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Accenture and the United States Army

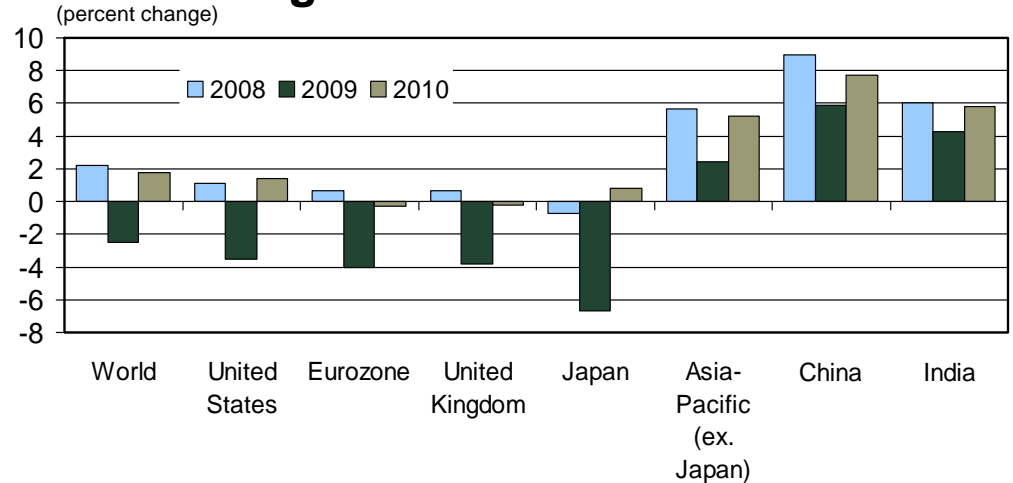
Global Business Challenges, Trends and Emerging Solutions

Global Economic Challenges Continue – But Forces of Recovery are at Work

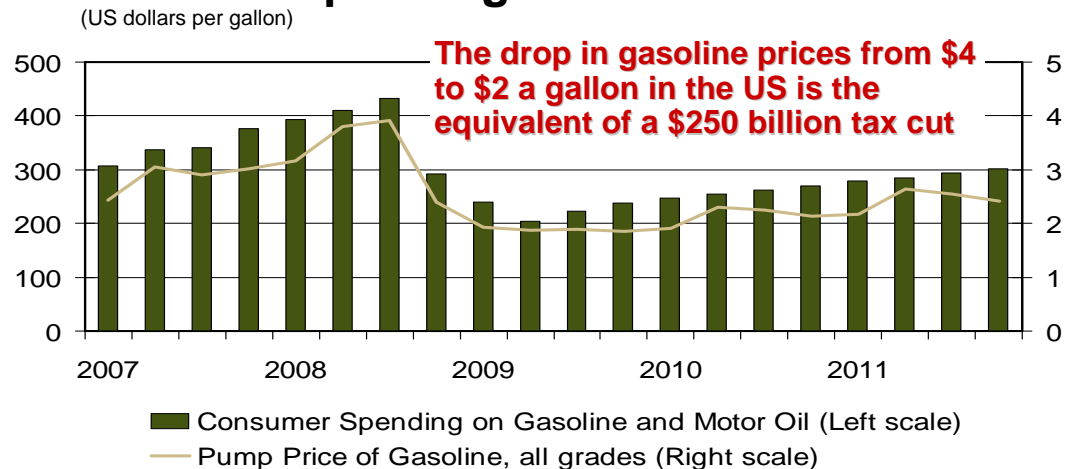
- World GDP expected to contract by over 2% in 2009.
- Global synchronized recession in advanced economies.
- Emerging markets not immune but affected in different ways.

- Forces supporting recovery:
 - Lower commodity prices
 - Fiscal stimulus programs
 - Low or near zero interest rates
 - Bail-out of troubled banks
 - Pent-up demand
- US and China likely to lead recovery

Real GDP growth



Gasoline spending: less of a burden



Economic Trends and Challenges are Impacting Business Priorities

- Shortened outlook and timescales
- Cutting costs beyond the normal
- Focus on customer impact
- Retaining and motivating employees
- Marketplace opportunities and competitive advantage



Four Key Imperatives Today

1. Rapid and Sustained Cost Management
2. Operational Excellence
3. Customer Acquisition and Retention
4. Effective Merger and Acquisition



Accenture Technology Vision: Four Trends Will Define Technology Landscape



Data & Decisions



**Internet
Computing**

Influencers



Millennials



Security



Sustainability



Mobility



Collaboration