Vertical Markets – Strategy and Opportunity

Bob Weiler,
Executive Vice President,
Global Business Units
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Oracle Global Business Units
Over 22,000 employees focused on industry-specific products

• Dedicated global business units (GBU)
  – Product Development, Sales, Services
  – Deep industry domain expertise
  – Organized by industry

• Focused investment
  – $650+ million annual R&D investment in industry applications
  – Use Oracle technology, infrastructure, operations, and global scale
  – 30 acquisitions; target segment leaders

[Diagram showing industry segments: RETAIL, COMMUNICATIONS, HEALTH SCIENCES, FINANCIAL SERVICES, ENGINEERING & CONSTRUCTION, UTILITIES, HOSPITALITY (Recent MICROS Acquisition)]
Global Business Unit Portfolio

Industry-specific products run revenue-generating operations for customers

- **RETAIL**
  - Merchandise Management
  - Commerce
  - Store Operations
  - Supply Chain
  - Retail Analytics

- **COMMUNICATIONS**
  - Billing & Revenue Management
  - Service Fulfillment
  - Policy Management
  - Network Operations

- **HEALTH SCIENCES**
  - Clinical Trial Management
  - Drug Safety
  - Translational Research
  - Health Sciences Network

- **FINANCIAL SERVICES**
  - Core Banking
  - Insurance
  - Analytics & Risk Management

- **ENGINEERING & CONSTRUCTION**
  - Project & Portfolio Management
  - Capital Planning
  - Project Analytics

- **UTILITIES**
  - Billing & Revenue Management
  - Smart Grid
  - Infrastructure Management
  - Analytics

**HOSPITALITY** (Recent MICROS Acquisition)
- Revenue Management
- Reservations
- Property Management
- Point-of-Sale
- Enterprise Operations
- Fraud & Loss Prevention

Solving mission critical priorities for CEOs and senior business executives
Global Business Unit Performance
Leading each industry segment, growing faster than respective markets and taking share

- #1 in each industry
- 55 cloud offerings
- 74 major product releases in FY14
- Increased sales reps by 70%+ since 2010
- Increased sales productivity by 15% since 2010
- New Software License consistently growing faster
Industry-Specific Product Pull/Drag Effect with Oracle Stack

Opportunity to drive greater share of customer wallet in target industries

Joint Customer License and SaaS Deal

- GBU customers are increasingly standardizing on the Oracle stack
- Customers seeking to reduce costs by partnering with one vendor
- Natural cross-sell/up-sell sales synergy
  - CX ↔ Industry-specific products
  - Financials ↔ Industry-specific products
  - HCM ↔ Industry-specific products
  - SCM ↔ Industry-specific products
Micros Acquisition

Large Hospitality installed base to cross-sell and up-sell Oracle Applications and Technology

- #1 provider in Hospitality industry
- 330,000 customer sites worldwide
- Integrated software, hardware, and services
- Strong momentum in cloud
- Mobile and tablet solutions gaining significant traction
Oracle + MICROS Hospitality
Material pull/drag opportunity in Hospitality industry
The world’s most technically advanced sports venue

Enabled BYOD in-seat ordering for 75,000 spectators using Oracle’s MICROS mTablets and Simphony cloud software
Hardware and Software
Engineered to Work Together