

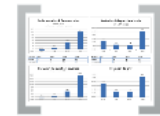
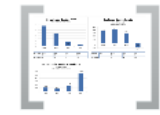
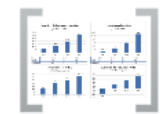


RESUMEN EJECUTIVO

RESUMEN EJECUTIVO

TURNKEY PROJECTS

PROYECTOS



IMPACTO EXPANSIÓN POR LICENCIAS

	2017	2018	2019	2020	2021	2022	2023
REVENOS	1,200	1,500	1,800	2,100	2,400	2,700	3,000
EXPENSOS	800	1,000	1,200	1,400	1,600	1,800	2,000
UTILIDAD	400	500	600	700	800	900	1,000

IMPACTO EXPANSIÓN POR NUEVOS SERVICIOS

PROYECTO "LAW-LIN VANG"

SOLUCIONES DE CONTRATACIÓN Y A TIENDE LOGÍSTICAS

4 PAVILLOYS DE APARTAMENTOS



BOLSA DE MADRID

catenon[®]

WORLDWIDE EXECUTIVE SEARCH

10° FORO MEDCAP
Mayo 2014



1. ¿Quiénes somos?



2. Nuestra industria. Un nuevo mercado... una gran oportunidad

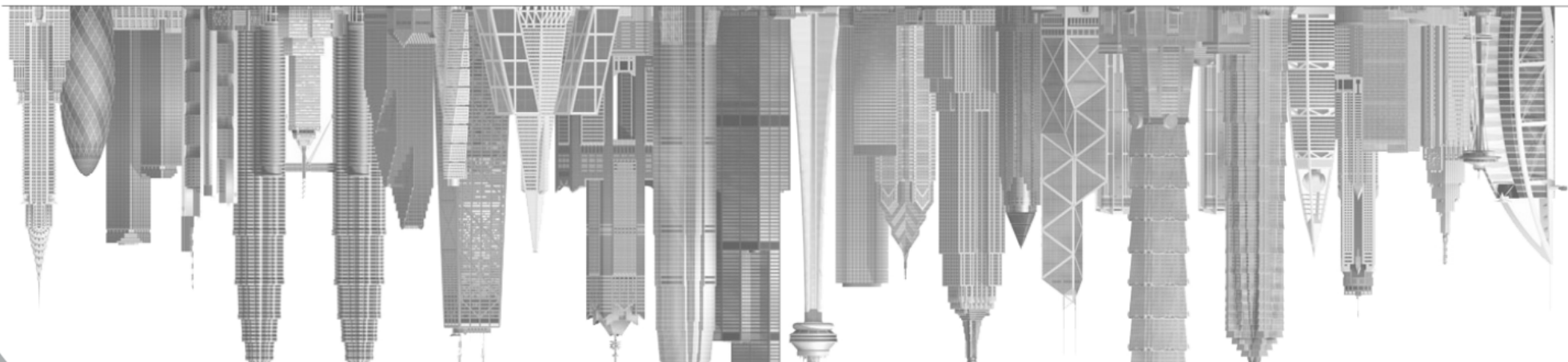


3. ¿Cómo afronta Catenon ese reto?

MODELO WEB 2 = Real x Virtual



4. Sigüentes pasos de la compañía: expansión por licencias y ampliación de servicios



1. ¿Quiénes somos?



Compañía de **base tecnológica** dedicada a la búsqueda y selección global de profesionales.

PRESENTES EN 14 PAÍSES Y ENFOCADOS DESDE LA UE A: ASEAN - GCC- LATAM



CON OPERACIONES EN MÁS DE 100 PAÍSES DE LOS 5 CONTINENTES



catenon
The world, just around
ONE PLANET ONE OFFICE

2. Nuestra industria.

Un nuevo mercado... una gran oportunidad



CÓMO OPERA?

fee

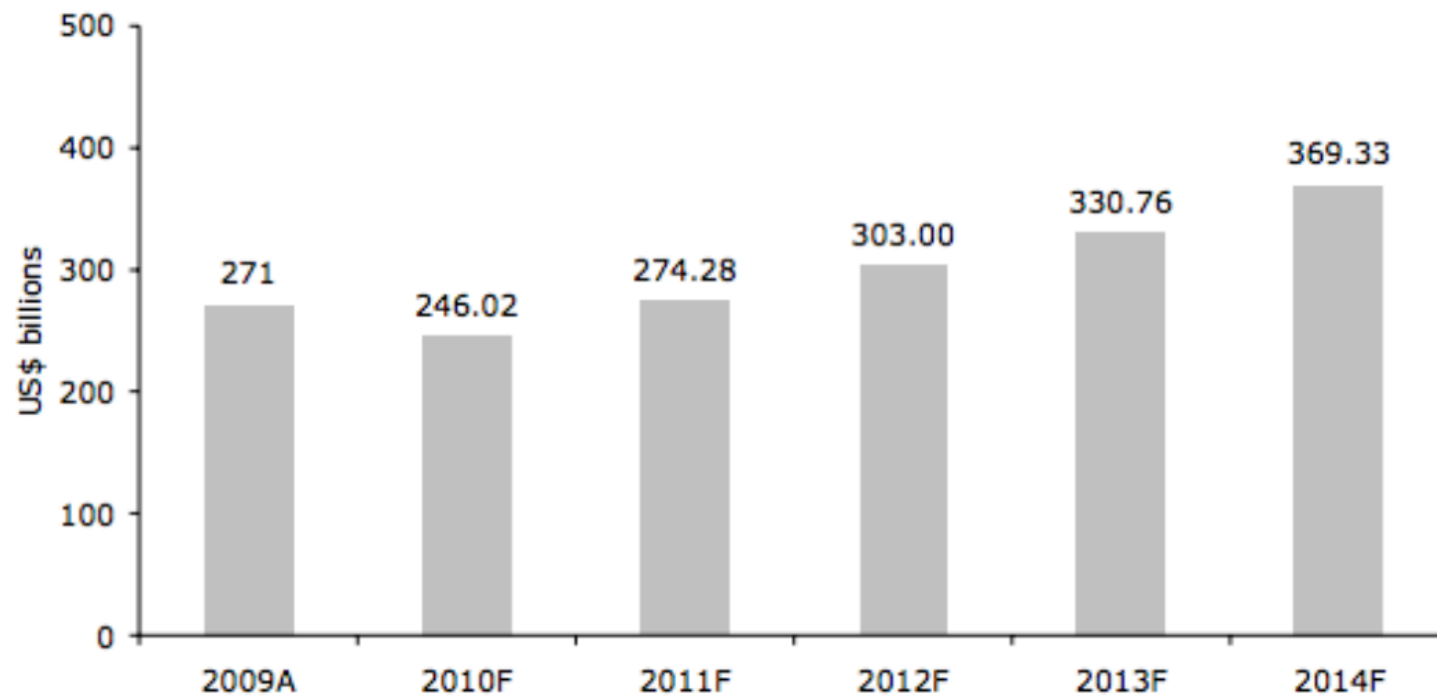


empresas • intermediarios • candidatos

INTERMEDIACIÓN & BASADO EN INFORMACIÓN

CUAL ES SU TAMAÑO?

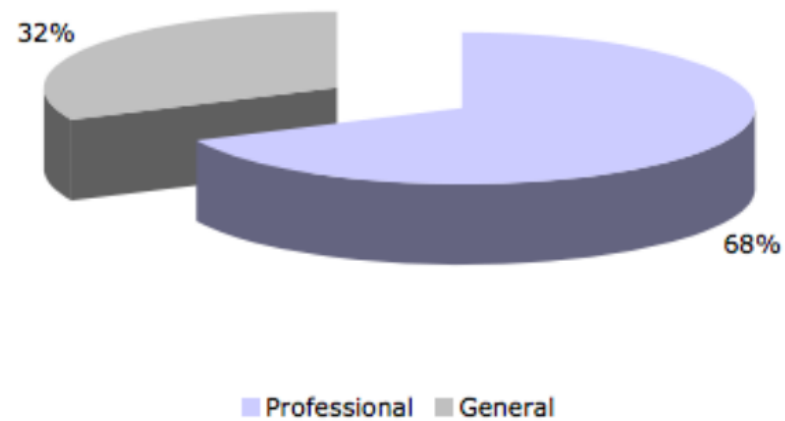
Figure 7.1: Global Recruitment Market Forecast: 2009-2014F



Source: Koncept Analytics

QUÉ PERFILES SE BUSCAN?

Figure 2.3: Global Recruitment Market by Employment Type, 2009

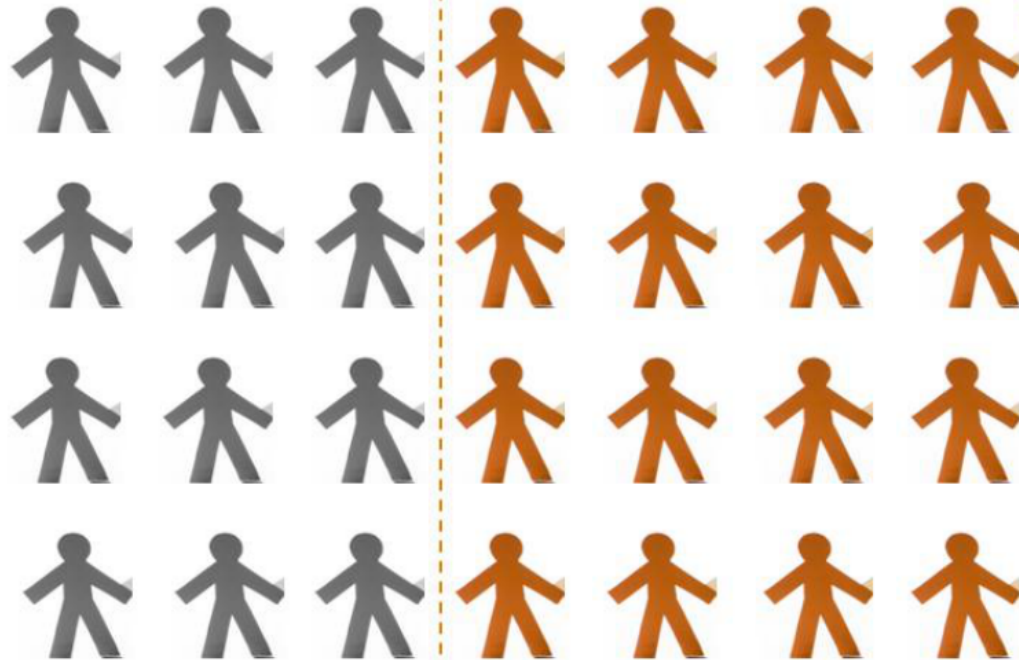


Source: Adecco estimates


CÓMO CRECE EL MERCADO?

65%

2.- POR ROTACIÓN



LOS PLAYERS ?... SXX

AÑO DE CONSTITUCIÓN	FIRMAS TRADICIONALES COTIZADAS		EQUITY VALUE
1978		LSE	€ 1.570 MM
1948		NYSE	€ 2.612 MM
1986		LSE	€ 1.619 MM
1953		NYSE	€ 354 MM
1969		NYSE	€ 248 MM



UNA INMENSA OPORTUNIDAD

**La búsqueda GLOBAL de profesionales
&
RPO GLOBAL**

SÍNTOMAS LOCALES...



Frankfurter Allgemeine

ZEITUNG FÜR DEUTSCHLAND

... according to the head of the German chamber of commerce and industry, Hans Heinrich Driftmann,

Germany is in urgent need of about 400,000 engineers and qualified workers, whose lack is knocking about one percent off the country's growth rate" Angela Merkel, German Chancellor.

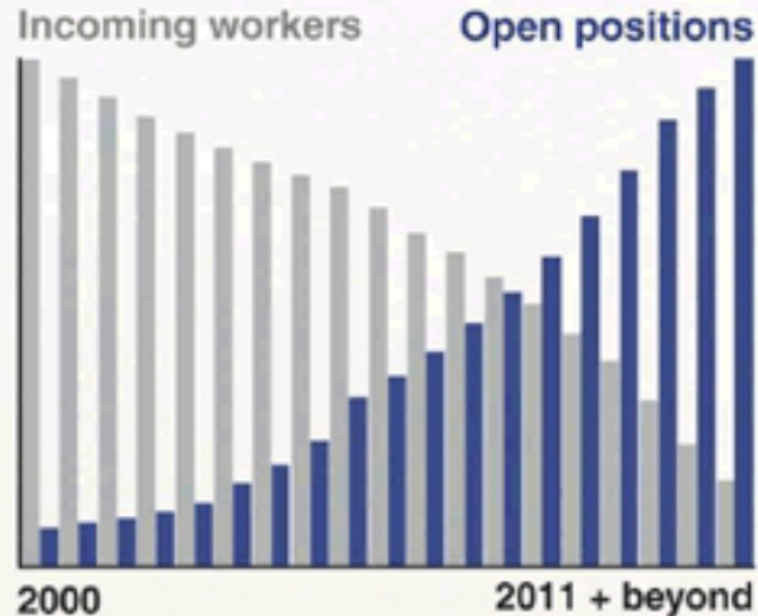
January 19, 2011

SÍNTOMAS LOCALES....

Demographic Challenges

- 15% fewer 35 to 45 year olds
- Baby Boomer Retirements
- Immigration is down and Female participation in workforce is at all time high
- US Growth 3% to 4%
- Global Growth even Faster

11 Million Worker Shortfall!!!



Demographic Challenges

- Vacated Jobs + Newly Created Jobs = 33 to 52 Million open positions
- 11M to 23M SHORTAGE of talent overall by the turn of the decade; Significant "war for talent" now in many arenas

- US Dept. of Labor

1970-1990 síntomas globales

EXPATRIACIÓN

1970-1990

International assignments are mostly driven by large multinationals based in the US and Europe. These organisations send talent from the HQ country out into the field to manage operations in other parts of the world. Many assignments are from the US into Europe, but oil and gas, mining, and other industries dependent on natural resources regularly send staff to more far flung destinations. Assignees are usually sent off for a two-to five-year period and are incentivised with attractive expatriate packages.



1990-2010 síntomas globales

MERCADOS EMERGENTES

1990-2010

Demand for global mobility of talent increases as new markets emerge for companies to sell their products and services, and also manufacture their goods at lower cost. Offshoring gathers pace. A new breed of mobile worker emerges alongside the expatriate and meets the globalisation demand through commuter, rotational, and technology-enabled virtual assignments. The flow of talent is still predominantly from West to East or intracontinental, but companies begin to tap into rich talent pools in emerging markets, particularly India.



PRICEWATERHOUSECOOPERS 

2020

síntomas globales

Future view

REVOLUCIÓN

2020

Global mobility continues to grow in volume. Within the context of closely aligned international regulatory frameworks, the growth of cross-border acquisitions by sovereign wealth funds, lingering public investments in private business concerns, greater security co-operation between nations,

and information technology that can identify and connect talent in an instant, global mobility becomes part of the new normal. Mobility of talent is fluid. For example, a Chinese company may engage a European team to manage an investment in Africa.



LA ECUACIÓN A RESOLVER



TECNOLOGÍAS PARA GESTIONAR EL CONOCIMIENTO

Captación candidatos



Valoración de candidatos

MODELO DE "PRODUCCIÓN INDUSTRIAL DEL SERVICIO"



MODELO DE NEGOCIO WEB2



TECNOLOGÍAS PARA LA CONECTIVIDAD TIEMPO REAL

MULTIMEDIA



SMART PHONES



MULTIMEDIA

The screenshot displays a recruitment software interface for a candidate named EDWIN TETSUYA OMURA. The interface is titled "Candidate Overview" and includes a navigation menu with "METHODODOGY", "SEARCH STRATEGY", "CANDIDATE OVERVIEW", and "SALARIES". The candidate's profile is shown with a video player, a resume summary, and a list of interview questions.

Candidate Overview JAPAN Regional Sales Representative

FILMED TECHNICAL INTERVIEW

EDWIN TETSUYA OMURA

EDWIN TETSUYA OMURA
Employment Operations Coordinator
Universal Studios
Company: Universal Studios
Education: General - Graduate
Languages: English, Japanese
Fixed Salary: 70000

PERSONAL ANALYSIS
Personal Analyst
Functional Experience

FILMED TECHNICAL INTERVIEW

1 Describe your current roles and responsibilities including business size and geographic scope.
0:0

2 How do you ensure that the operations of a project/business are functioning efficiently? What are the important aspects to be adhered to ensure the same?
0:30

3 How do you ensure Brand awareness amongst the target audience? What are the effects of branding in a franchise model of business?
1:00

4 How will you overcome conflict of interests with partners/franchisees without compromising the working relationship with them?
1:30

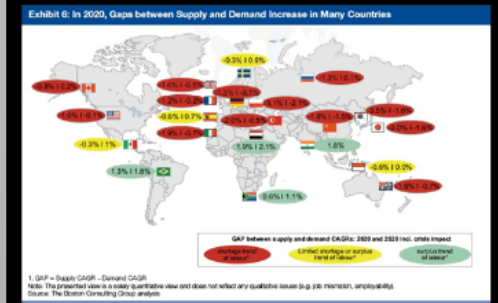
Navigation: Candidate overview, Professional Career, Competence Highlight Check, Personal profile, Competence per coordinates, **Filmed technical interview**, Comparative, All Candidates

...EN RESUMEN

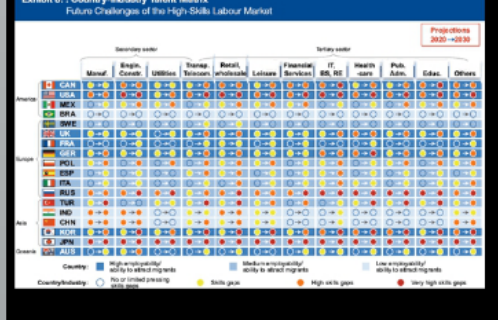
UNA NUEVA NECESIDAD EN EL MERCADO



Source: Global BCOWPMA report 2009 "Overcoming Payroll Advantage: How to Address HR Challenges Worldwide through 2010". Proprietary Web survey with responses from 10 countries and markets. The Boston Consulting Group (BCG) WPMA analysis.



1. GAP = Supply CAGR - Demand CAGR
Note: The presented view is a solely quantitative view and does not reflect any qualitative issues (e.g. job migration, unemployment).
Source: The Boston Consulting Group analysis.



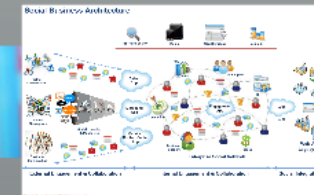
UN NUEVO CLIENTE DENTRO DE 4 AÑOS

ANALÓGICO



DIGITAL

SOCIAL BUSINESS



3. ¿Cómo afronta Cátenon ese reto?

MODELO WEB 2 = Real x Virtual

PLATAFORMAS TECNOLÓGICAS



KM Crawler®



CTC Catenon
Training Center®



Web²



Upick®



CATS Catenon
Application
Tracking System®



CQC Catenon
Quality Control



CRS Informe
Multimedia®

3. Cómo aportamos valor?

Por nuestro modelo de negocio:
"one planet, one office"

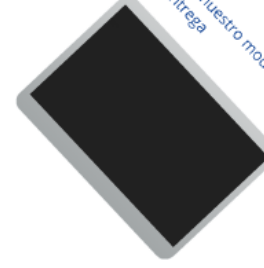


El modelo web2: "la producción industrial de un servicio"



catenon[®]
The smart global search
ONE PLANET. ONE OFFICE

por nuestro modelo de entrega



creamos valor en la localización del talento



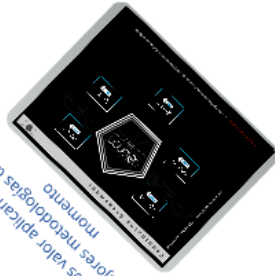
una oferta única: compartimos el conocimiento generado



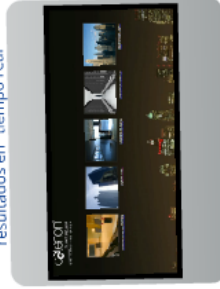
creamos valor por la objetividad y por la reducción de tiempos



creamos valor aplicando las mejores metodologías del momento



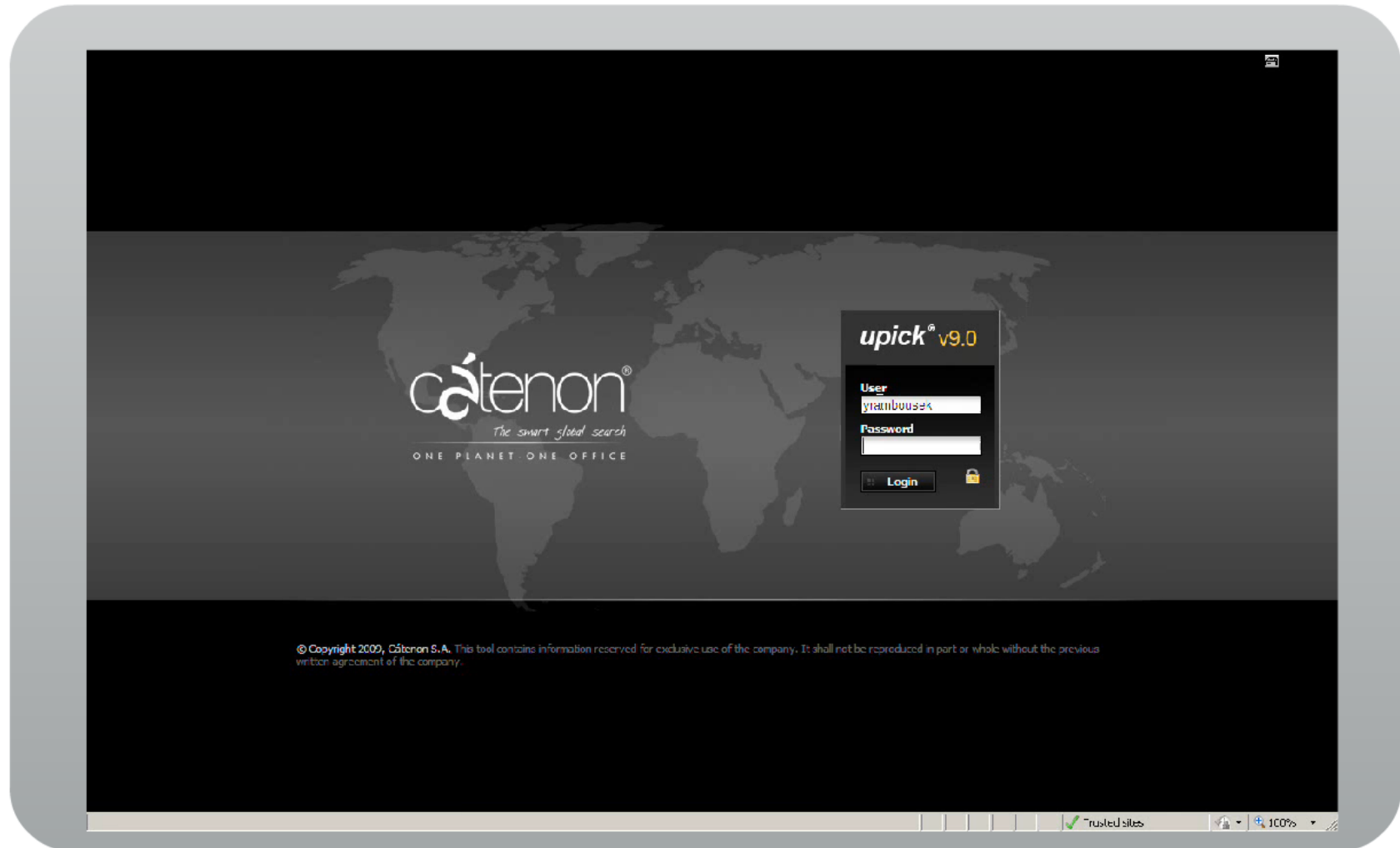
una oferta: compartimos resultados en "tiempo real"



una oferta única: demostramos la especialización en cada cliente



El modelo web2: "la producción industrial de un servicio"



por nuestro modelo de
entrega



**4. Sigüientes pasos de la
compañía: expansión por
licencias y ampliación de
servicios**

cátenon[®]

WORLDWIDE EXECUTIVE SEARCH

QUÉ TENEMOS?



AMBICIÓN



**MODELO DE
NEGOCIO
DIFERENCIAL**



**MODELO DE
ENTREGA
DIFERENCIAL**



**OFERTA
DIFERENCIAL Y
ÚNICA**



QUÉ NOS FALTA?



DIMENSIÓN



**POTENCIAR
BIGDATA & IAA**



**POTENCIAR
CLOUD
COMPUTING
SaaS**



**POTENCIAR
INTELIGENCIA DE
NEGOCIO**



**POTENCIAR
E-MKT CON
CANDIDATOS**

PARA QUÉ?

TURNKEY PROJECTS



HR
LOGISTICS

POR QUÉ?

DOBLE DÍGITO: 28%

The RPO market witnessed significant growth to reach US\$1.4 billion in annualized revenues in 2011

Growth of RPO market
Annualized US\$ billion



Some publicly announced deals that were signed in 2011 (in millions):

- Accenture - HCL, Nordic Ruby
- Accenture - U.S. Bank
- PricewaterhouseCoopers - IBM Business Partner, Oracle Financial and Customer Care
- The Right Thing - Chrysler Group

Source: Everest Group (2012)

Copyright © 2012 Everest Group, Inc. EGR-2012-3-A-0509

GLOBAL

The high interest around multi-country RPO (MCRPO) is finally translating into actual deal activity

MCRPO growth
Number of new deals

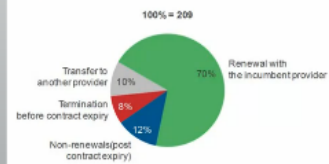


Source: Everest Group (2012). Data is based on a survey of RPO providers in the U.S. and Europe available only to clients of Everest Group. Everest Group (2012)

Copyright © 2012 Everest Group, Inc. EGR-2012-3-A-0509

RECURRENT

Deal renewal activity in 2010-2011
Number of deals



Sample size: 209 RPO deals that were up for renewal between 2010 and September 2011

Source: Everest Group (2012)

Everest Group

Copyright © 2012 Everest Group, Inc. EGR-2012-3-A-0509

AGOSTO, 2012

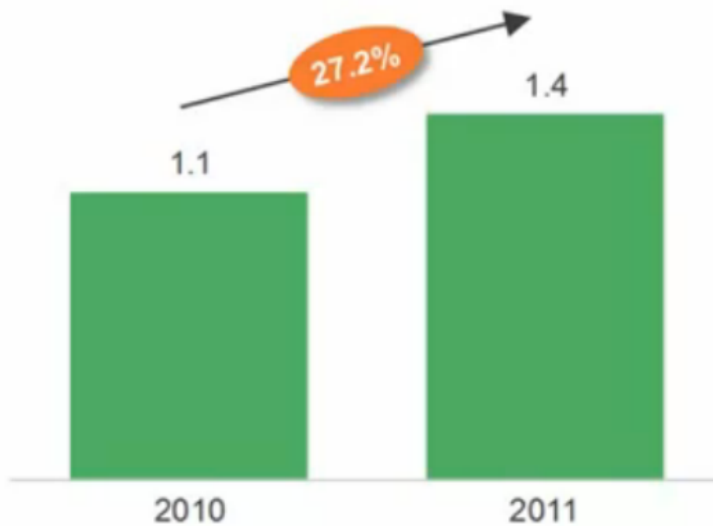
IBM adquiere KENEXA US\$1.3billion



DOBLE DÍGITO: 28%

The RPO market witnessed significant growth to reach US\$1.4 billion in annualized revenues in 2011

Growth of RPO market
Active ACV in US\$ billion



Some publicly announced deals that were signed in 2011

(Not exhaustive)

- Futurestep – AGL, Nestle Italy
- Kenexa – Eli Lilly
- PeopleScout – Roundy's Supermarket, Premier Research, and Sauer-Danfoss
- The RightThing – Chrysler Group

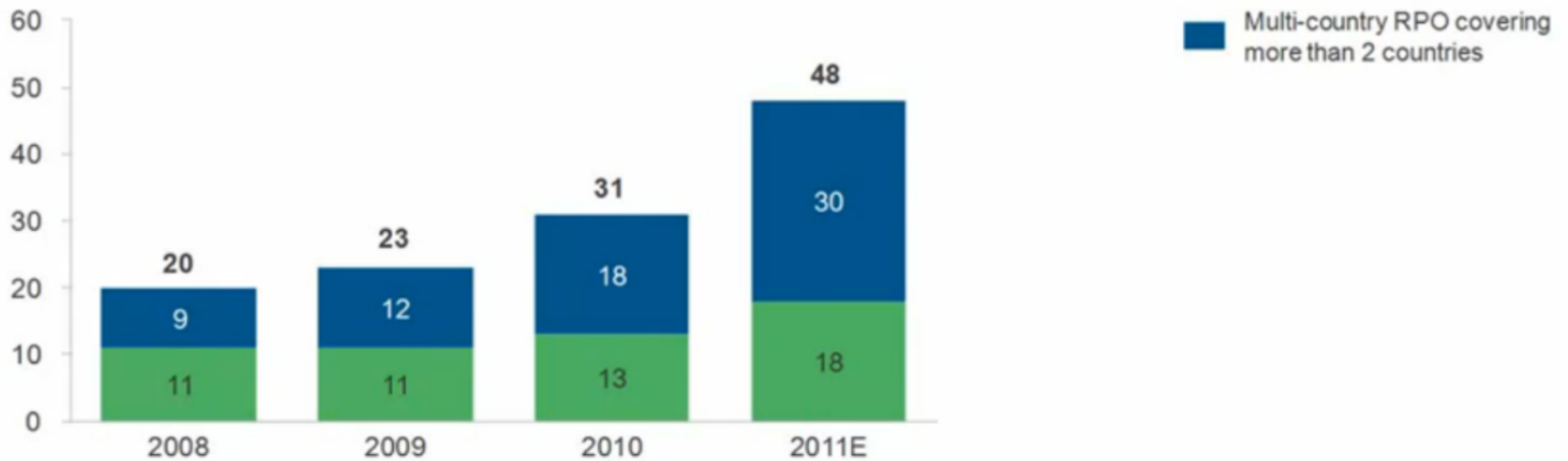
Sources: EverestGroup (2012)

GLOBAL

The high interest around multi-country RPO (MCRPO) is finally translating into actual deal activity

MCRPO growth

Number of new deals



Sample size: 331 RPO deals signed between 2008 and September 2011

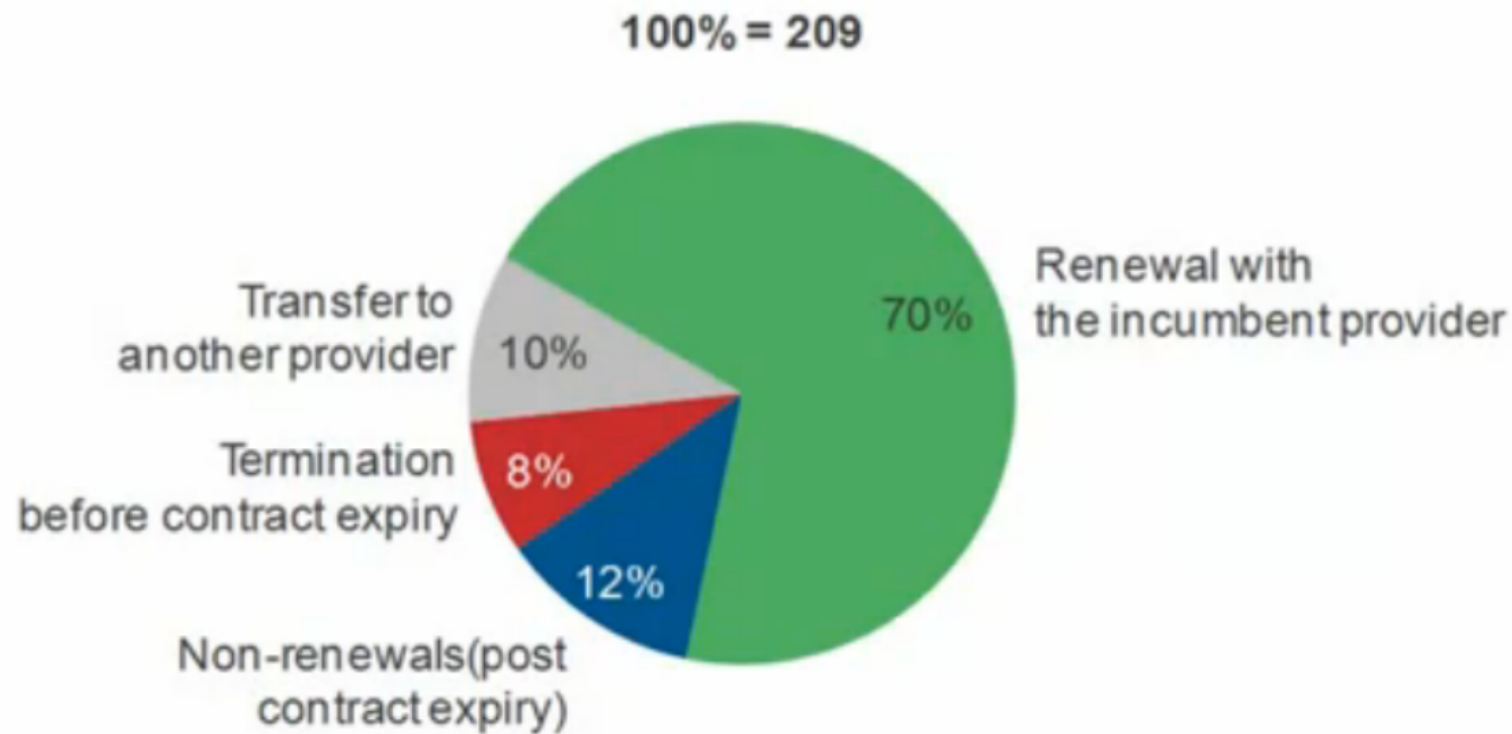
Note: Estimates used to calculate the number of deals for the entire year of 2011 as deal data available only till month of September

Source: Everest Group (2012)

RECURRENTTE

Deal renewal activity in 2010-2011

Number of deals



Sample size: 209 RPO deals that were up for renewal between 2010 and September 2011

Source: Everest Group (2012)

AGOSTO, 2012

IBM adquire KENEXA US\$1.3billion



IMPACTO EXPANSIÓN POR NUEVOS SERVICIOS



CATENON IN-PLANT

A new way to experience



PROYECTOS “LLAVE EN MANO”

**SERVICIOS DE CONTRACTING / STAFFING/HR LOGISTICS:
CONTRATACIÓN, PUESTA A DISPOSICIÓN, PAYROLL, ACCOMODATION, INSURANCE,
COMPANY CAR...**

catenon®

The smart global search

ONE PLANET · ONE OFFICE



Catenon, primera salida al Mercado de Valores de 2011 en España



INSEAD e IESE, en su iniciativa "Acelerador de Empresas", eligen a Catenon una de las 8 empresas en crecimiento más interesantes en Europa.



Certificado de calidad ISO 9001:2008

