

Business Expansion Driven by Consulting

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CRO

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With over 35 years' experience in both Japanese and international IT services and consulting companies, he has held various leadership positions. Served as President and CEO of NTT DATA Global Solutions and as Japan Representative of Infosys before joining Fujitsu in 2019 as Vice Head of the Enterprise Business Group.

From 2020 onwards, he led the Enterprise Business Group, spearheading the establishment of an organization that executes One Delivery on a global scale. Beginning in 2022, as Head of the Global Customer Success Business Group, he integrated the manufacturing, distribution, and financial sectors, driving business growth with over 1,300 major companies.

In 2023, he was appointed as Chief Revenue Officer (CRO). Since 2024, he has been serving as Executive Vice President, Chief Operating Officer (COO), and CRO, driving global growth strategies based on customer focus and an aim to maximize revenue.

The CRO Way

Transforming People, Services, and
Sales Methods to Maximize Value and Revenue
Authored by Shunsuke Onishi | Released June 2025



CRO Key Agenda

Implement 6 transformations to achieve continuous customer success and maximize revenue.

Six Transformations

Maximizing Value and Revenue

1 Portfolio

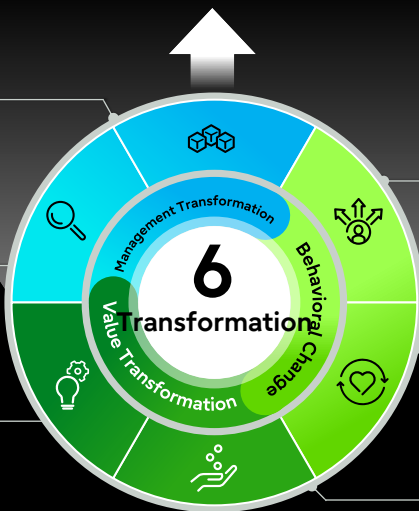
- Business model/portfolio
- Account portfolio

2 Insights

- Data-driven management
- VoC (Voice of Customer)

3 Capability

- Uvance Wayfinders
- Technology



Behavior

4

- Accountability
- Leadership

Intimacy

5

- Customer engagement
- Market alignment

Economics

6

- Value Based Pricing

Scope of the CRO

Entire Business Portfolio



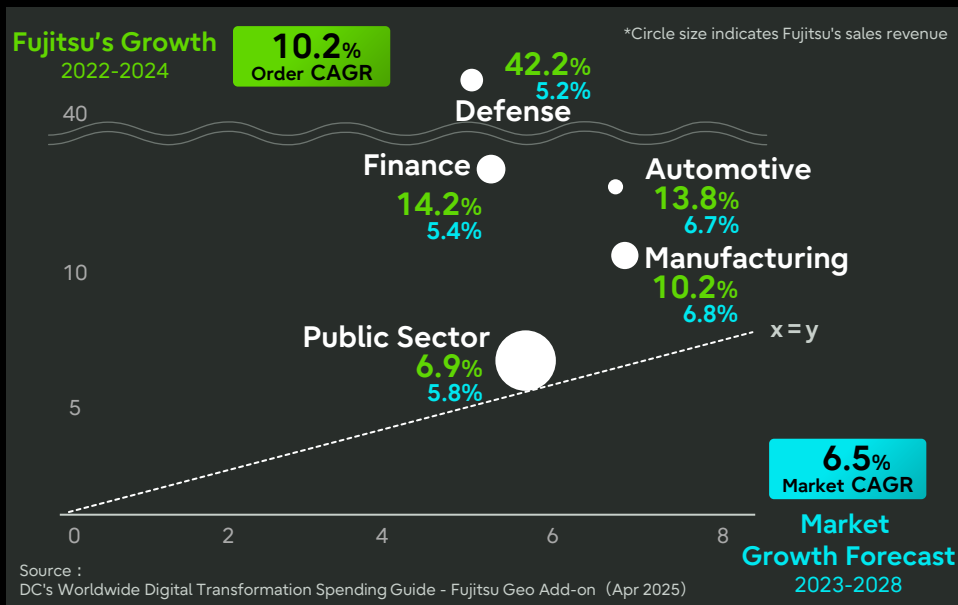
Fujitsu's Growth Exceeding the Market

Domestic Market Trends and Performance Trajectory by Industry



- The domestic IT market is expected to continue expanding further.
- Fujitsu's orders have exhibited growth that has exceeded market expansion since FY2022. This growth is particularly notable in the finance, automotive, manufacturing and defense sectors.

Industry-specific IT Market Forecast & Fujitsu's Growth



Key Points

Japan's IT market is steadily growing

While short-term impacts from Trump tariffs are anticipated, the degree of impact varies by industry

6.5%

Market CAGR 2023-2028

Finance, automotive, manufacturing, and defense sectors are growing at rates significantly surpassing the market

10.2%

Order CAGR 2022-2024

Further increasing market share to solidify market dominance

Reference : FY2024 Japan IT Service Market Share

Manufacturing: **1st**

Government /Public Sector: **2nd**

Distribution: **2nd**

Finance: **3rd**

Domestic Market Trends and Performance Trajectory by Business Segment



- The DX/IT services market in Japan is expected to experience substantial ongoing expansion.
- Uvance and Modernization are achieving order growth at a rate that exceeds market forecasts.

Market Forecast by Business Segment & Fujitsu's Growth

Fujitsu's Growth 2022-2024

*Circle size indicates Fujitsu's sales revenue

Modernization

64.0%
20.0%

Uvance

55.0%
19.0%

17.1%
Market CAGR

DX/IT Service
Market
Growth Forecast
2023-2028

Source :
One-Market Data Uvance 2025 V2.00, Fujitsu One-Market Data (OMD) Uvance v1.0
IDC's Worldwide Digital Transformation Spending Guide - Fujitsu Geo Add-on (Apr 2025)
One-Market Data Global IT Market - Market Forecast 2024 V1.10
Legacy & Open Legacy Migration Market Trends 2024 Edition, Deloitte Tohmatsu Mick Economic Research Institute

Key Points

Demand for Modernization is expected to continue in the future.
Uvance is projected for further growth.

Both **Modernization** and **Uvance** are achieving growth rates significantly exceeding market growth forecasts

64.0%
Modernization
CAGR 2022-2024

55.0%
Uvance
CAGR 2022-2024

The revenue composition ratio for Service Solutions is also increasing

Portfolio transformation is progressing steadily

Further Business Expansion through Enhanced Consulting Capabilities

Capture Market Opportunities for Further Growth

- To drive further growth in Uvance and Modernization for key industries, strategic expansion into new markets and efficient client acquisition are paramount.
- Enhance the consulting strategy to optimize deal conversion rates and elevate average transaction values.

Value of New Deals

(FY2024 Result)

| (Million JPY) | Japan | International Regions |
|------------------------|-------|-----------------------|
| Existing Key Customers | 46 | 48 |
| New Customers | 17 | 19 |
| Average | 35 | 45 |



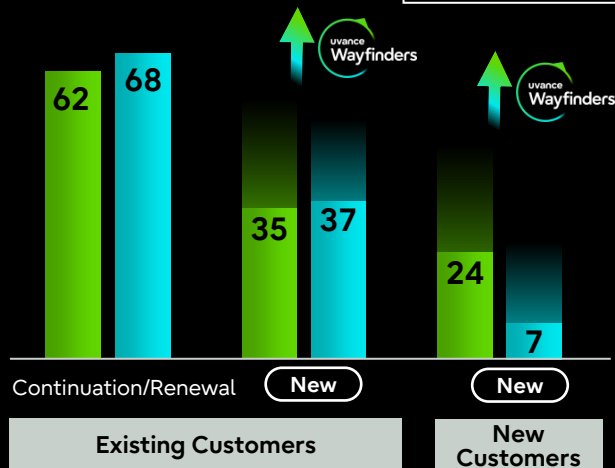
Conversion Rate*

(FY2024 Result)

■ Japan

■ International Regions

(%)



*The ratio at which the pipeline converts into business opportunities. The denominator includes cases such as customer project withdrawals.

Key Points

Increase scale of new deals

- Increase the scale of deals by directly approaching executive-class and senior management through business transformation initiatives.

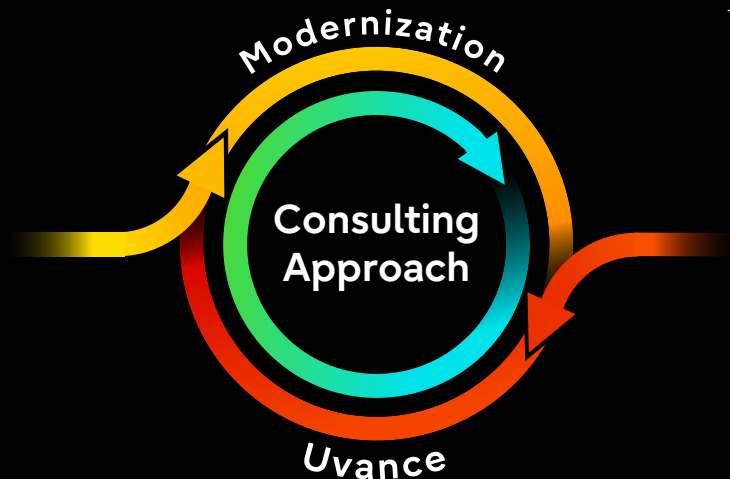
Accelerate growth and expand market share through new customer acquisition

- Deploy a structural approach towards transformation from any angle: Uvance, Modernization, or Consulting

Achieving unified growth through Consulting, Modernization, and Uvance

Unified Growth of the Trinity: Consulting, Modernization, and Uvance

- Strengthen the consulting approach to fully leverage the Modernization customer base and Uvance product capabilities.
- Ensure consistency in achieving fundamental transformation through a structural scenario that combines multiple transformation agendas.



Strengthening the Consulting Approach



Engaging directly with the key person driving business transformation



Navigating transformation as a "story"



Proposing practical solutions/landing points backed by technology

Further Strengthen High-Quality Consulting Talent



- Engage experienced senior-level leaders in each region to lead a high-quality group capable of developing new deals.
- Expand consultants internally and externally in alignment with focus areas and business domains.
- Wayfinders play a key role in enhancing the consulting capabilities of the Sales and Delivery Departments (Through continuous training, etc.)

Onboarding of Experienced Senior-Level Leaders



A High-Quality Team of Consultants

Expansion of business experts in each region progressing strategically



Japan
Region

Finance
Former Data & AI
Director, Ph.D.

Manufacturing
Former Competitor Consulting
Partner & Executive Officer
Data & AI



Americas
Region

Finance
Former Financial Company
CIO/CTO,
ITX, Data/AI

Automotive
Former Competitor Consulting
Partner
DX, IT Transformation



Europe
Region

Mfg. & Finance
Former Competitor Consulting
CEO/COO
ITX, DX

Finance & Mfg.
Former SaaS Company
Division Head

**Auto & Heavy
Industry**
Former Competitor Consulting
Partner
DX, ITX, Data/AI

Mfg. & Tech
Former Competitor Consulting
Senior Partner
ITX, Data/AI

Manufacturing
Former Competitor Consulting
Global Managing Partner
SCM



Oceania
Region

Finance & Mfg.
Former Competitor Consulting
Partner
Data & AI

Mfg. & Energy
Former Competitor Consulting
Partner
ERP, BPR, CM

Mfg. & Finance
Former Competitor Consulting
Partner, Ph. D
Data, Analytics/AI

Retail
Former Competitor Consulting
Partner
SCM, Merchandising

Finance & Retail
Former Competitor Consulting
Senior Partner
ITX, DX

Expansion of Consultants



Recruitment and Reskilling Aligned with Strategy

Actively expanding consulting expertise in Data & AI and Business Operations

**Strengthen Expansion
Across All Industries**

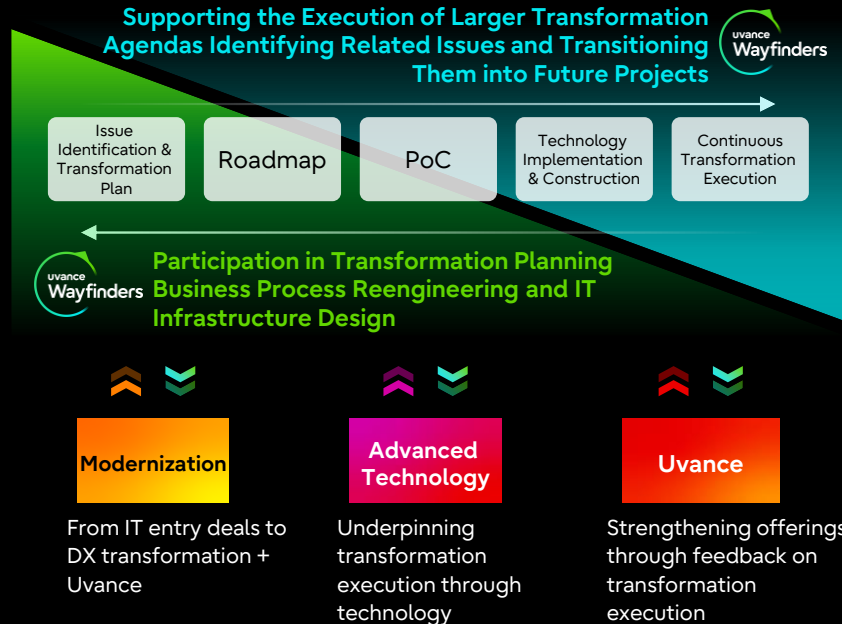
| | Data & AI | Business | 3S | Infra & Security |
|------------------|-----------|----------|--------|------------------|
| Finance | Person | Person | Person | Person |
| Manufacturing | Person | Person | Person | Person |
| Automotive | Person | Person | Person | Person |
| Distribution | Person | Person | Person | Person |
| Defense & Public | Person | Person | Person | Person |
| Common | Person | Person | Person | Person |

Revitalize Customer Approach / Strengthen Leads to Modernization and Uvance



Leverage Data and AI to develop transformation roadmaps based on industry insights and technology, execute comprehensive and critical transformation agendas through vertical integration.

Vertical Integration Approach



Data & AI

Full Utilization of AI for Consulting and Transformation Support *

- Enterprise Agentic Foundation -



*e.g. Development of consulting offerings for decision-making support AI using causal inference

Revitalize Customer Approach / Strengthen Leads to Modernization and Uvance

Increasing number of new deal cases in refreshed domains through vertical integration approaches.

Major Automotive Company (Americas)



**New
Customer**
×
New Deal

- Instead of traditional product sales, Wayfinders participate from SCM concept formulation
- Implement visibility and risk analysis of materials purchased globally, extending to business in the application domain

Product Sales
Approach



**SCM Concept
Formulation**



Extension to Application
Domain Business



**Combine industry and operational insights
to identify structural supply chain issues
and present AI-based solutions**

Major Manufacturer of Manufacturing Equipment (Japan, Americas, Asia)



**Existing
Customer**
×
New Deal

- Wayfinders Lead transformation planning by collaborating with executives on business DX and enterprise-wide digital twin initiatives, leveraging expertise in Data & AI.
- Extend into multiple offerings, including Uvance DX platform products and ServiceNow solutions.

Vice President &
Executive Meetings



**Tech-driven
Transformation Planning**



Data & AI, ServiceNow,
Multiple Uvance
Implementations



**Develop a roadmap for concept formulation
and technology infrastructure construction,
expanding to subsequent Uvance business**

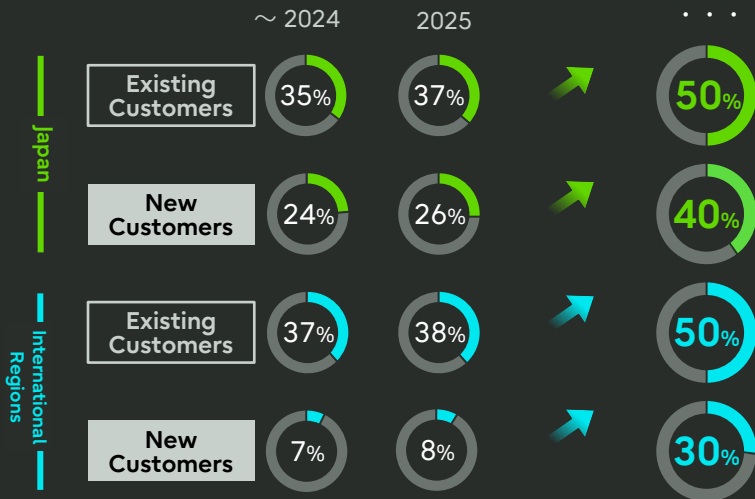
Future Outlook

Revitalize Customer Approach / Strengthen Leads to Modernization and Uvance

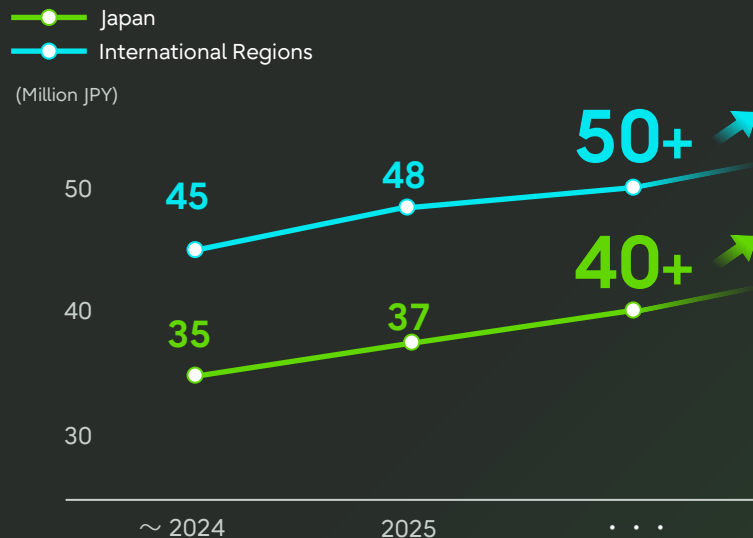
- Wayfinders provide high added value for customer transformation
- Expand company-wide consulting capabilities to boost conversion rates and deal values to further drive the growth of Modernization and Uvance.

Future Outlook

Increase Conversion Rate of New Deals



Increase Size of New Deals



Partnering with Customers to Venture into Uncharted Territories, Continuously Surpassing Market Expectations



Thank you

Cautionary Statement

These materials may contain forward-looking statements that are based on management's current information, views and assumptions and involve known and unknown risks and uncertainties that could cause actual results, performance or events to differ materially from those expressed or implied in such statements. Actual results may differ materially from those projected or implied in the forward-looking statements due to, without limitation, the following factors listed below.

- General economic and market conditions in key markets (particularly in Japan, Europe, North America, Oceania, and Asia, including China)
- Fluctuations in exchange rates or interest rates
- Fluctuations in capital markets
- Intensifying price competition
- Changes in market positioning due to competition in R&D
- Changes in the environment for the procurement of parts and components
- Changes in competitive relationships relating to collaborations, alliances and technical provisions
- Risks related to public regulations, public policy and tax matters
- Risks related to product or services defects
- Potential emergence of unprofitable projects
- Risks related to R&D investments, capital expenditures, business acquisitions, business restructuring, etc.
- Risks related to natural disasters and unforeseen events
- Changes in accounting policies