

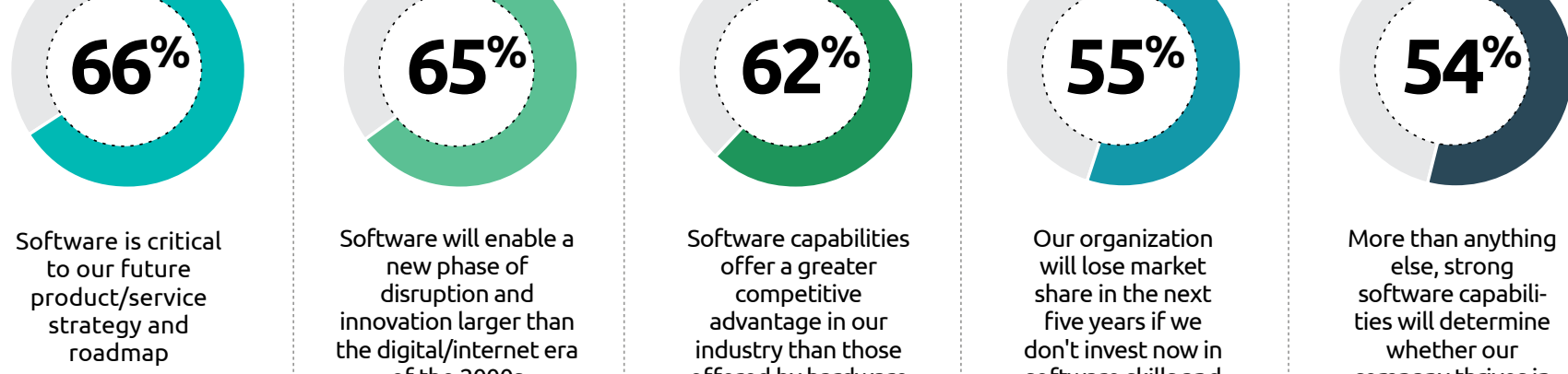
The art of software

THE NEW ROUTE TO VALUE CREATION ACROSS INDUSTRIES

Software is redefining the future of organizations – their competitive advantage and the markets they operate in

Software is fundamentally changing the way businesses operate

% OF ORGANIZATIONS AGREEING TO THE STATEMENTS BELOW...

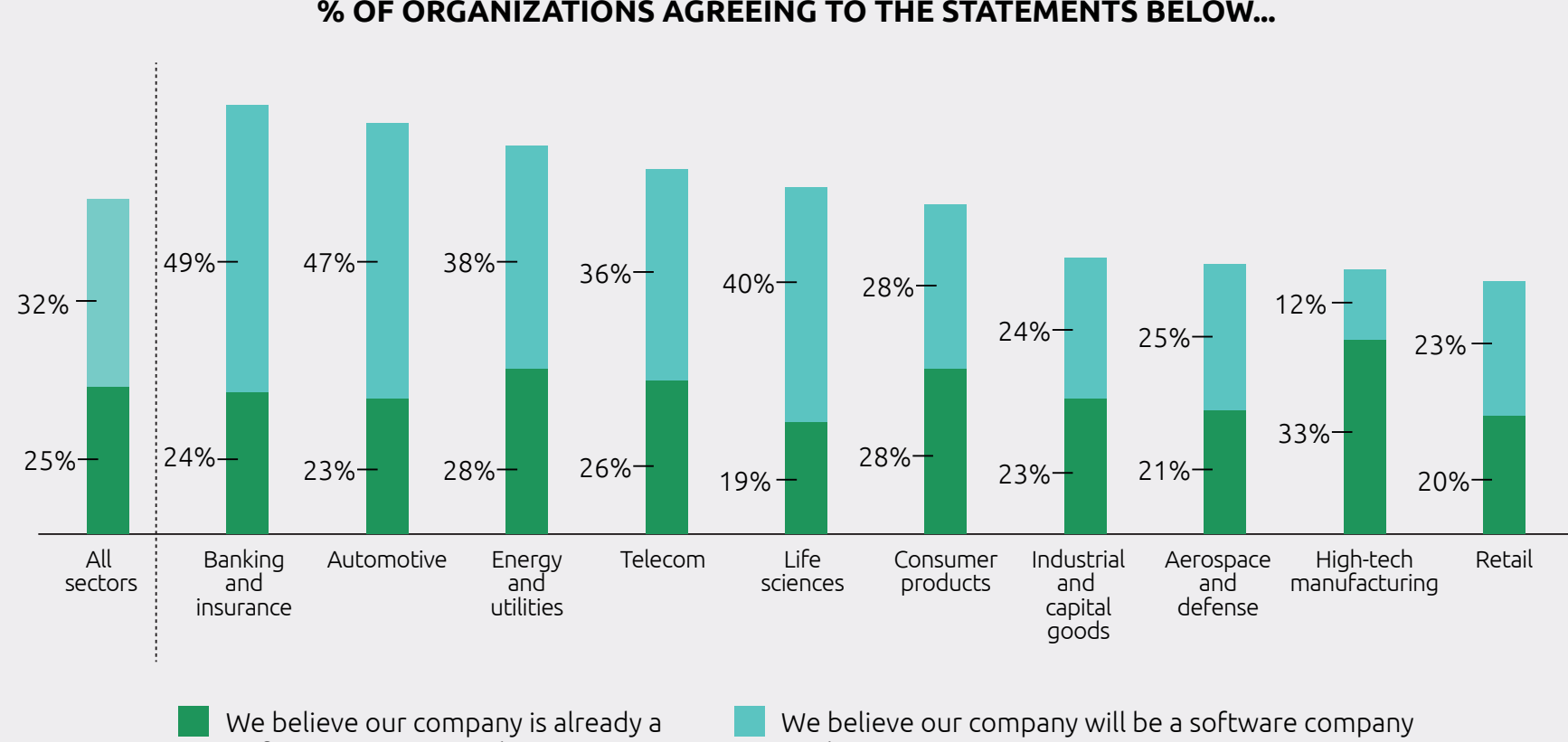


Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,500 organizations.

The imperative of software adoption has driven organizations to transform themselves into software companies

One in four organizations from traditional sectors already considers itself to be a 'software' company*

% OF ORGANIZATIONS AGREEING TO THE STATEMENTS BELOW...

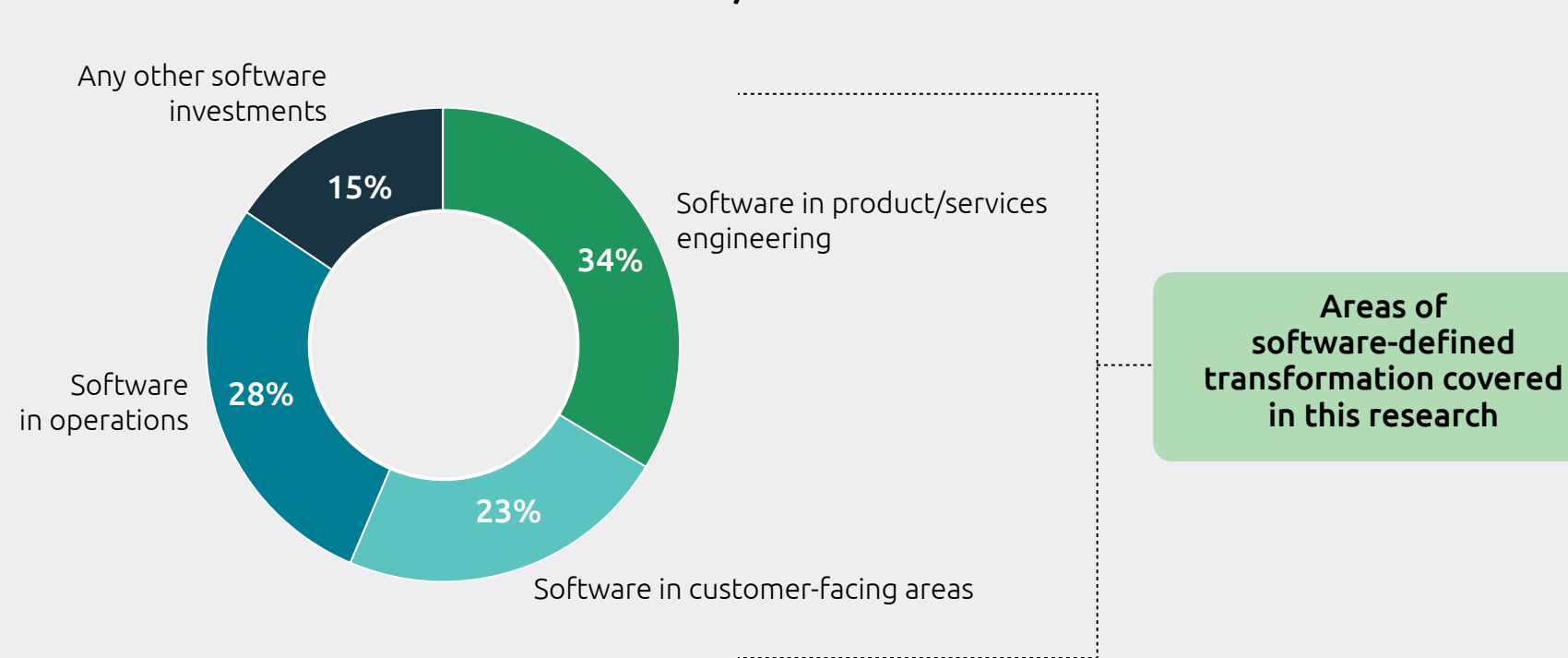


*By "being a software company," we mean that organizations are reconstructing their business models around software and, in doing so, transforming their business processes, organizational structures, and revenue models.

Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,500 organizations.

More than one-third of software investments focus on product or services engineering

SOFTWARE INVESTMENTS, SPLIT BY FUNCTIONAL AREA

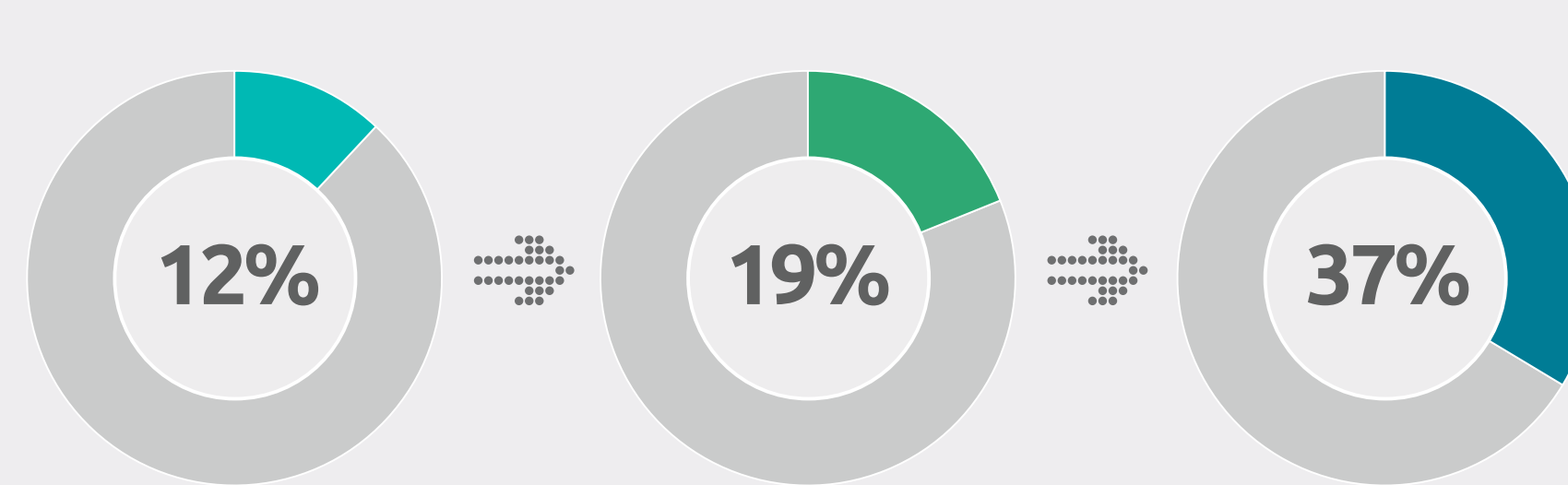


Areas of software-defined covered in this research

Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,500 organizations.

In the next 12 months, organizations expect 1 in 5 lines of code to be generated with assistance from Generative AI

% OF CODE GENERATED THROUGH ASSISTANCE FROM GENERATIVE AI



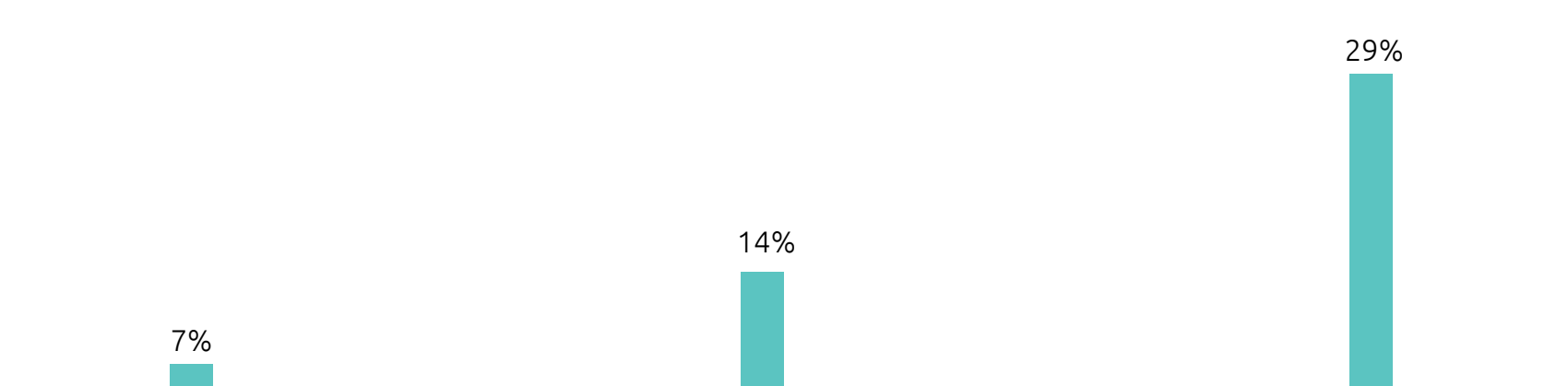
Note: "Currently" represent as of survey date, next 12 months or next 3 years are from the survey date.

Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,500 organizations.

Successful transformation has immense revenue potential – quadrupling by 2030

Organizations' software-based revenue as a share of total revenue is expected to grow to around 30 percent by 2030

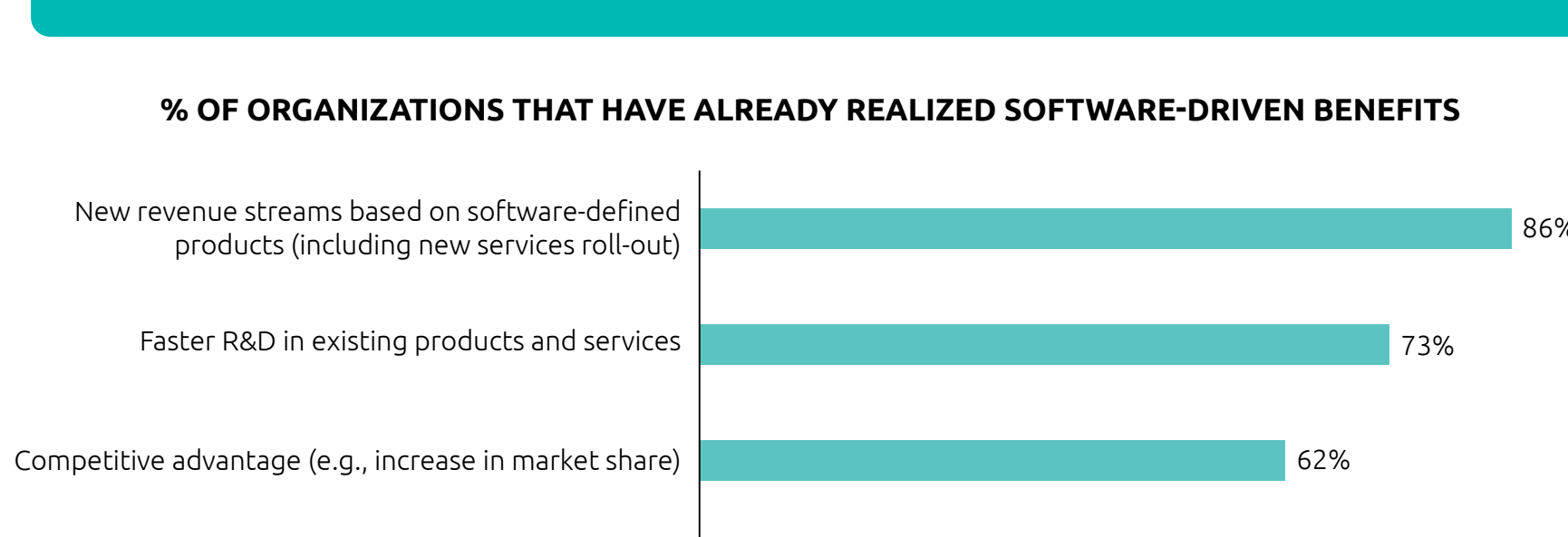
SOFTWARE AND DIGITAL SOLUTIONS REVENUE AS A % OF TOTAL ORGANIZATIONAL REVENUE



Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,350 organizations that have/are building a strategy to become a software-driven organization, with a focus on software-defined products/services.

Several organizations have already realized significant software-driven benefits

% OF ORGANIZATIONS THAT HAVE ALREADY REALIZED SOFTWARE-DRIVEN BENEFITS

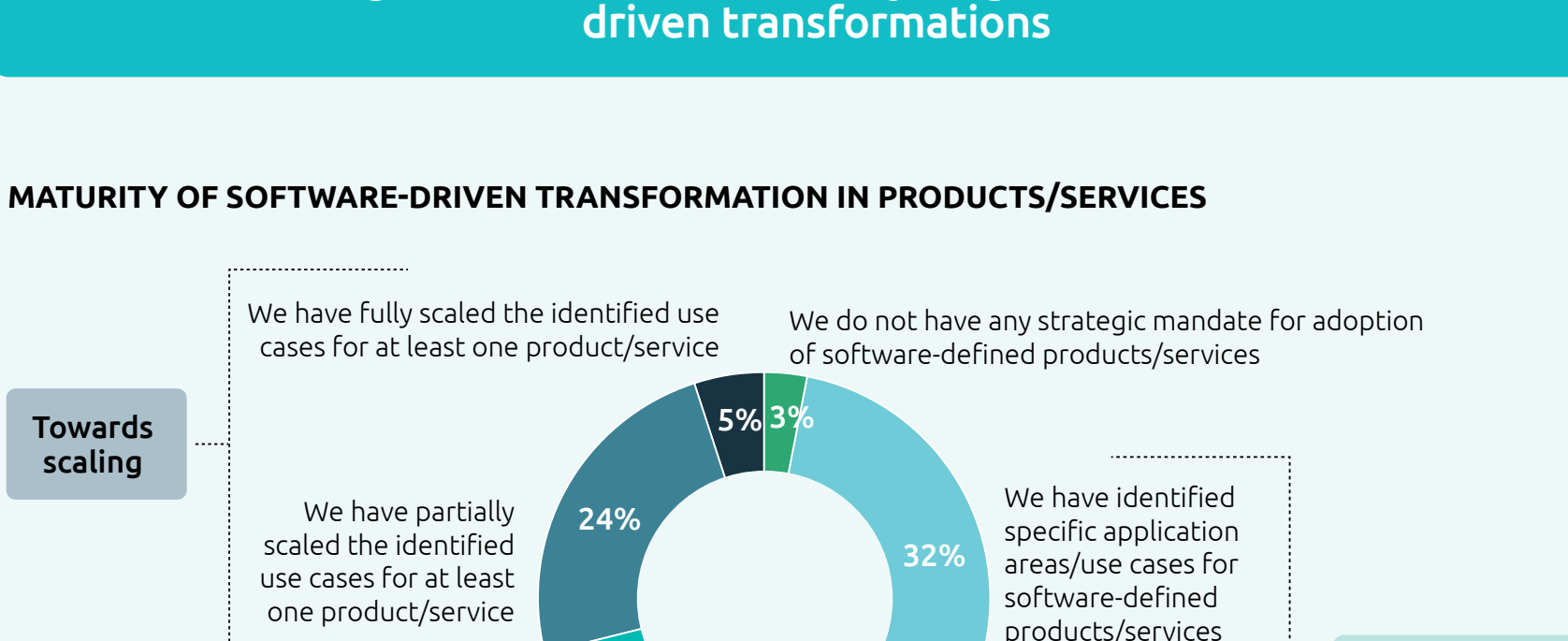


Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,350 organizations that have/are building a strategy to become a software-driven organization, focusing on software-defined products/services.

How to realize a successful software-driven transformation

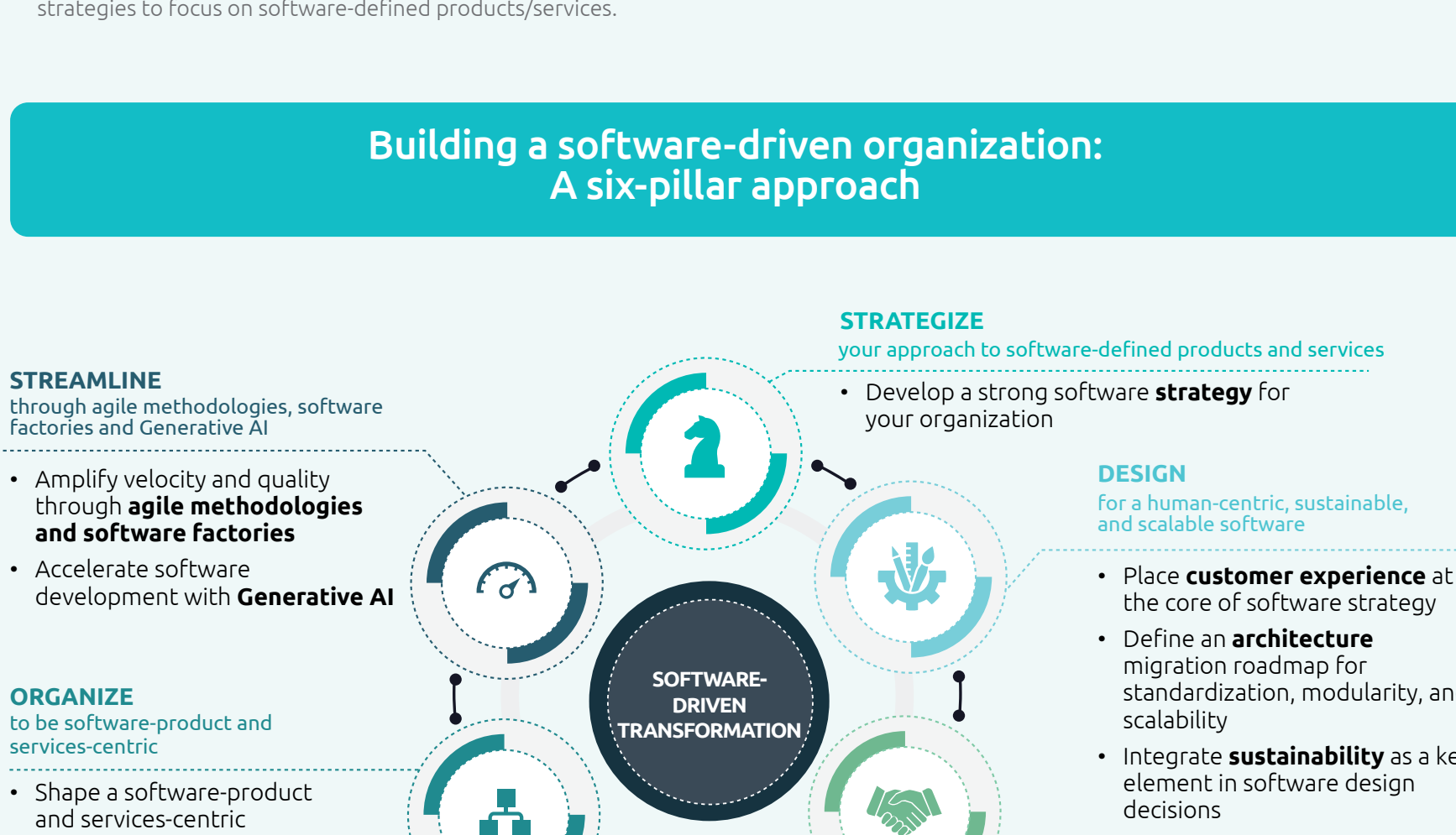
Most organizations are in the early stages of their software-driven transformations

MATURITY OF SOFTWARE-DRIVEN TRANSFORMATION IN PRODUCTS/SERVICES



Source: Capgemini Research Institute, Software-driven transformation survey, June-July 2023, N = 1,350 organizations that have/are building strategies to focus on software-defined products/services.

Building a software-driven organization: A six-pillar approach



Source: Capgemini Research Institute analysis.

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