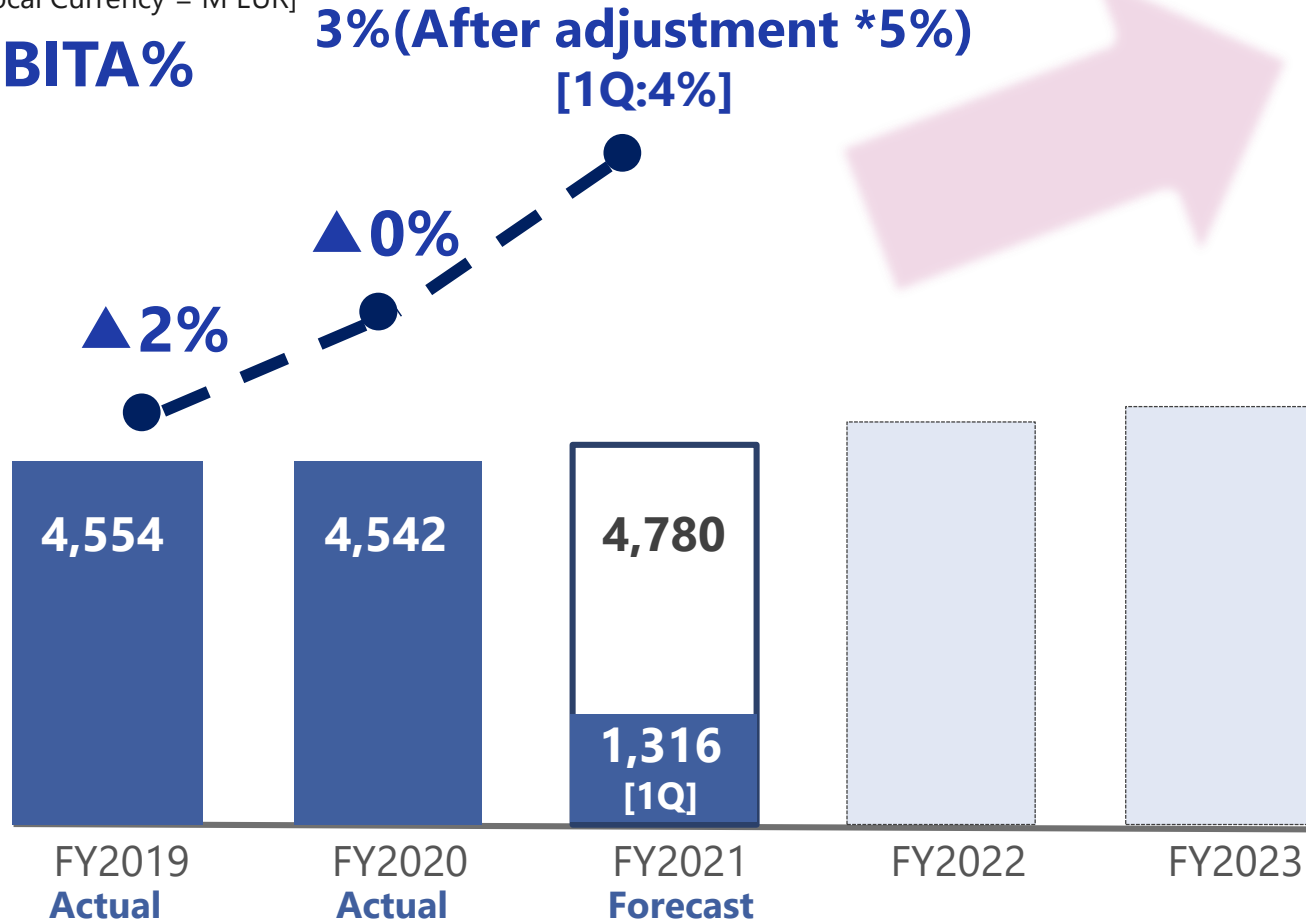
*EMEAL : EMEAL stands for Europe, Middle East, Africa and Latin America.

Status of EMEA & LATAM Business/Prospects for Achieving an EBITA Margin of 7%

Through the consolidation of global brands and the integration of operating companies, NTT DATA will work to enhance our presence, promote business synergies, and optimize the operation model in order to achieve an EBITA margin of 7% in FY2023.

Unit = 100M JPY
[Local Currency = M EUR]

EBITA%



Enhancing the value offered to clients through the consolidation of global brands and the integration of business companies



Strengthening capabilities to respond to the rapid digital shift in the market and changing work styles.



Further expanding the digital business by enhancing digital talent and assets

*Adjusted target figures that exclude temporary costs such as M&A and structural transformation.



NTT DATA

Trusted Global Innovator