

Technology One Limited (ASX: TNE)

Investor Day – Announces TAM of \$13.5B and \$1B+ ARR by FY30

BRISBANE, 30 July 2024 – Attached is a copy of the slides that will be presented at TNE's Investor Day briefing being held today.

- Ends -

Authorised for release by the CEO/MD and Chairman.

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About TechnologyOne

TechnologyOne (ASX: TNE) is Australia's largest enterprise software company and one of Australia's top 100 ASX-listed companies, with locations across six countries. We provide a global SaaS ERP solution that transforms business and makes life simple for our customers. Our deeply integrated enterprise SaaS solution is available on any device, anywhere and any time and is incredibly easy to use. Over 1,300 leading corporations, government agencies, local councils and universities are powered by our software.

For more than 36 years, we have been providing our customers enterprise software that evolves and adapts to new and emerging technologies, allowing them to focus on their business and not technology.

For further information, please visit: [TechnologyOneCorp.com](https://www.technologyonecorp.com)

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Disclosure Statement

TechnologyOne Ltd Full Year Presentation – 30 July 2024

TechnologyOne Ltd (ASX: TNE) today conducted a series of presentations relating to its 2024 Half Year results.

These slides have been lodged with the ASX and are also available on the company's website: www.TechnologyOneCorp.com

The information contained in this presentation is of a general nature and has been prepared by TechnologyOne in good faith. TechnologyOne makes no representation or warranty, either express or implied, in relation to the accuracy or completeness of the information. This presentation may also contain certain 'forward looking statements' which may include indications of, and guidance on financial position, strategies, management objectives and performance. Such forward looking statements are based on current expectations and beliefs and are not guarantees of future performance, and involve known and unknown risks, uncertainties and other factors, many of which are outside the control of TechnologyOne. TechnologyOne advises that no assurance can be provided that actual outcomes will not differ materially from those expressed in this presentation.

This presentation includes the following measures used by the Directors and management in assessing the on-going performance and position of TechnologyOne: EBITDAR, EBITDA, EBIT, ARR, Churn, Cash Flow Generation. These measures are non-IFRS under Regulatory Guide 230 (Disclosing non-IFRS financial information) published by the Australian Securities and Investment Commission and have not been audited or reviewed.

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C. Bennett
Cale

CFO



S. Macdonald
Stuart

COO



C. Potoczki
Chandan

CTO



D. Cope
David

EVP CX



B. Douglas
Brock

EVP



L. Hanna
Leo

EVP UK

Agenda

9:30 - 10:00	Registration & Office Tours
10:00 - 10:30	What makes TechnologyOne unique
10:30 - 11:00	Light Refreshments Product Booths
11:00 - 11:30	What problem are we solving for our Customers
11:30 - 12:00	Demo How we solve problems for our Customers
12:00 - 12:30	Our total addressable market & SaaS+ intro
12:30 - 1:00	Deep dive into SaaS+ financials
1:00 - 1:45	Lunch & Product Booths
1:45 - 2:00	Summary
2:00 - 2:30	Q&A



Agenda

What makes
TechnologyOne unique

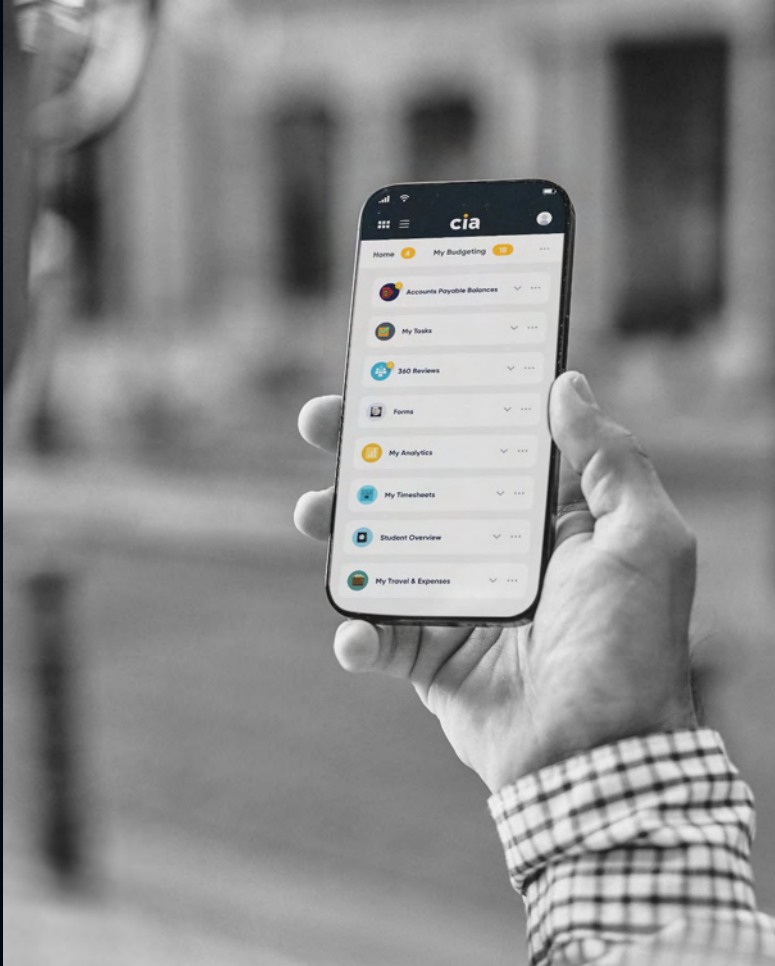
What makes us special
Our platforms for growth

Our Vision

Making life simple for our community

We build and deliver truly great products and services that transform business and make life simple for our customers.






Purpose

**Our passion is
to solve the
complex.**


Mission

**Better our
community, from its
citizens to students,
by leveraging our
team's innovation,
drive and
determination.**

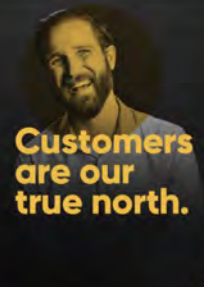




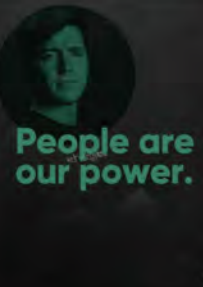

Values.




We're stronger as one.



Customers are our true north.



People are our power.




Make the impossible possible.





Simplicity is our compass.





Compelling Customer experience.





Listen.
The customer's perception is my reality.





Own it.
When I see a problem, I solve it. I play my part.




Advocate.
On the customer's behalf with courage and conviction.



Take Action.
It's what I do that matters.



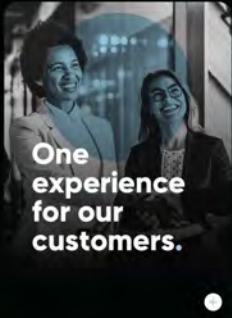
Deliver.
A compelling experience with every interaction.



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ERP software



One experience for our customers.



Market Focus & Commitment.



Evolution not revolution.



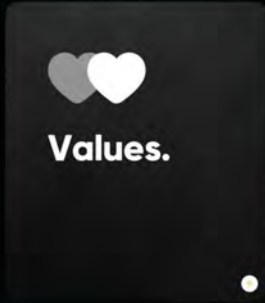
The Power of One.




Tech is the answer.



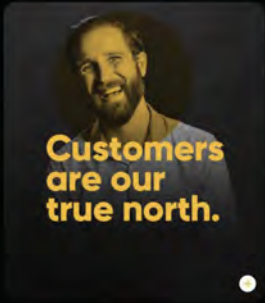
We dream big and deliver.



Values.



We're stronger as one.



Customers are our true north.



People are our power.



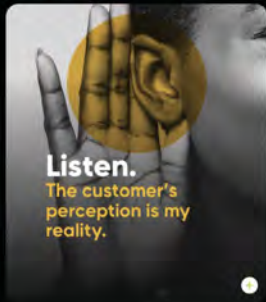
Make the impossible possible.



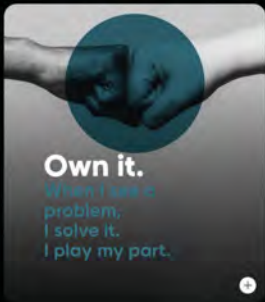
Simplicity is our compass.



Compelling Customer experience.



Listen.
The customer's perception is my reality.




Own it.
When I see a problem, I solve it. I play my part.



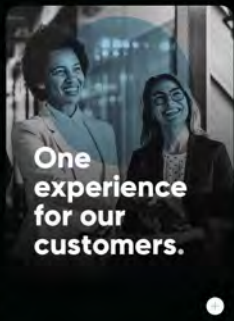
Advocate.
On the customer's behalf with courage and conviction.

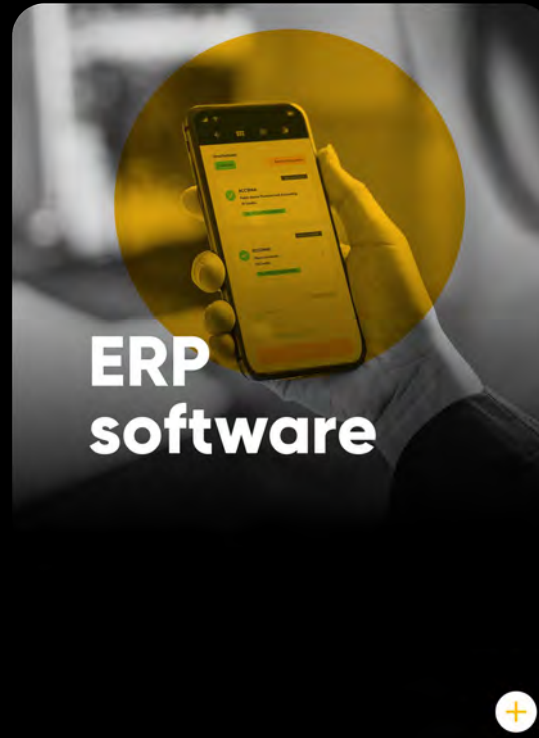


Take Action.
It's what I do that matters.



Deliver.
A compelling experience with every interaction.








Total ERP Solution.

Power of a single integrated solution

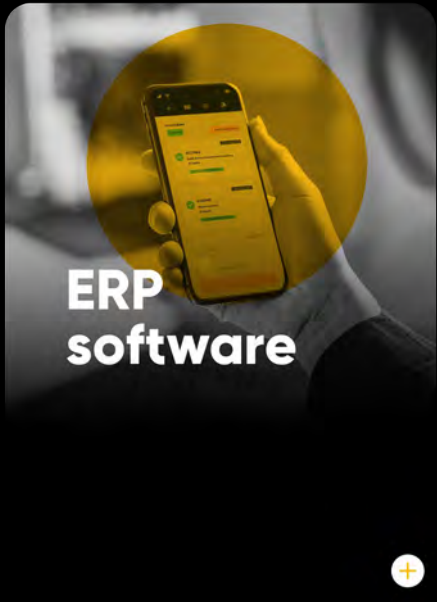
 Business Analytics	 Corporate Performance Management	 DxP Local Government	 Enterprise Asset Management	 Enterprise Budgeting	 Enterprise Cash Receipting	 Enterprise Content Management	 Financials
 Human Resources and Payroll	 Performance planning	 Property and Rating	 Spatial	 Strategic Asset Management	 Student Management	 Supply Chain Management	 Timetabling & Scheduling



**ERP
software**



**One
experience
for our
customers.**





Deepest functionality for the markets we serve.



Local
Government



Education



Government



Asset and
Project
Intensive
industries



Health and
Community
Services



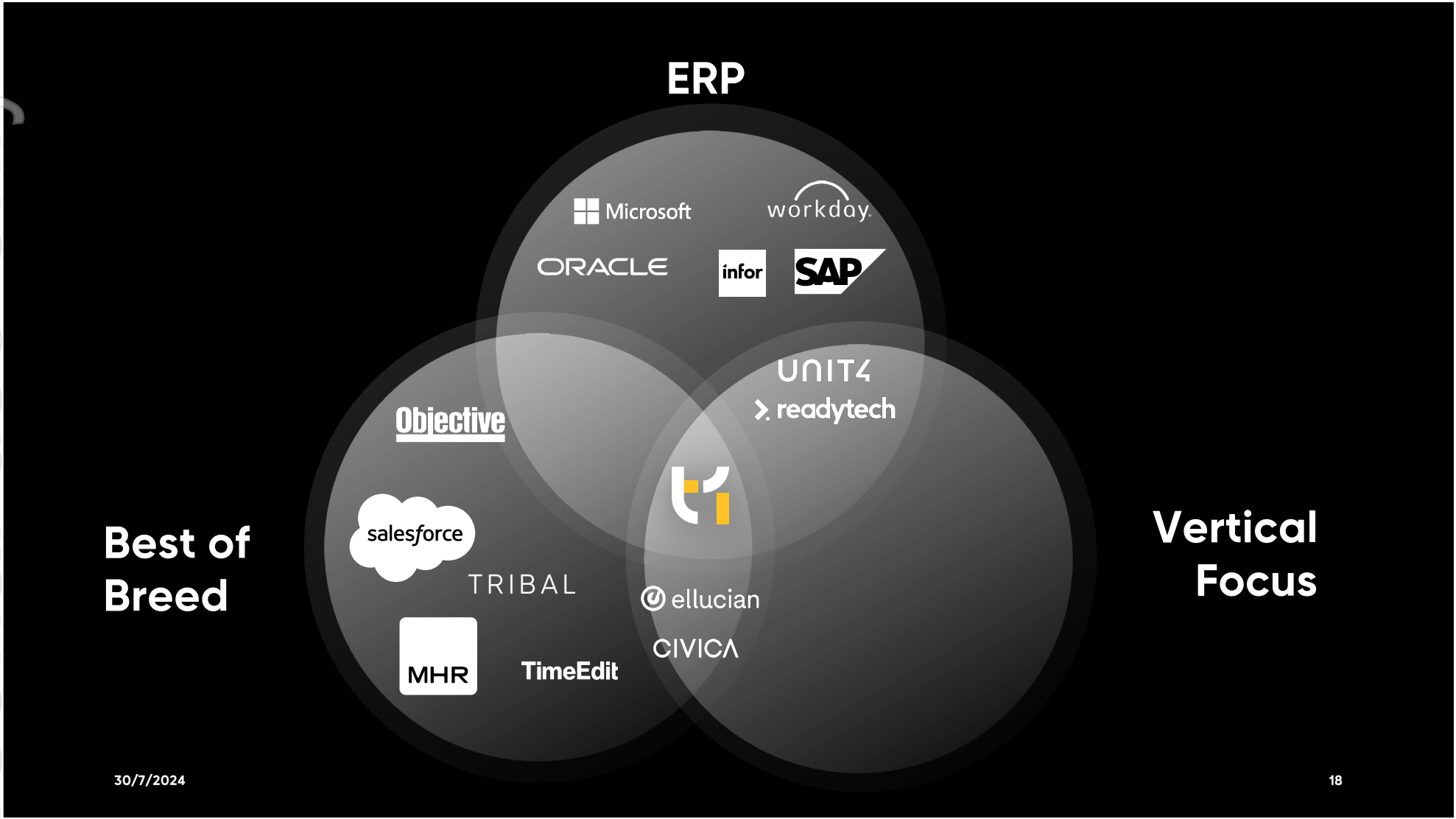
Financial
Services and
Corporates

We provide proven practice preconfigured solutions to reduce time, cost & risk



**We will narrow down as we
expand geographically.**

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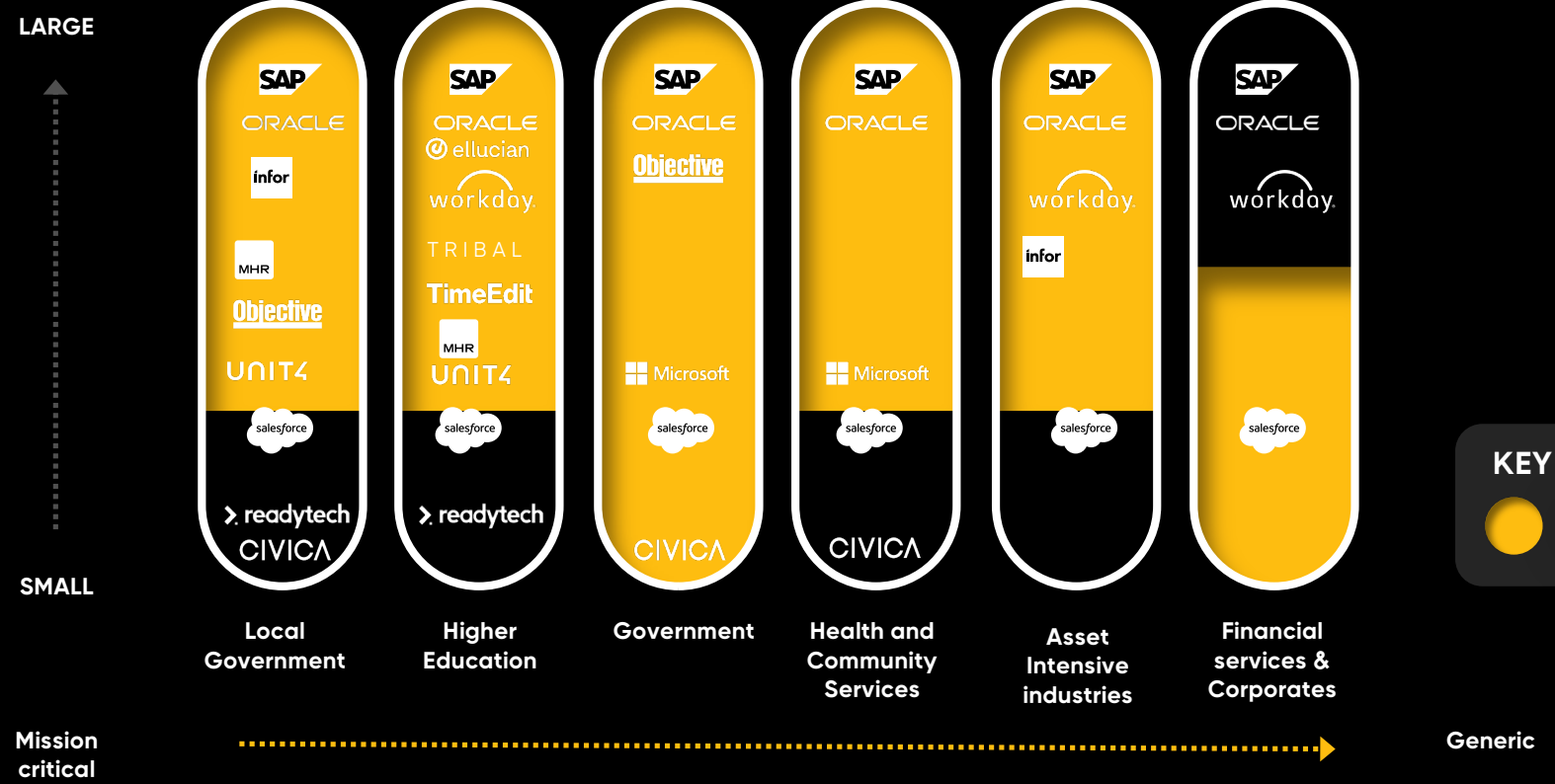


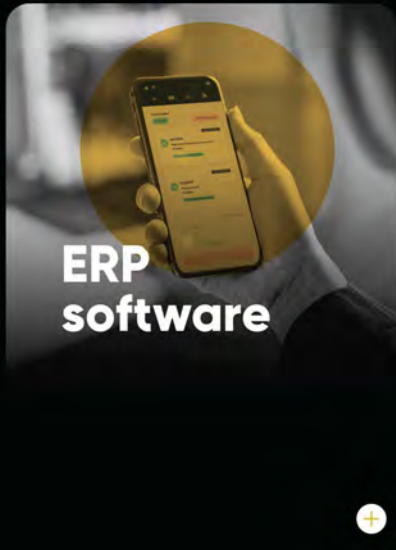
30/7/2024

18

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Market position





ERP software

+



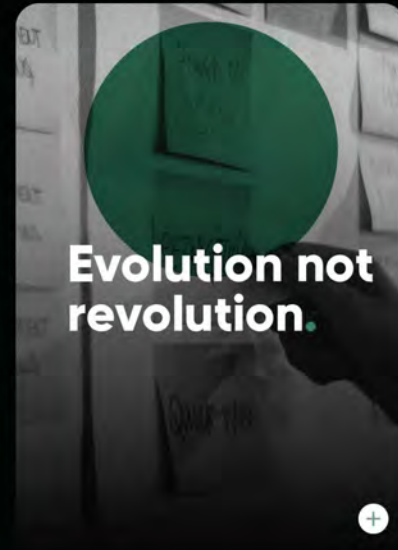
One experience for our customers.

+



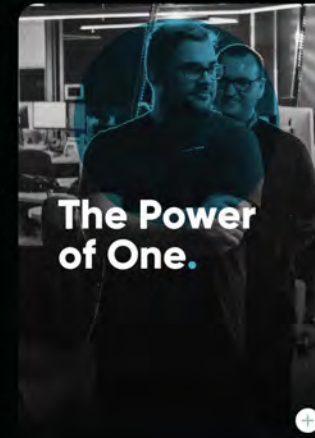
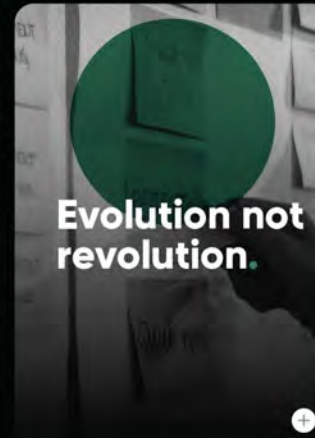
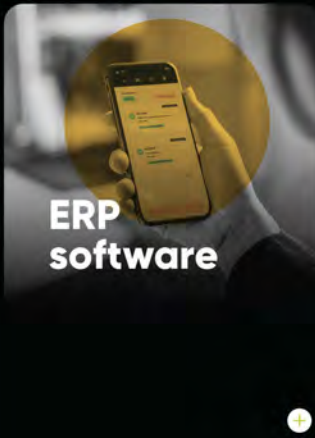
Market Focus & Commitment.

+



Evolution not revolution.

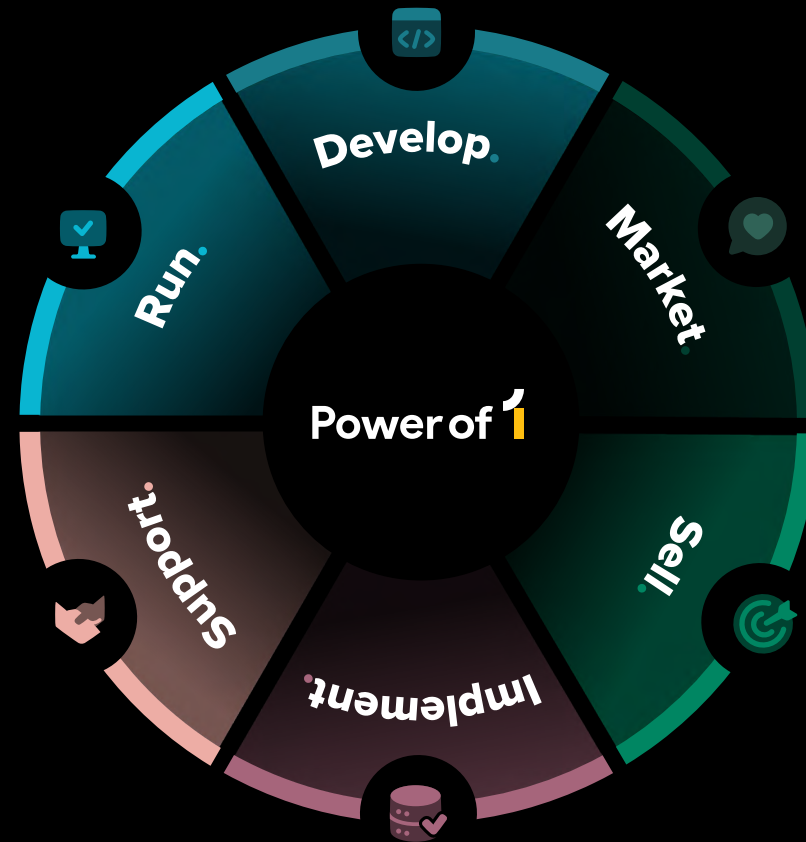
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The Power of One.

One vision.
One vendor.
One code-line.
One experience.

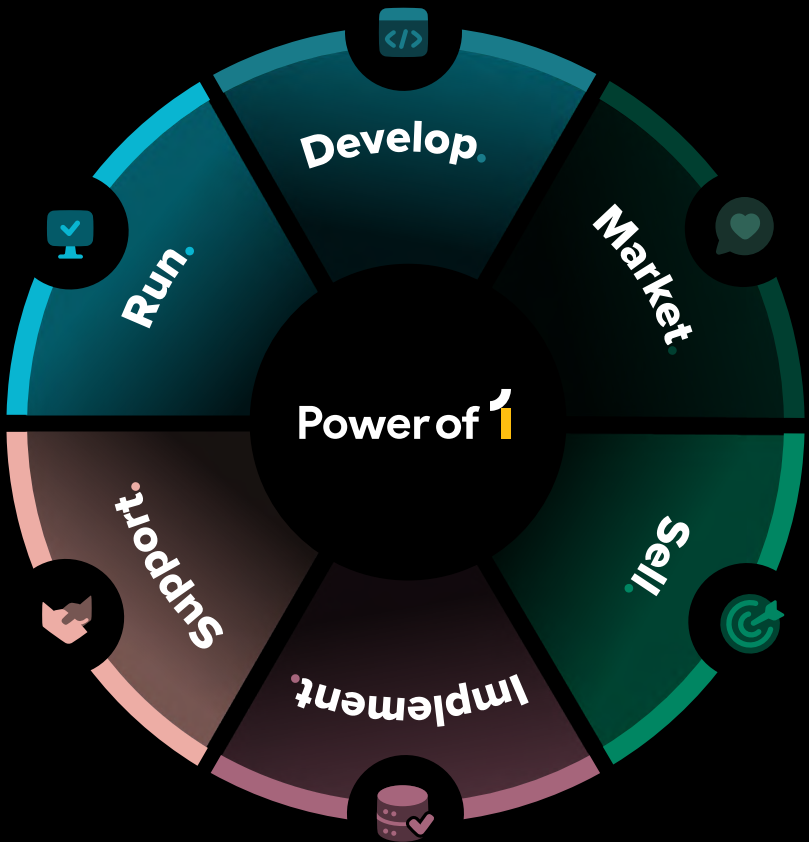
We take complete responsibility
We do not use Implementation Partners or Re-Sellers



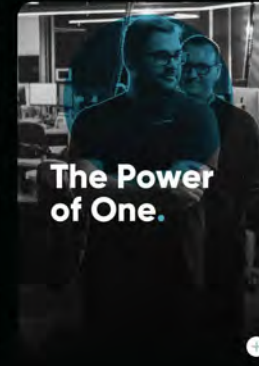
The Power of One.

IP Engine.
Own customer relationship.
100% accountability.
99%+ retention.

We take complete responsibility
We do not use Implementation Partners or Re-Sellers



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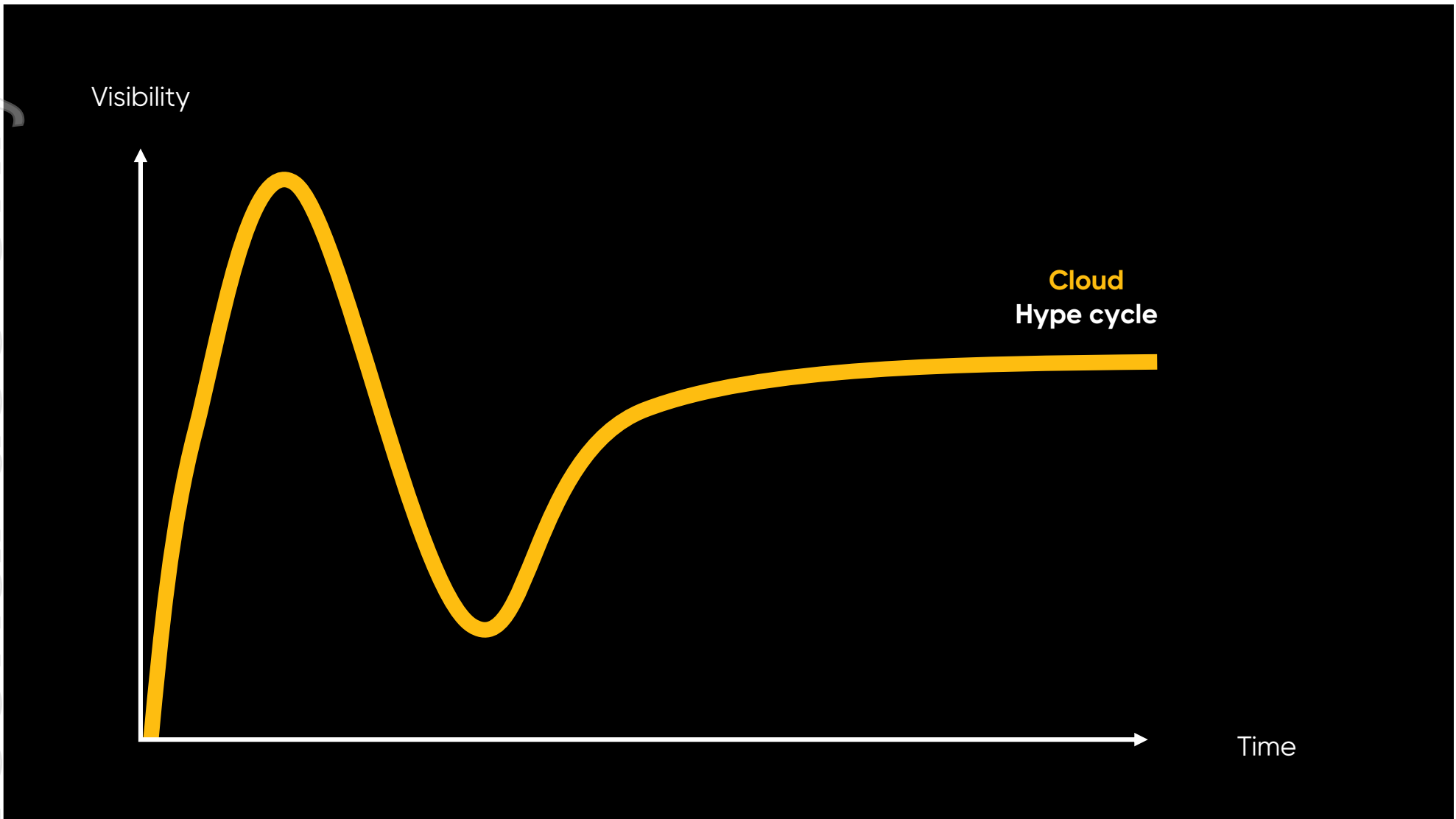


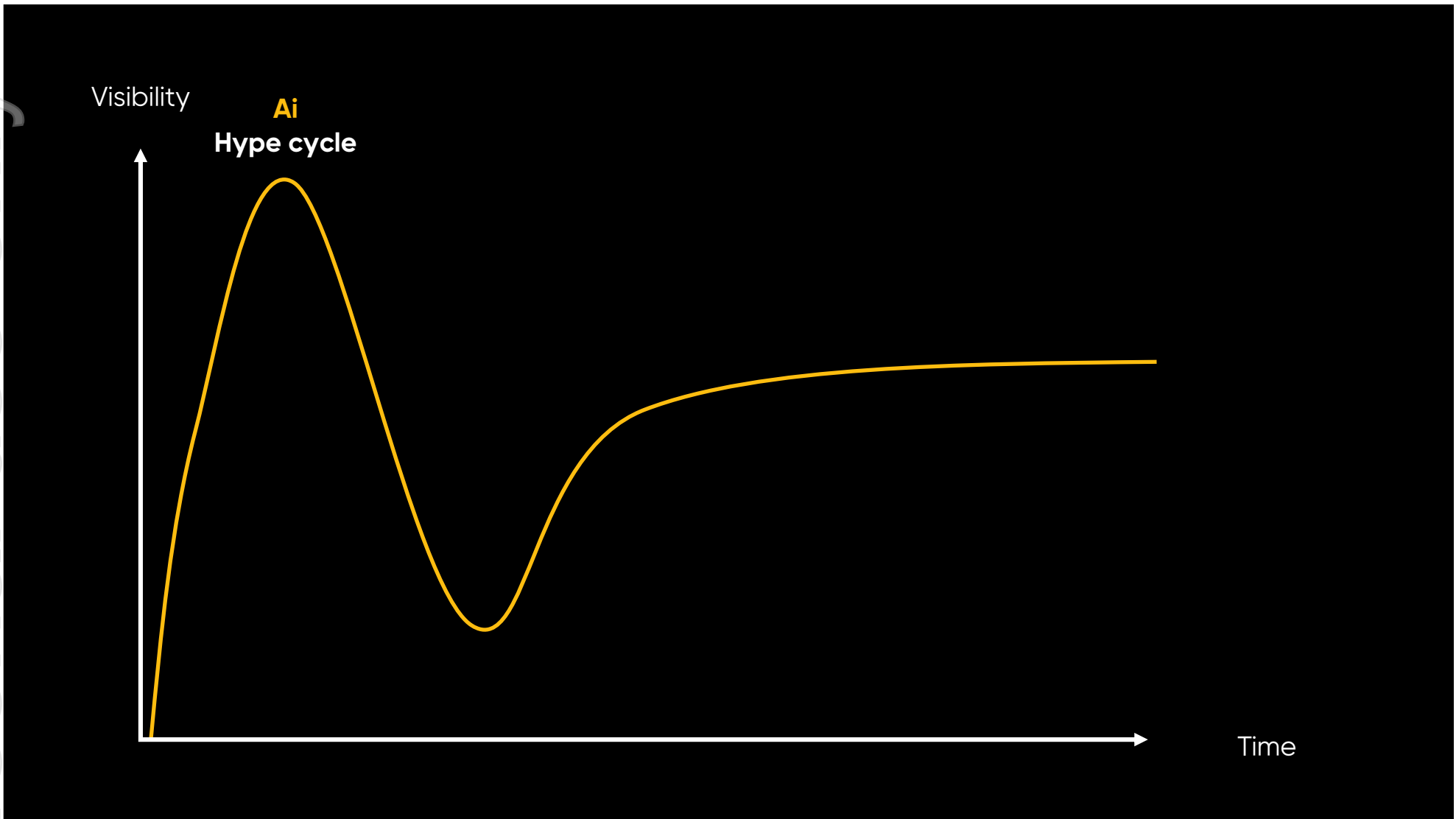


**Silicon Valley?
Try Fortitude Valley.**

**We are an innovation driven company
Invest 20+% of Revenue**

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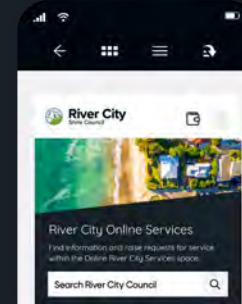
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Security

Future

24^a

24^b



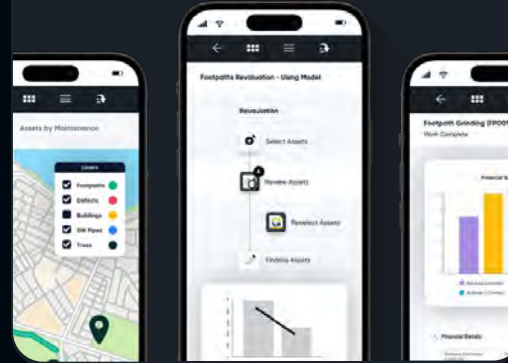
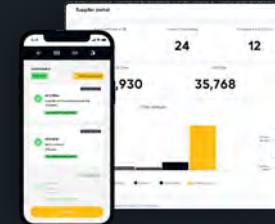
dip

App
builder

cia

"SaaS Plus, which offers a faster implementation, meaning the Council could reap the benefits at an accelerated pace compared to traditional time and material methodology."

Tech

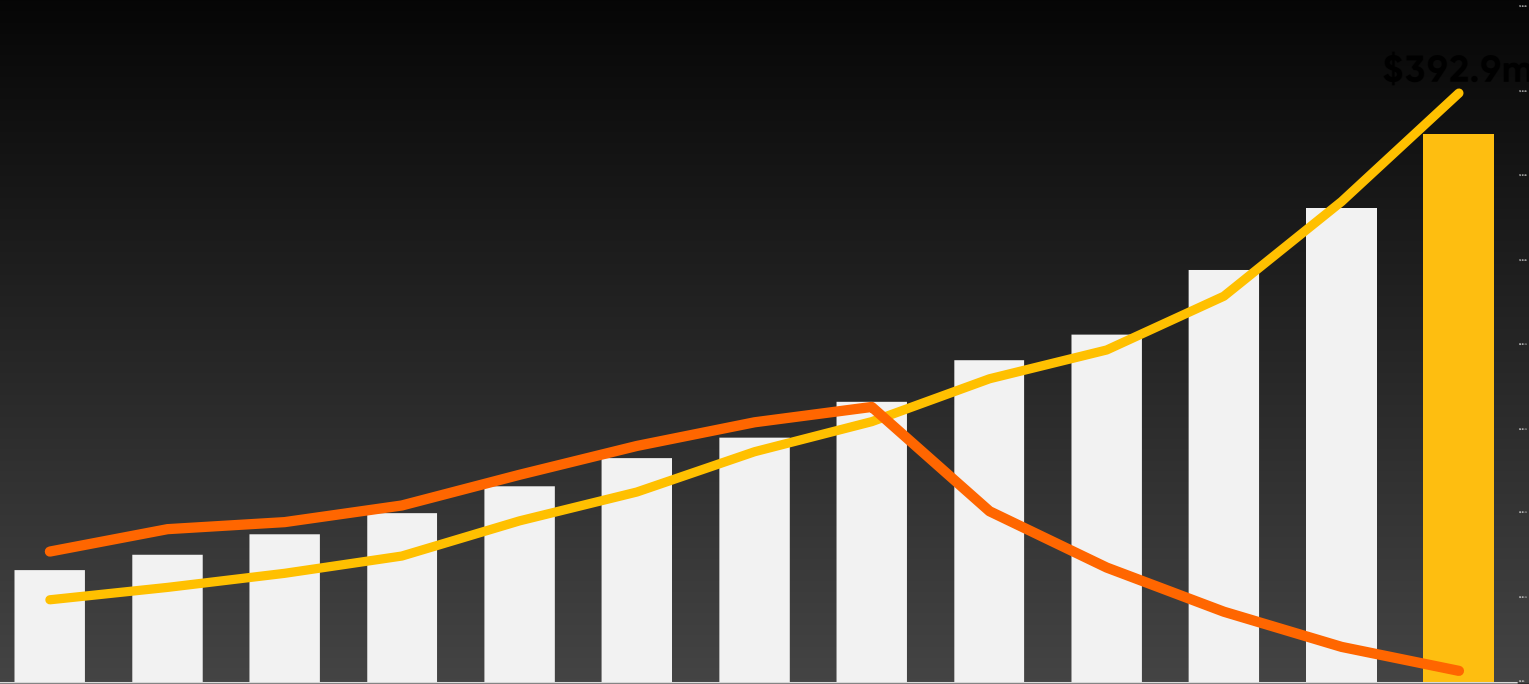


SaaS+

community

Transition to SaaS - Careful reduction of legacy licence fees

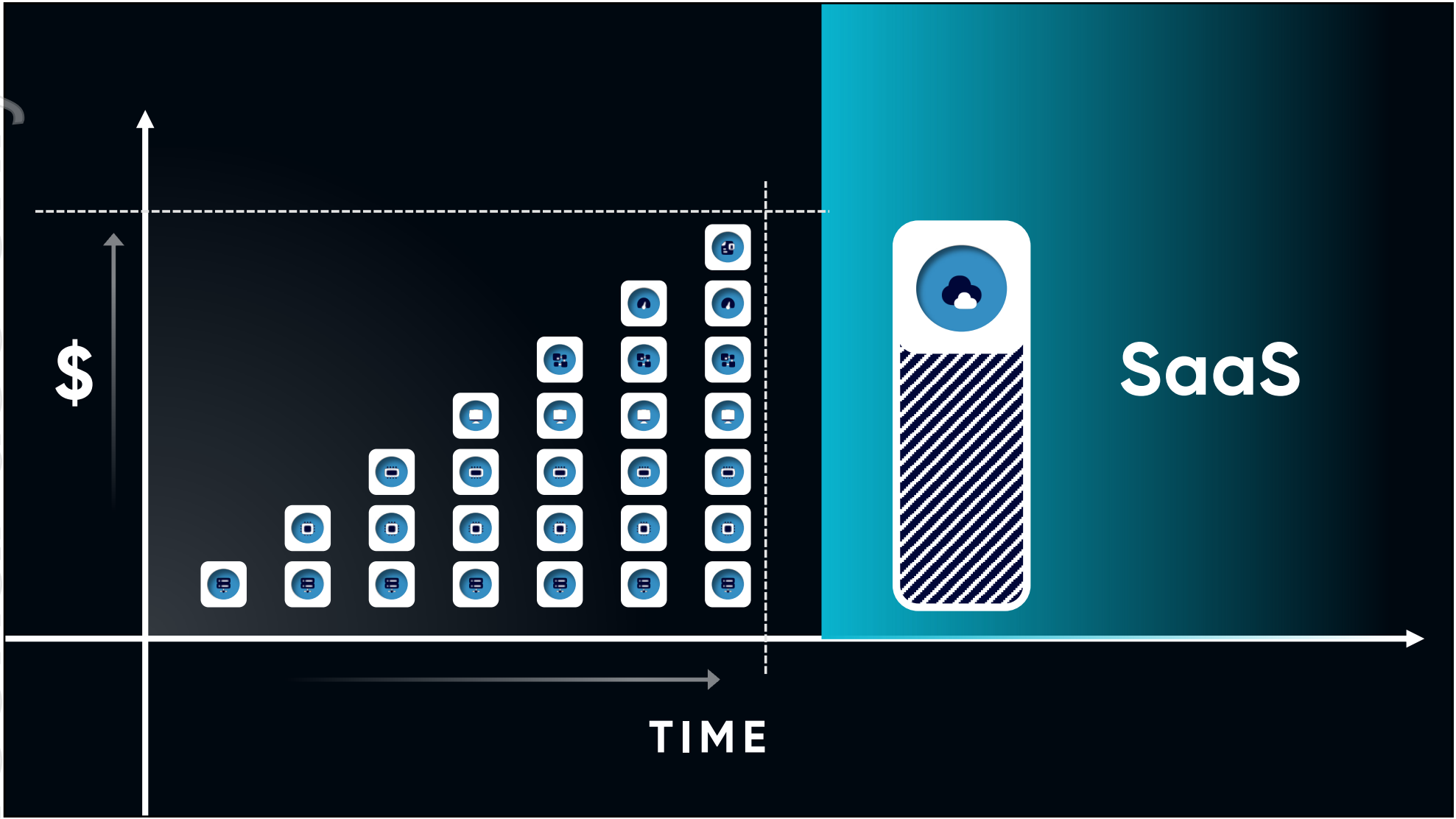
Total ARR & Legacy Licence Fee (\$m)

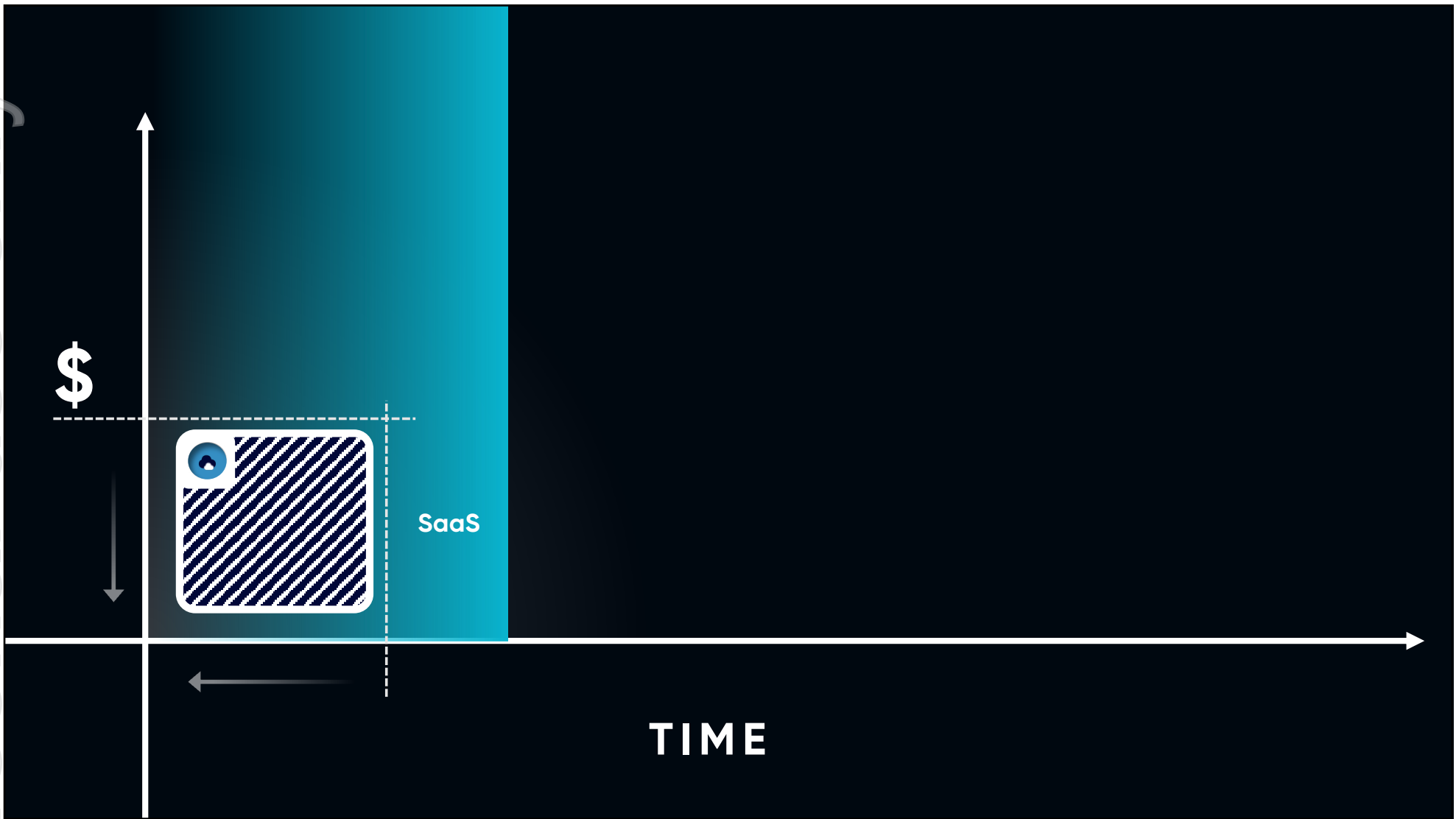


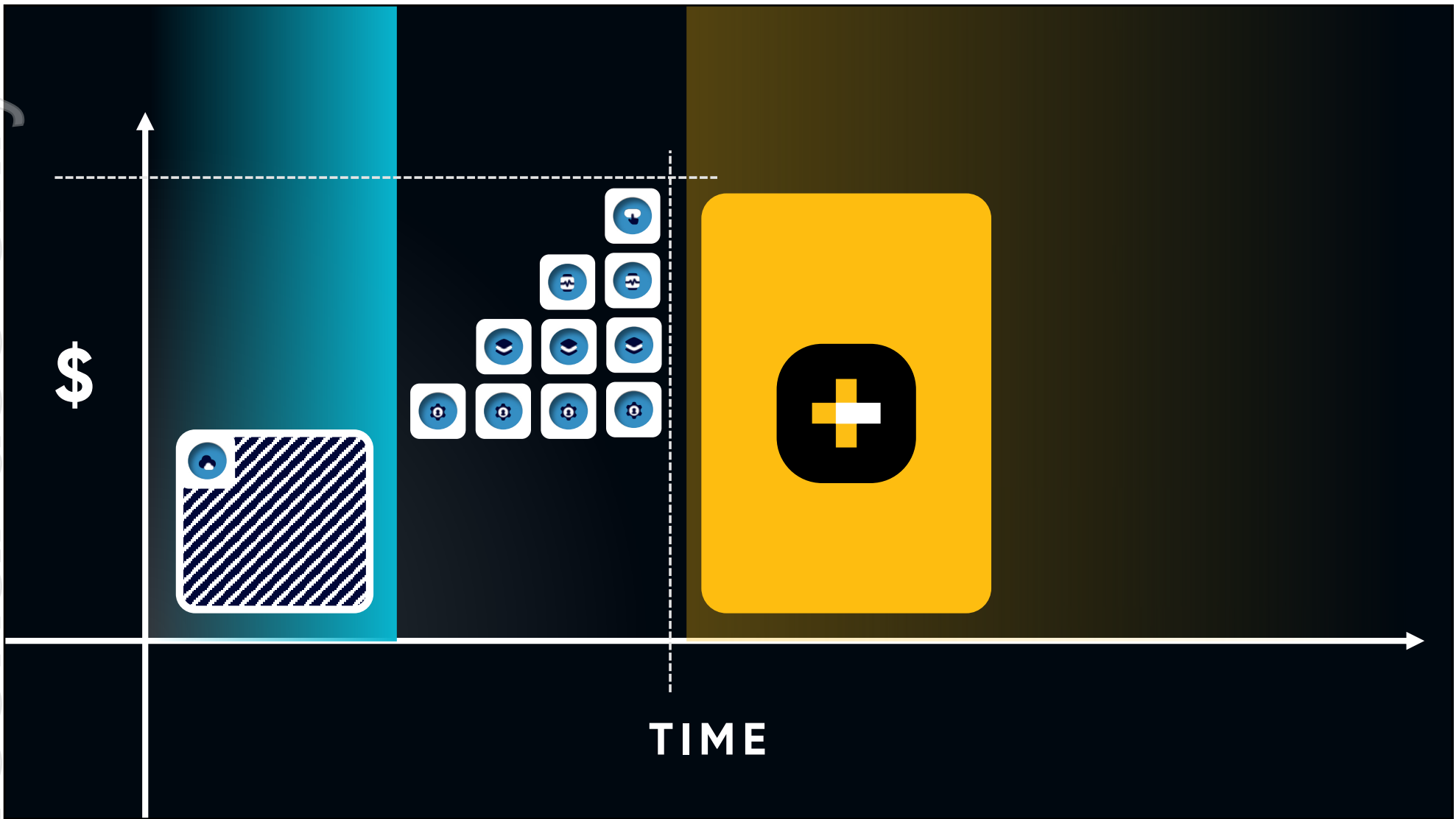
Net Profit Before Tax (\$m)

\$392.9m

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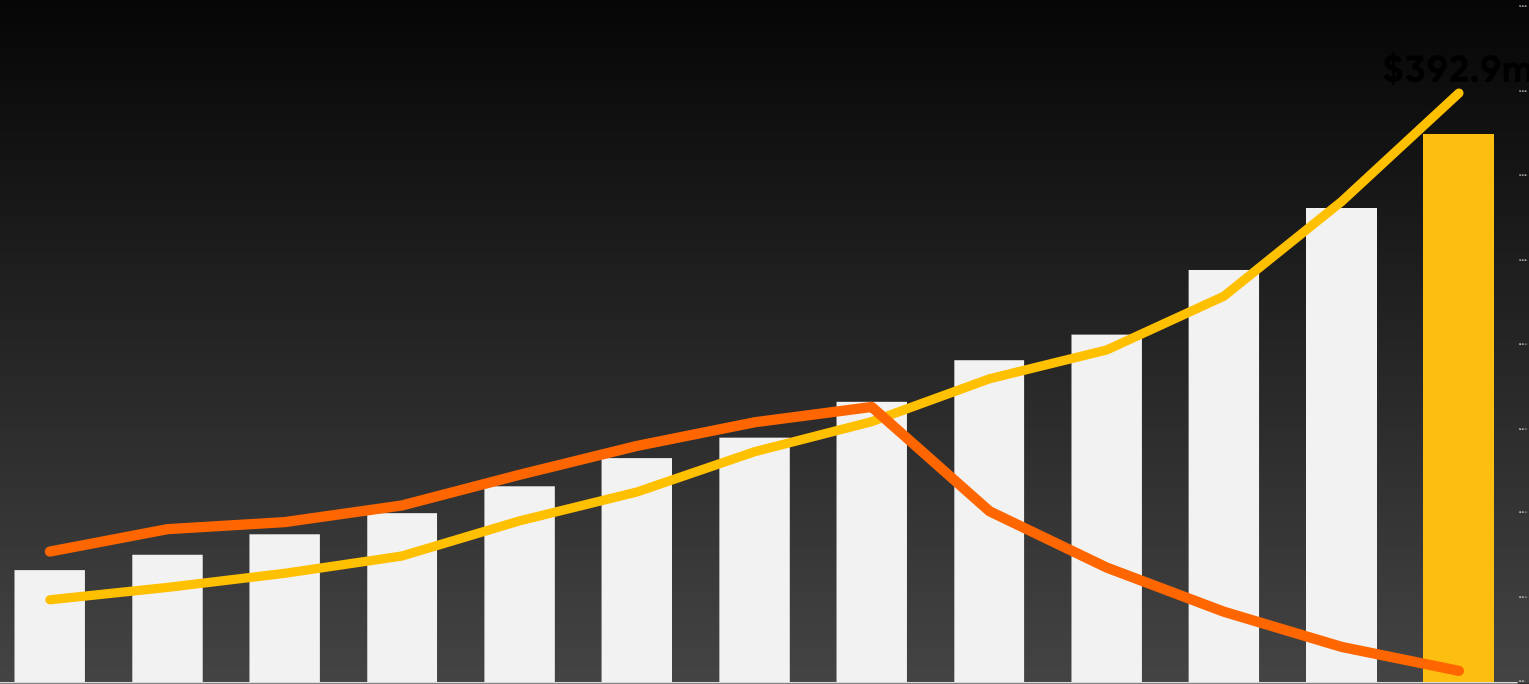






Transition to SaaS - Careful reduction of legacy licence fees

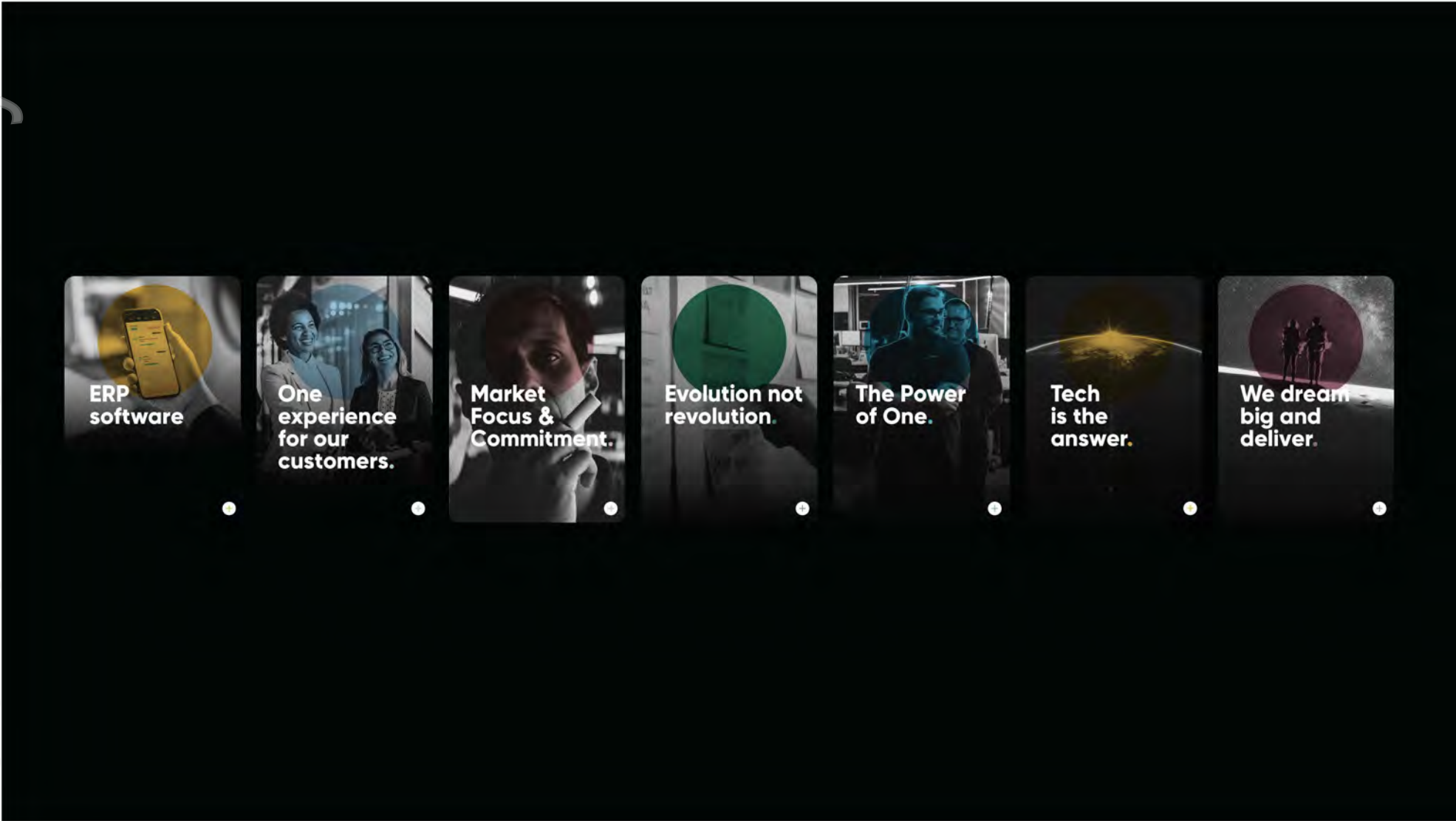
Total ARR & Legacy Licence Fee (\$m)



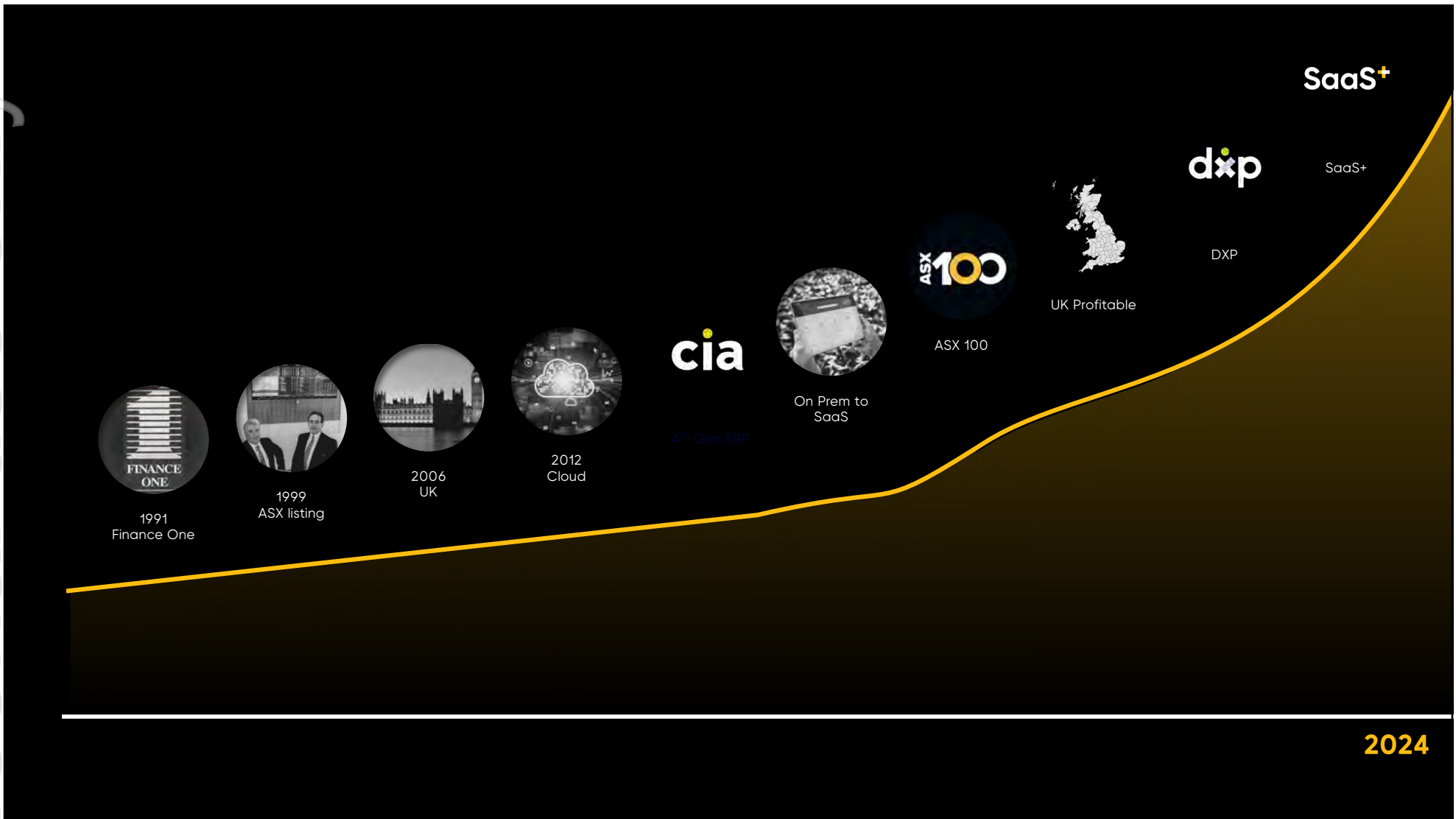
Net Profit Before Tax (\$m)

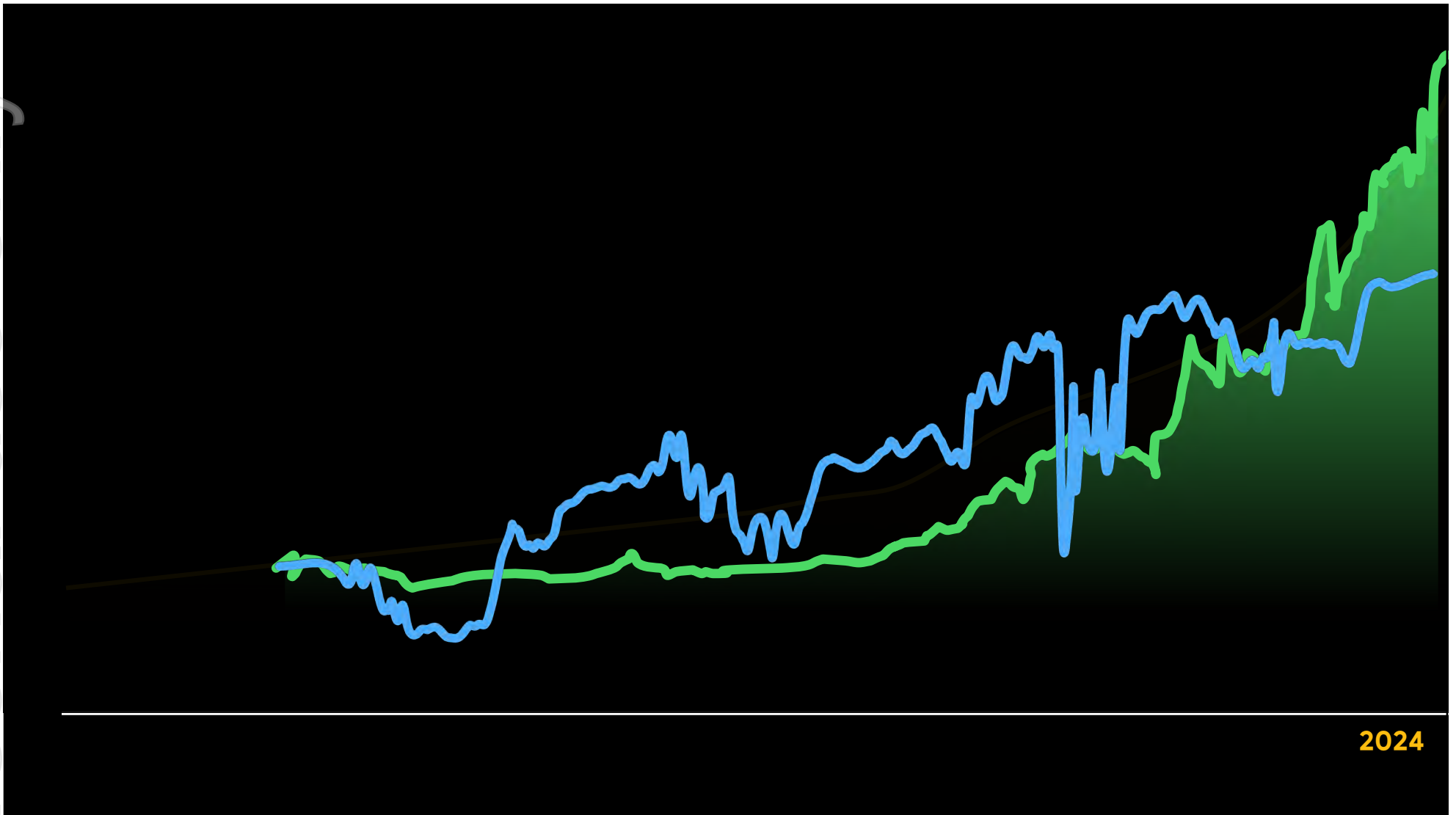
\$392.9m

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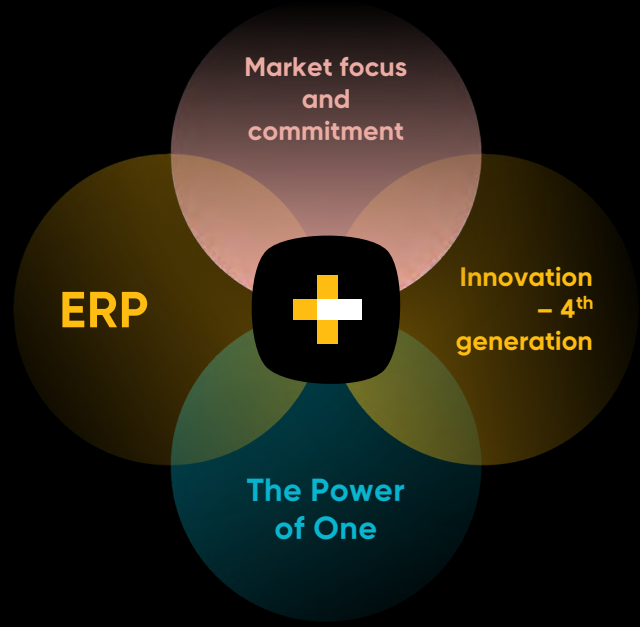




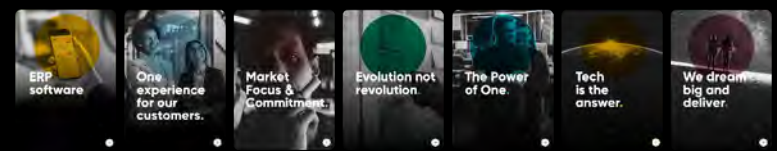
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1 technologyone



SaaS+





Agenda

What makes
TechnologyOne Unique

What makes us special
Our platforms for growth

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\$500m ARR by FY26



~~\$500m ARR by FY26~~
\$500m ARR by FY25

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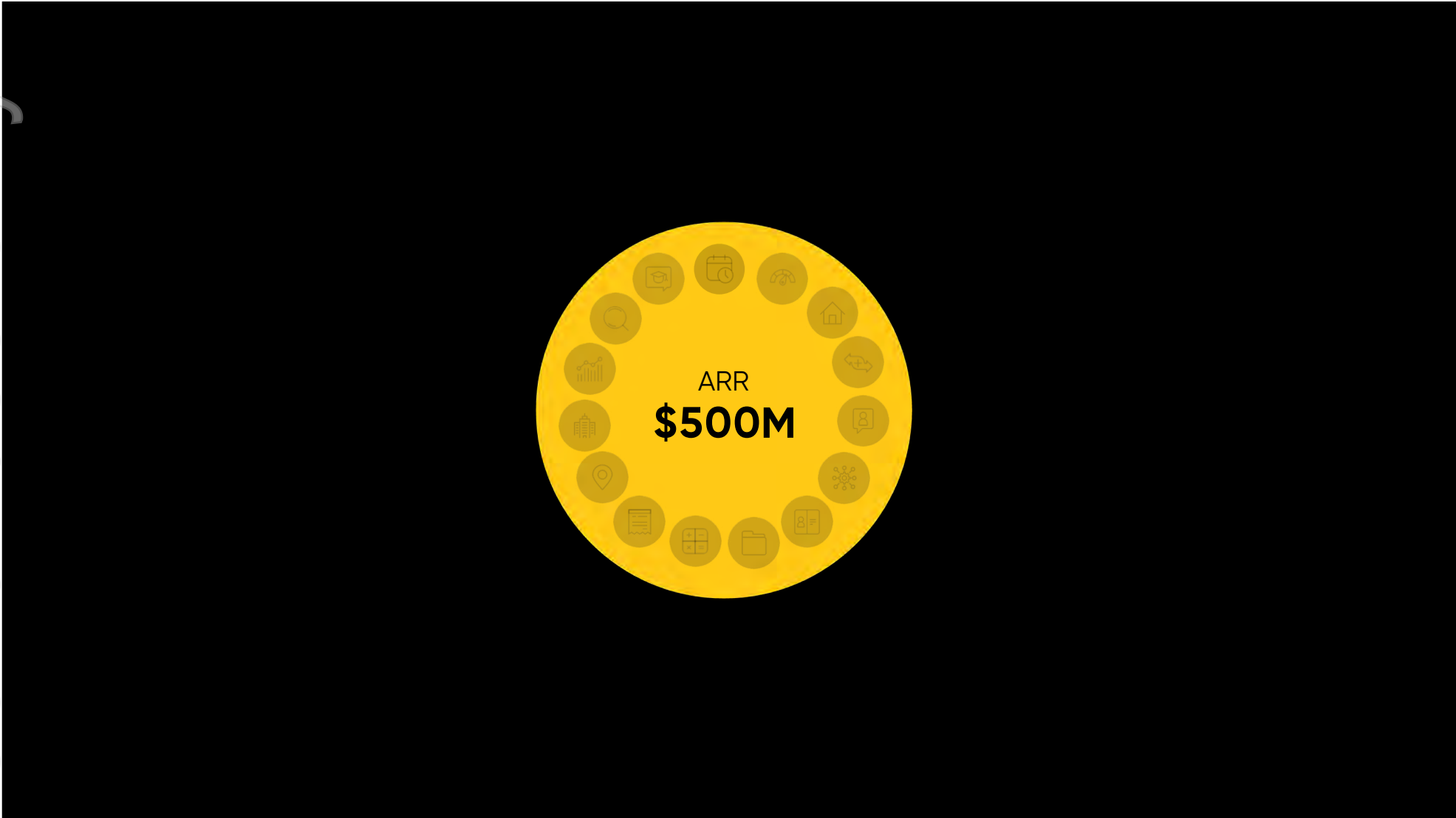
~~\$500m ARR by FY26~~
~~\$500m ARR by FY25~~

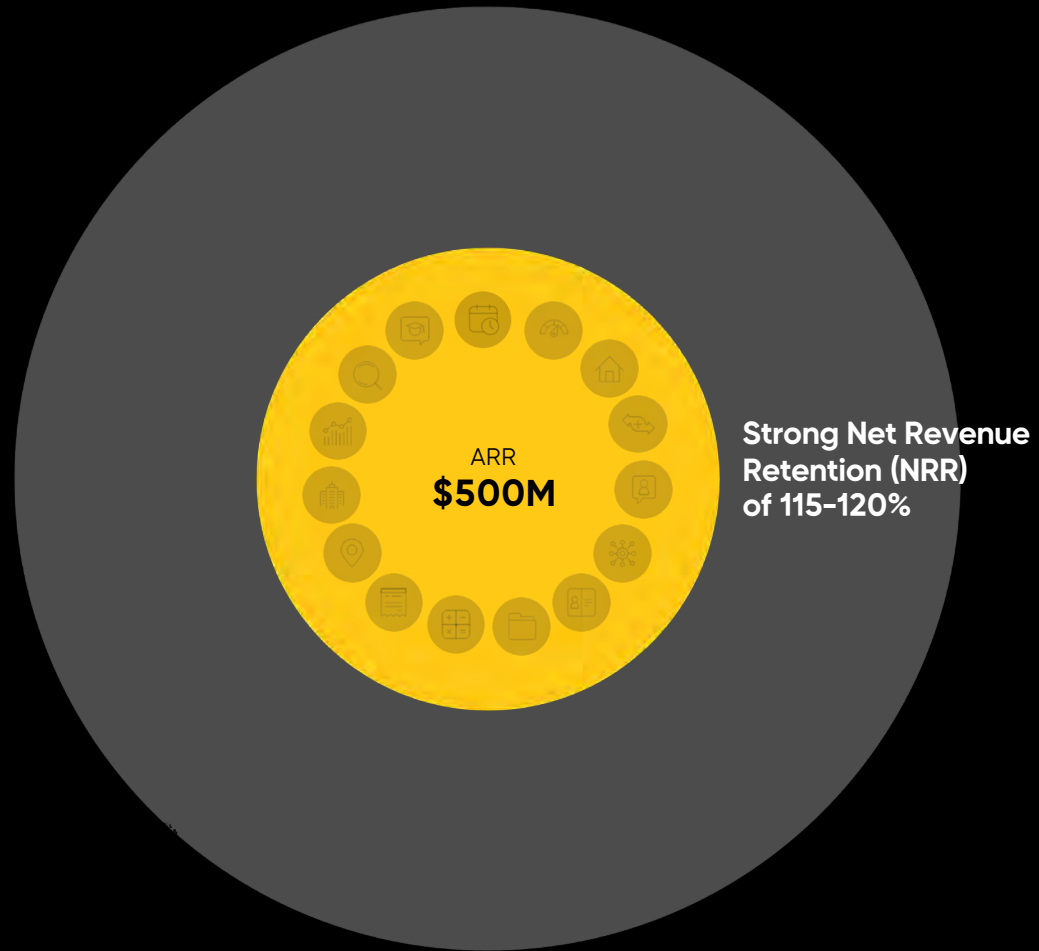


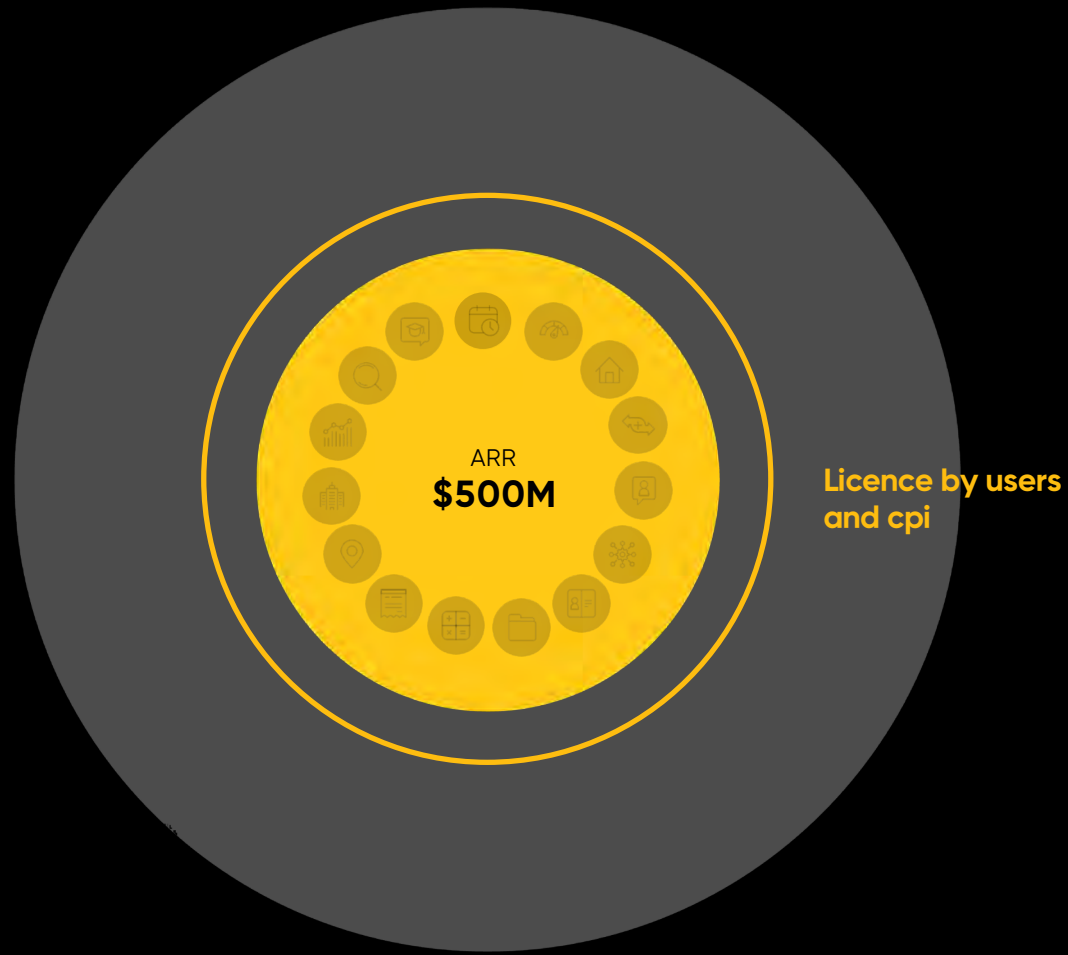
~~\$500m ARR by FY26~~

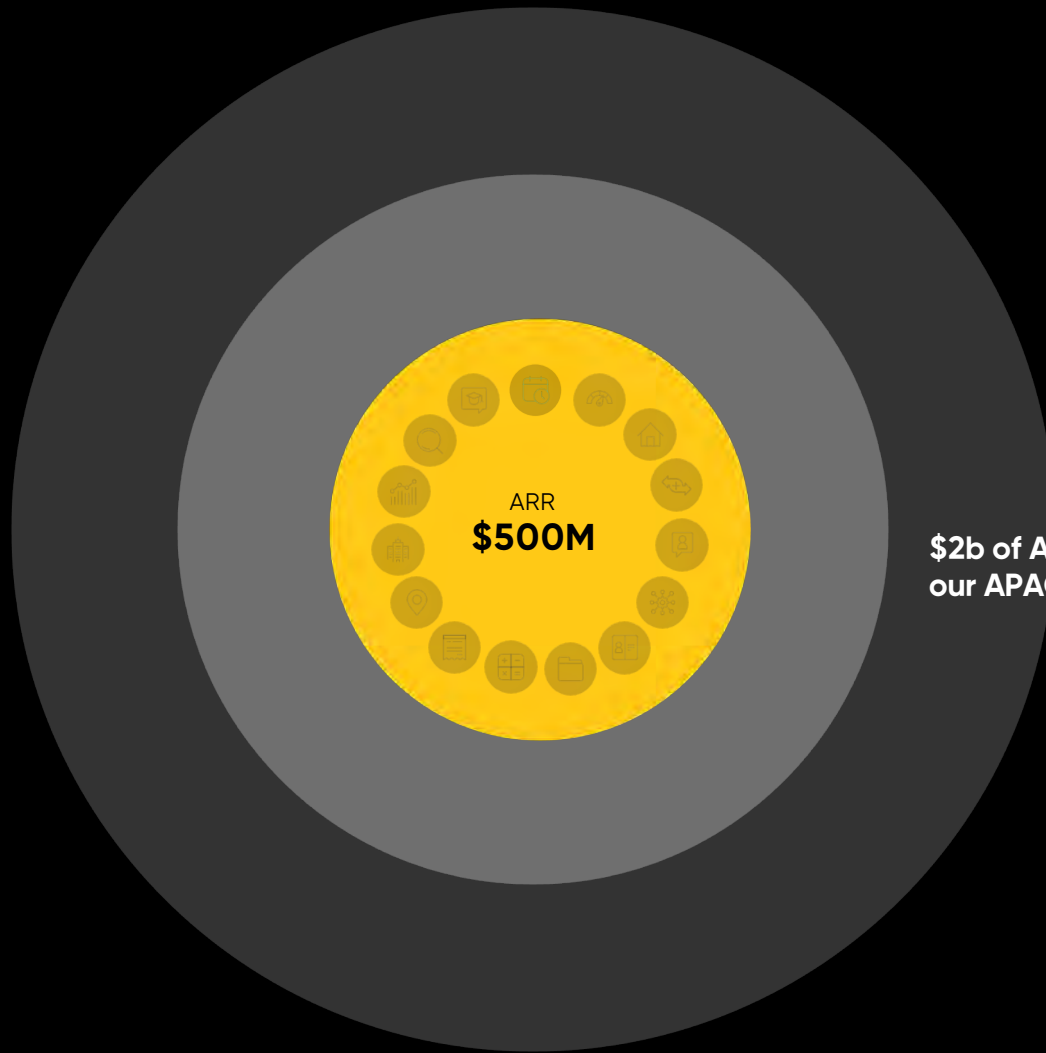
~~\$500m ARR by FY25~~

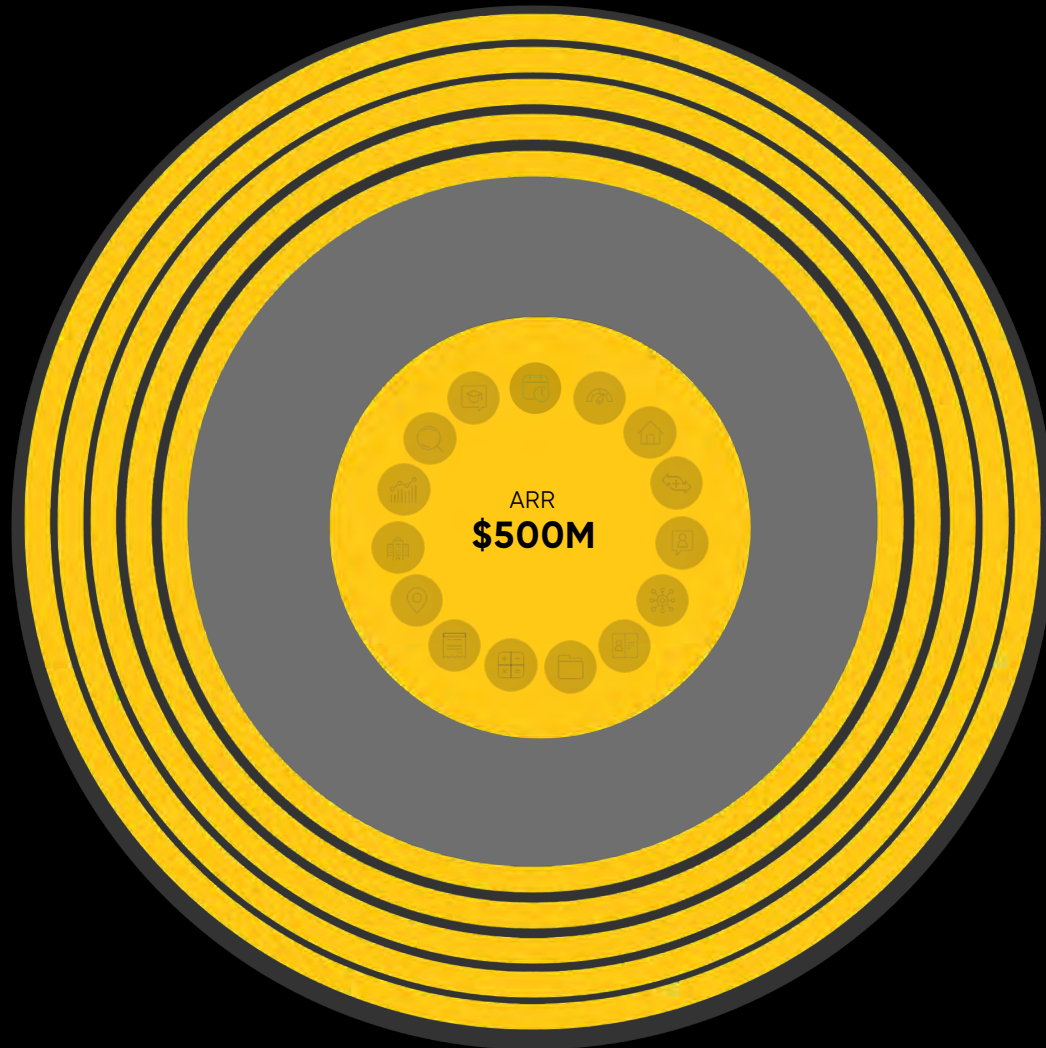
\$500m ARR by H1 FY25



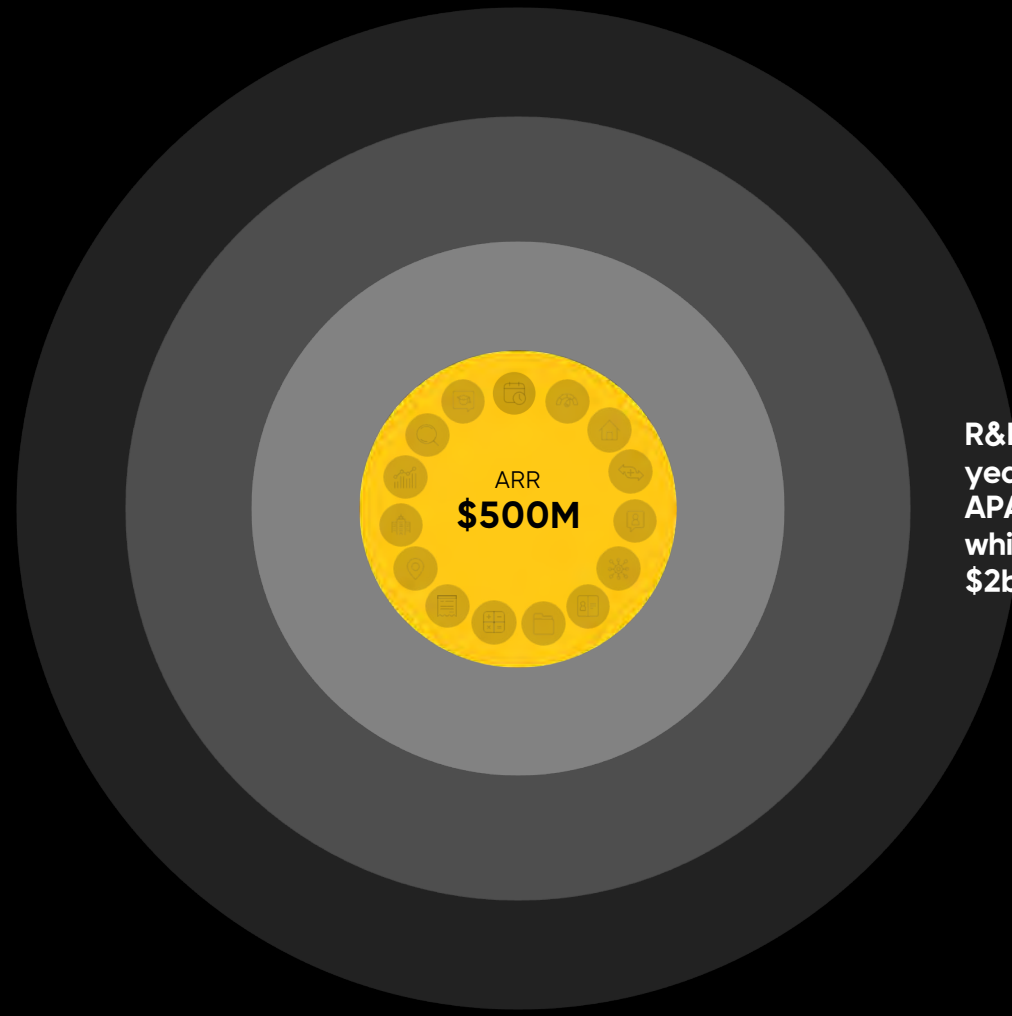




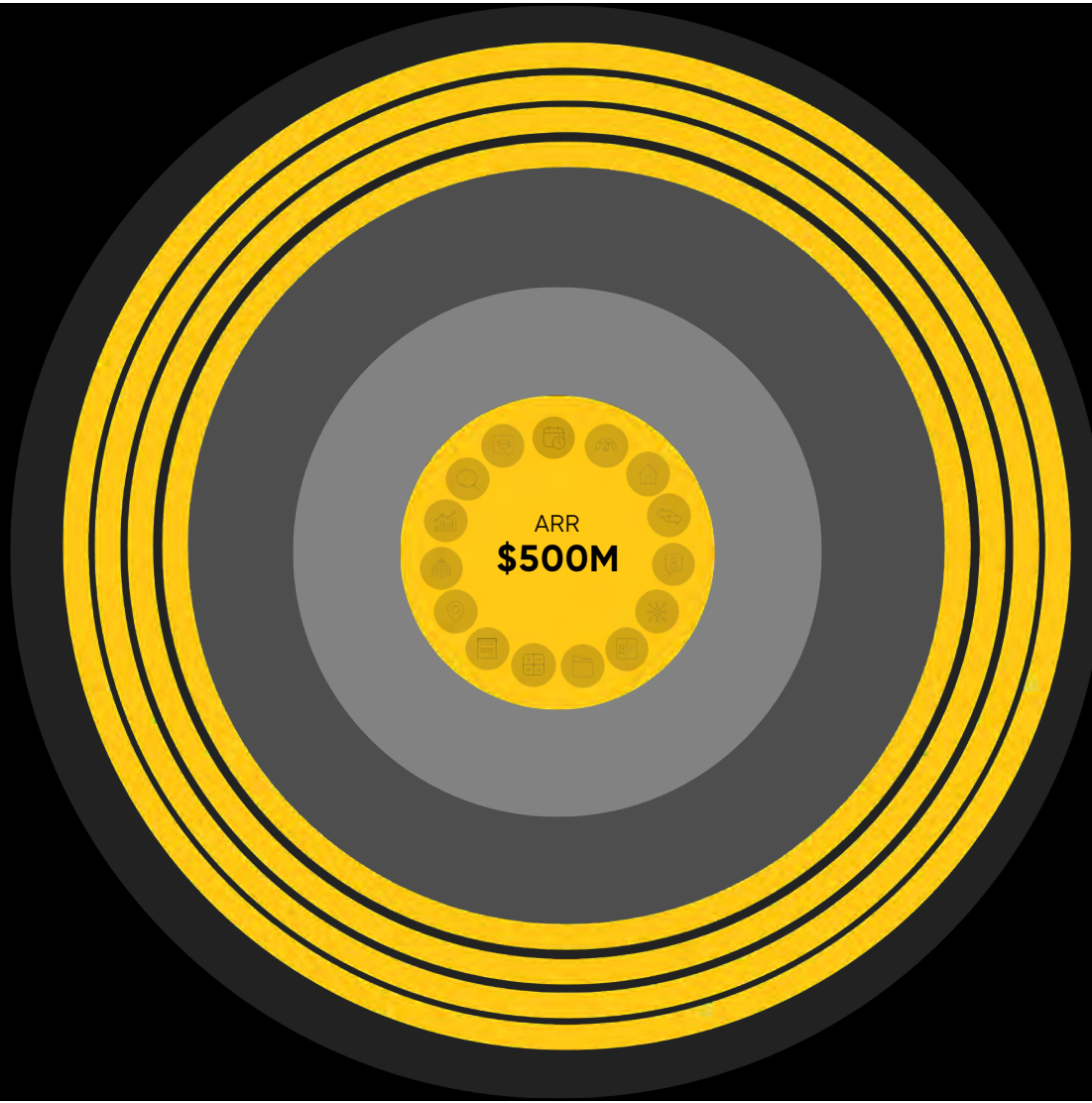




\$2b of ARR whitespace in our APAC customer base

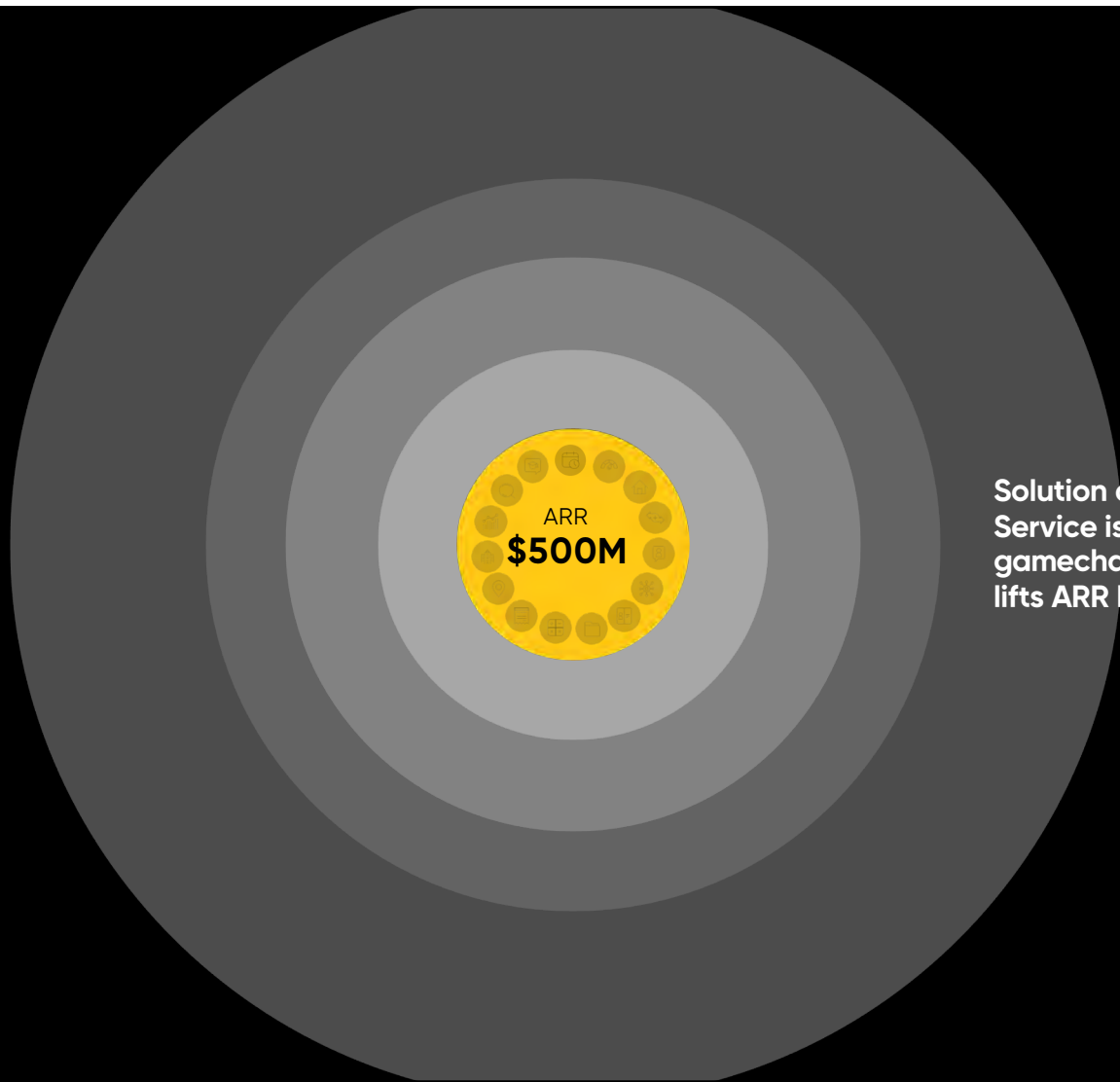


R&D over next 5 years doubles APAC ARR whitespace from \$2b to \$4b

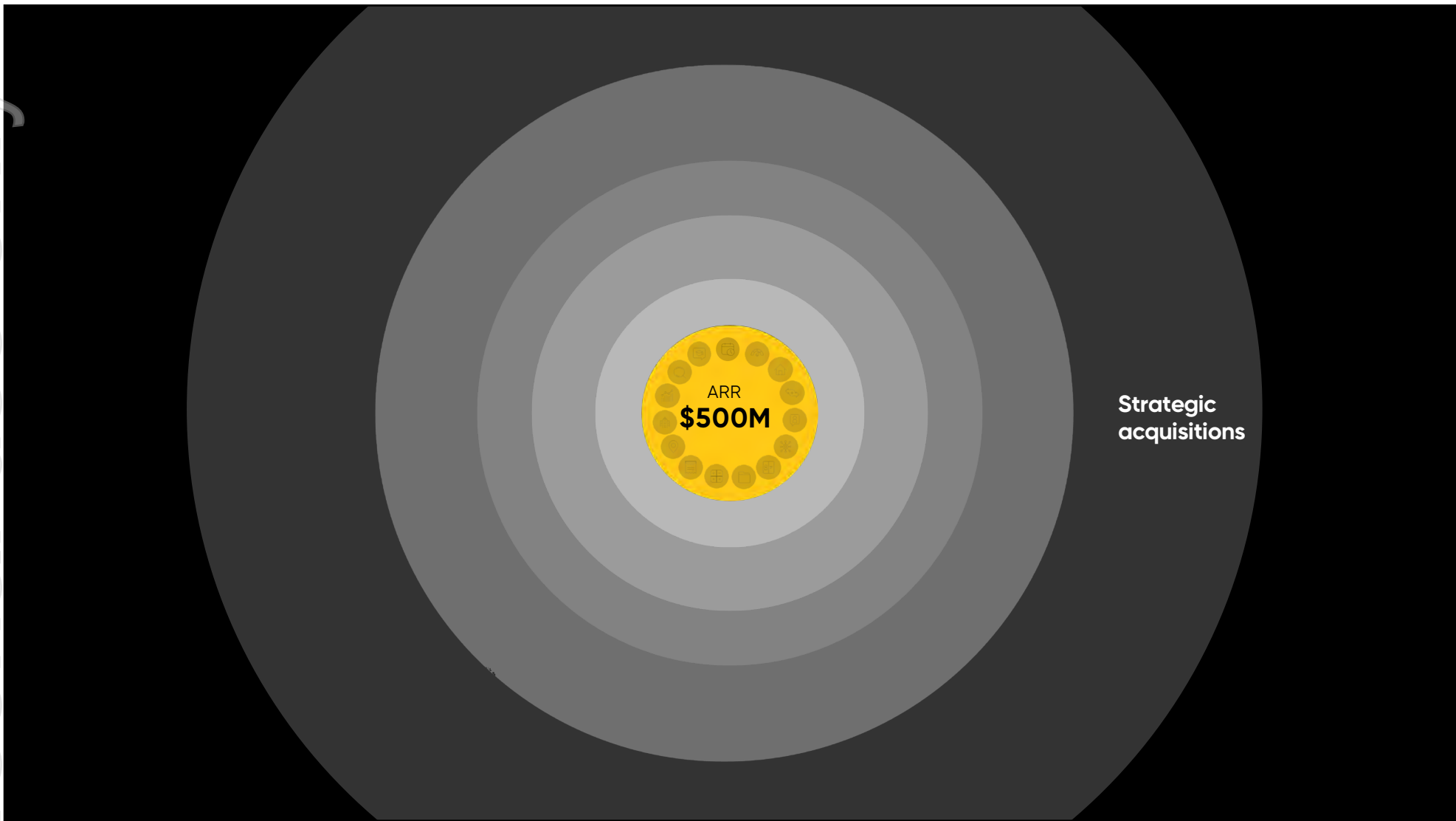


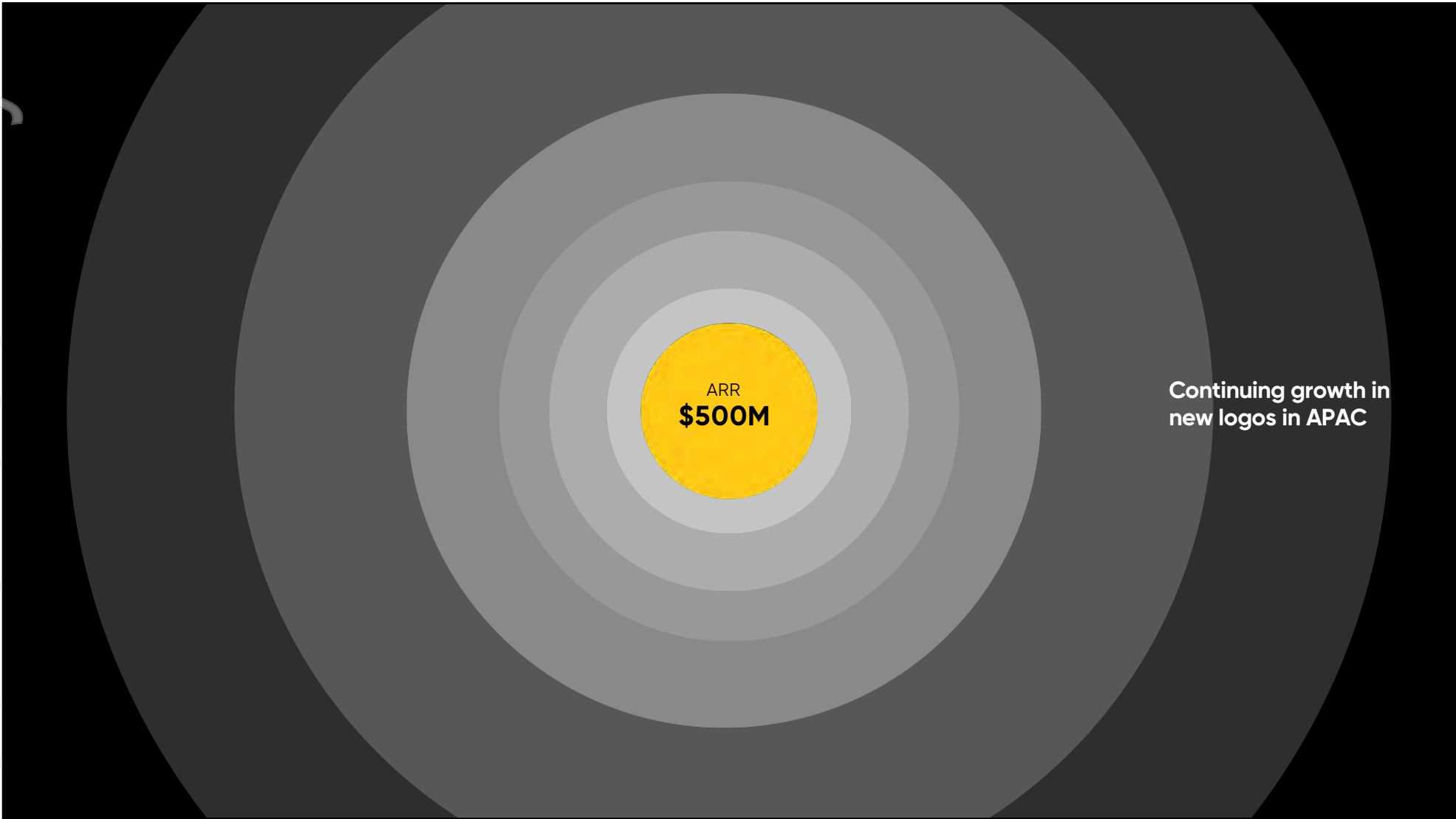
R&D over next 5 years doubles APAC ARR whitespace from \$2b to \$4b

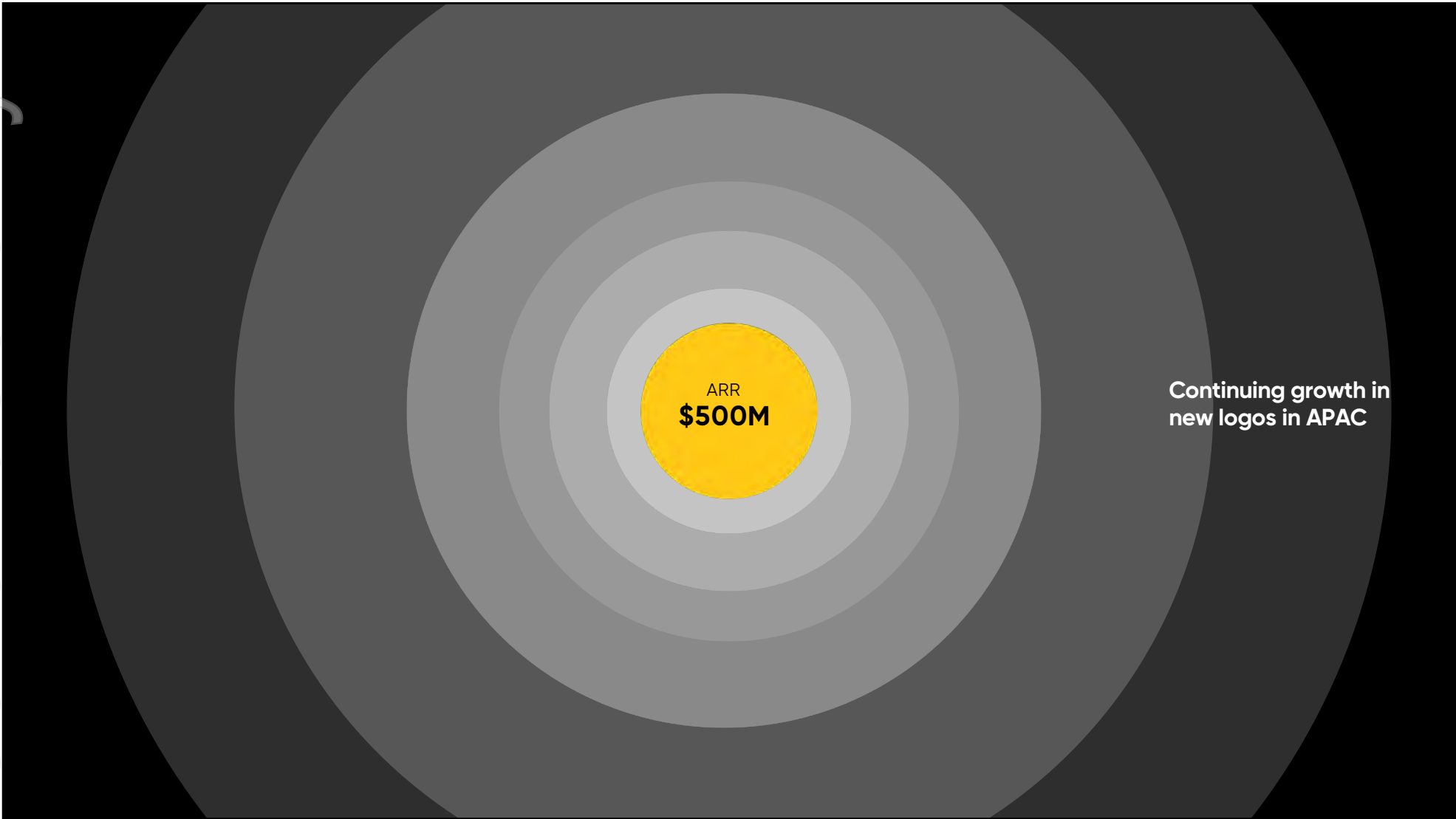
- DxP Student
- DxP LG
- App Builder
- Additional products and modules

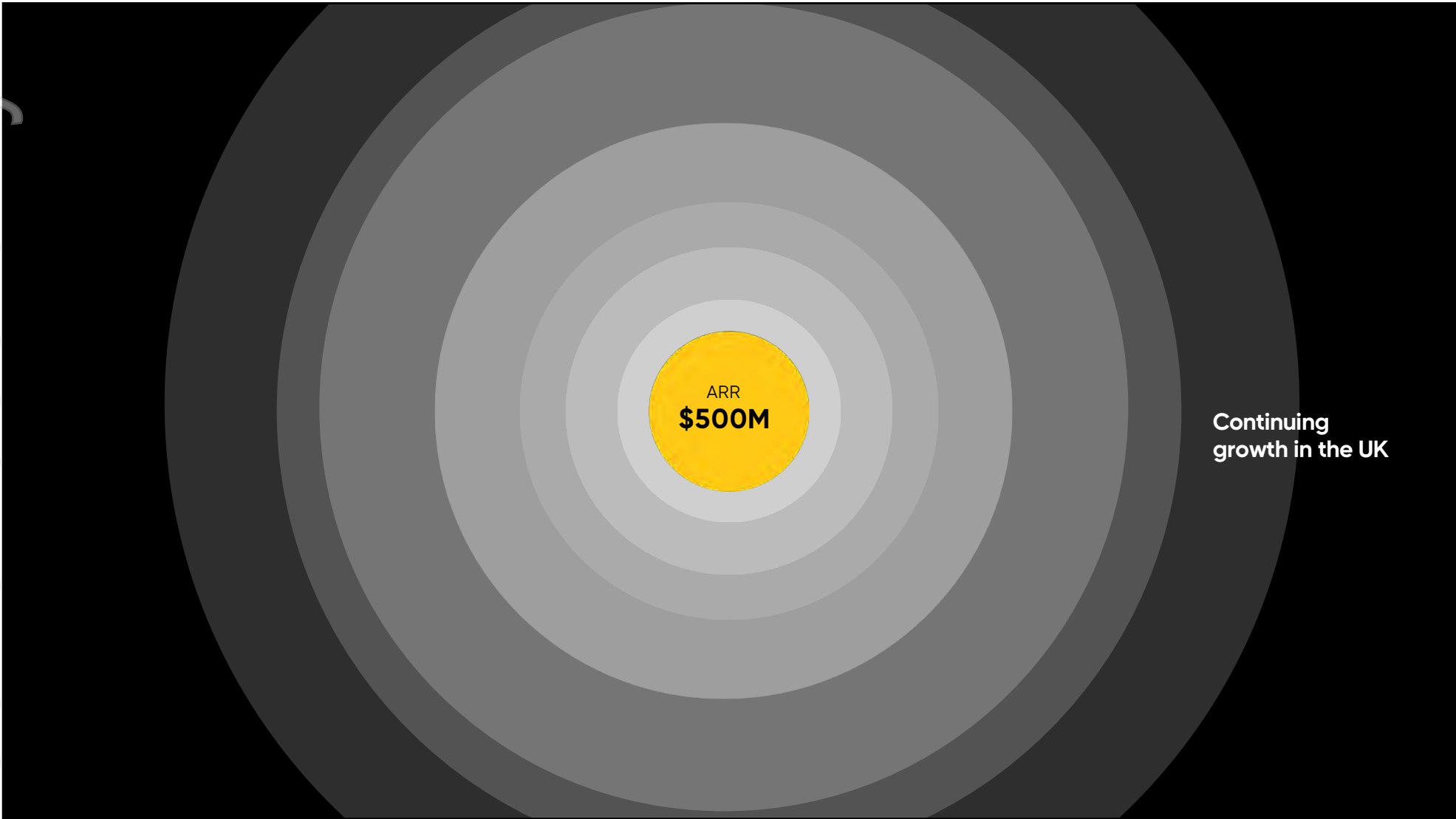


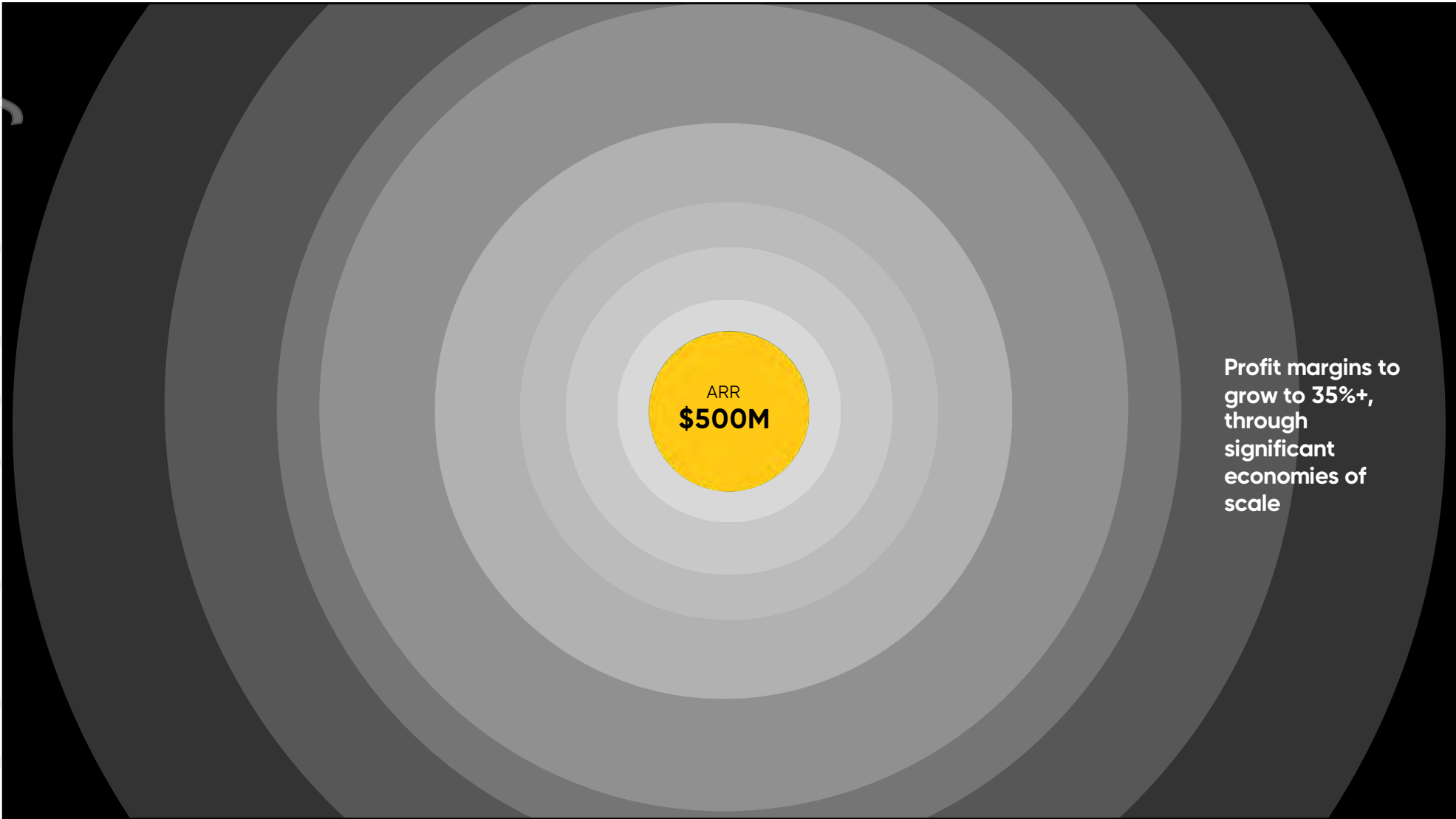
Solution as a Service is a gamechanger, lifts ARR by 40%











ARR
\$500M

Multiple Platforms for Growth

Strong Net Revenue Retention (NRR) of 115-120%

Licence by users and cpi

\$2b of ARR whitespace in our APAC customer base

R&D over next 5 years doubles APAC ARR whitespace from \$2b to \$4b

Solution as a Service is a gamechanger, lifts ARR by 40%

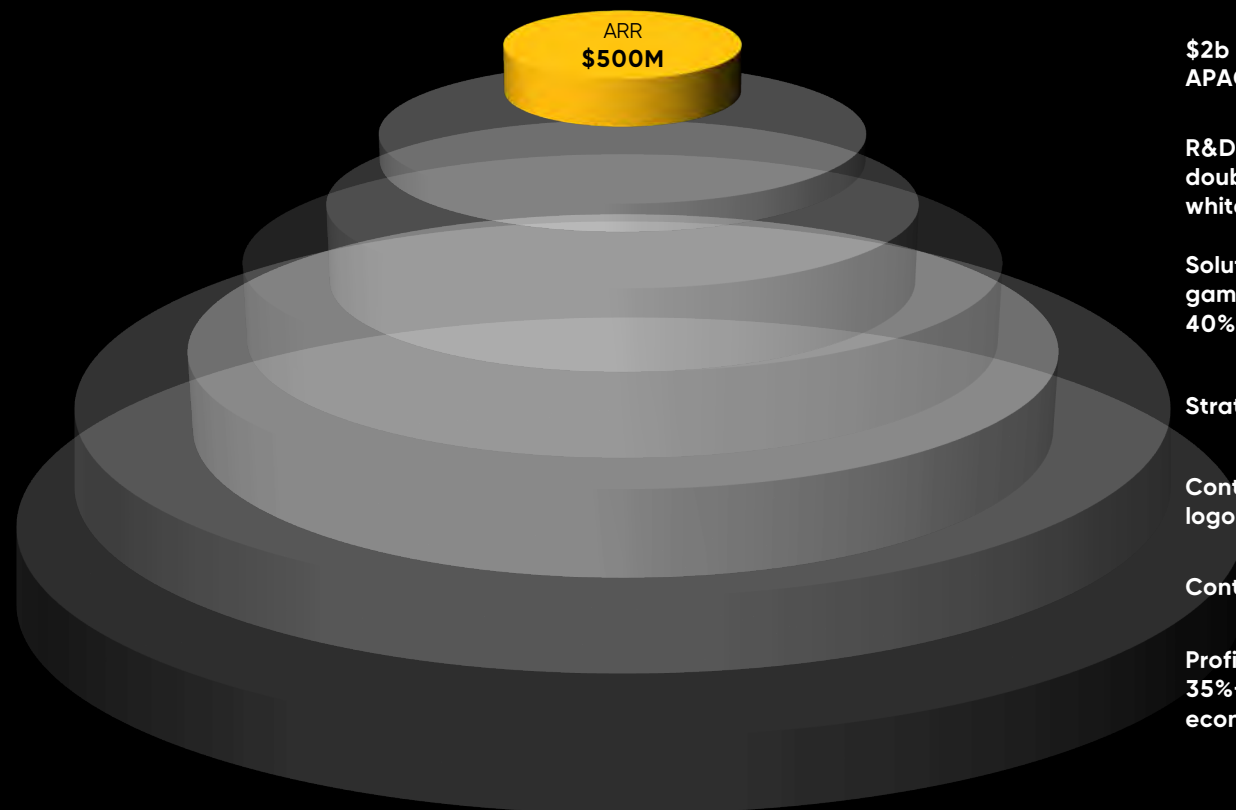
Strategic acquisitions

Continuing growth in new logos in APAC

Continuing growth in the UK

Profit margins to grow to 35%+, through significant economies of scale

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Strong Net Revenue Retention (NRR) of 115-120%

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Strategic acquisitions

Continuing growth in new logos in APAC

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Profit margins to grow to 35%+, through significant economies of scale



**Continue to double in
size every 5 years**

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\$1B+ ARR

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\$1B+ ARR by FY30

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1:00 - 1:45	Lunch & Product Booths
1:45 - 2:00	Summary
2:00 - 2:30	Q&A

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THE HILLS
Sydney's Garden Shire

Michael Edgar

CEO

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Roads and infrastructure

Council

Transport

Community halls

Libraries

Ports and Airports

Parks and campgrounds

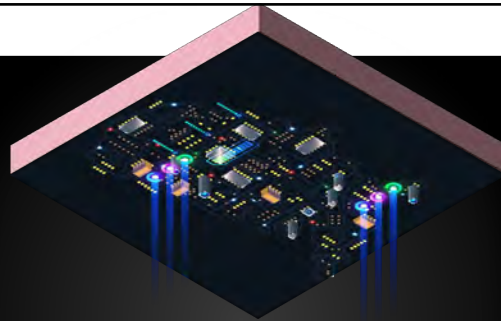
Aquatic centre


Housing

Water and sewerage



THE HILLS
Sydney's Garden Shire



 Volunteer Management	 Disaster alerts	 Museum & Art Gallery Collection	 Rostering	 My Community Directory	 Environmental safety
 Library Management	 Enterprise Content Management	 Property and Rating	 Enterprise Asset Management	 Enterprise Budgeting	 Volunteer Management
 Spatial	 Performance Planning	 Supply chain management	 Financials	 Human Resources and Payroll	 Rostering
 Award Interpreter	 Website/Intranets	 Disaster Management	 Bookings	 Community Grants	 My Community Directory
 Volunteer Management	 Rostering	 My Community Directory	 Performance planning	 Long Term Financial Planning	 environmental safety



OneCouncil

Enterprise software for local government

73% of Australian and New Zealand residents live in a council powered by TechnologyOne

Key facts

Products

- Contract Management
- Enterprise Asset Management
- Enterprise Budgeting
- Financials
- HR and Payroll
- Property and Rating
- Supply Chain Management

Competitors

- Oracle
- Civica
- ReadyTech
- Datacom
- SAP
- Infor
- Microsoft
- Salesforce
- Unit4
- NEC
- Advanced
- Capita Integra/Centros
- Infor/Total Mobile
- MHR/Zellis
- Workday

Customer Numbers

348

TOTAL

3.2b

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DEMO

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 technologyone



River City
University

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 **technologyone**



 **River City**
University

Graduation

Lectures

Library

Admin

Sports fields

Car parks

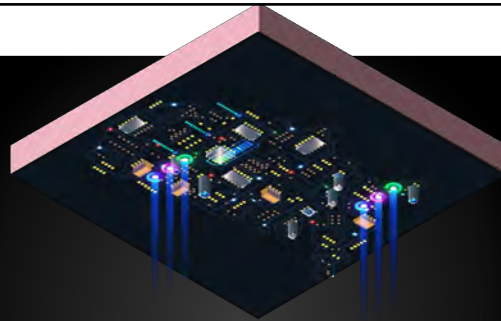
Accommodation

Retail and dining

Facilities

Religious centre

Public Transport



Volunteer Management	Disaster alerts	Library management	Rostering	My Community Directory	Environmental safety
Library Management	Student management	Corporate performance management	Enterprise Asset Management	Enterprise Budgeting	Volunteer Management
Student accommodation	Timetable and scheduling	Supply chain management	Financials	Human Resources and Payroll	Rostering
Award Interpreter	Website/Intranets	Disaster Management	Bookings	Community Grants	My Community Directory
Volunteer Management	Rostering	Student Directory	Performance planning	Long Term Financial Planning	environmental safety



OneEducation

Enterprise software for educational institutions.

Empowering over 6.5 million students globally, and mobilising over 90 per cent of higher education in Australia and New Zealand.

Key facts

Products

- Business Analytics
- Contact Management
- Enterprise Budgeting
- Enterprise Cash
- Receipting
- Financials
- HR and Payroll
- Supply Chain
- Management
- Student Management
- Timetable and Scheduling

Competitors

- Tribal
- Ellucian
- Oracle Peoplesoft
- Callista
- SAP
- Workday
- ReadyTech
- Time Edit
- JDR Software
- Microsoft Dynamics 365
- Salesforce

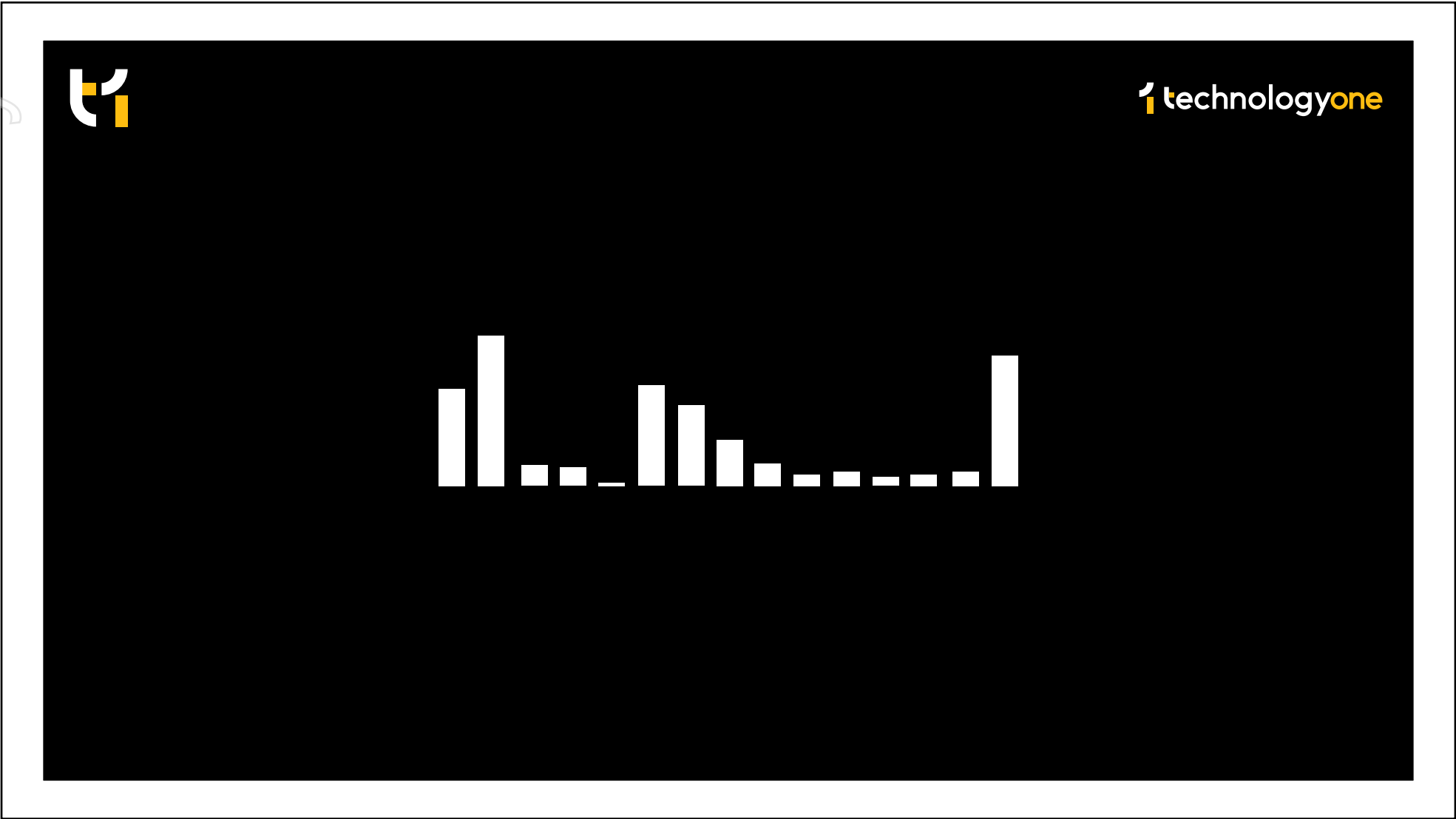
Customer Numbers

500+ institutions

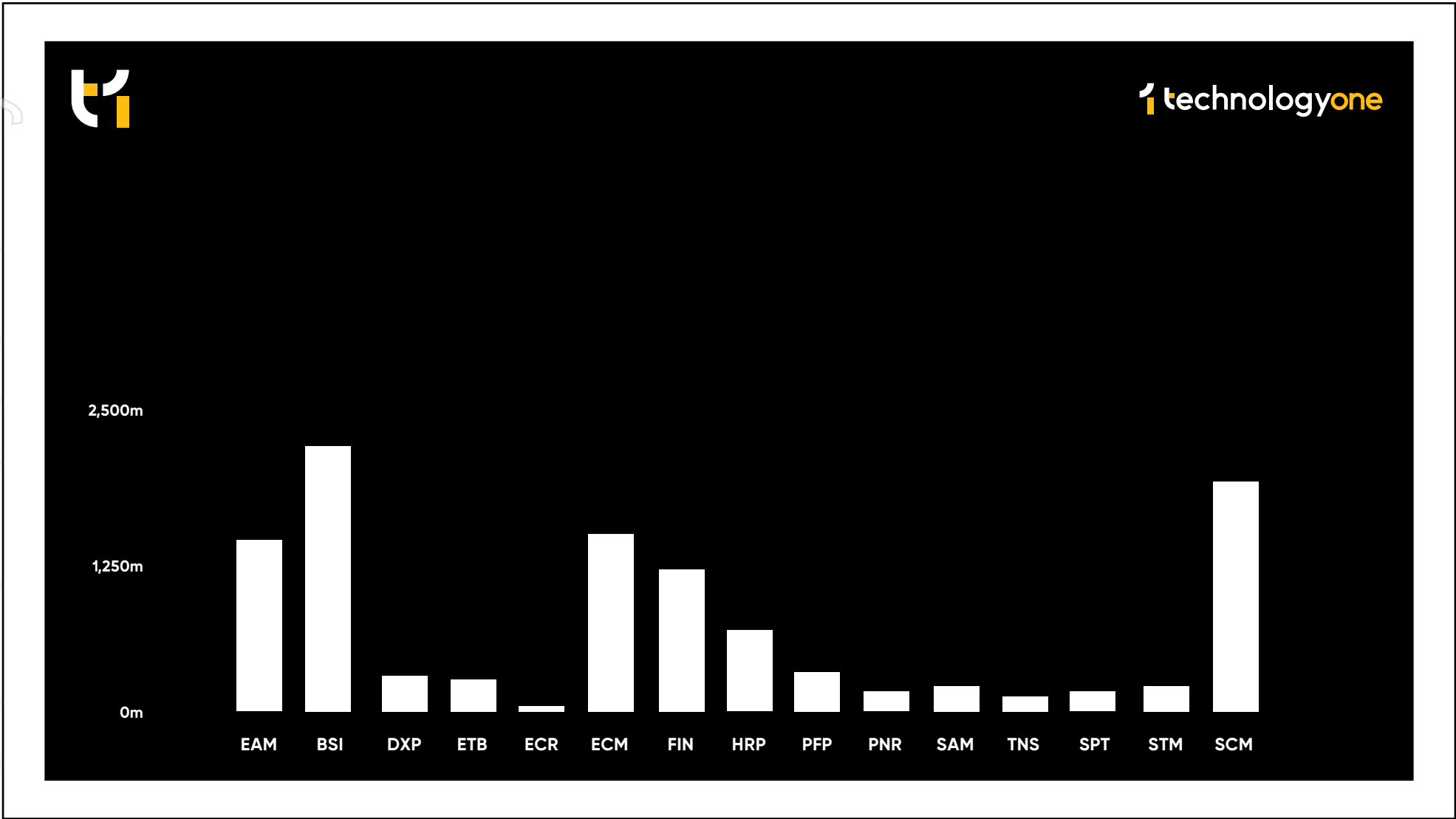
TOTAL

2.6b

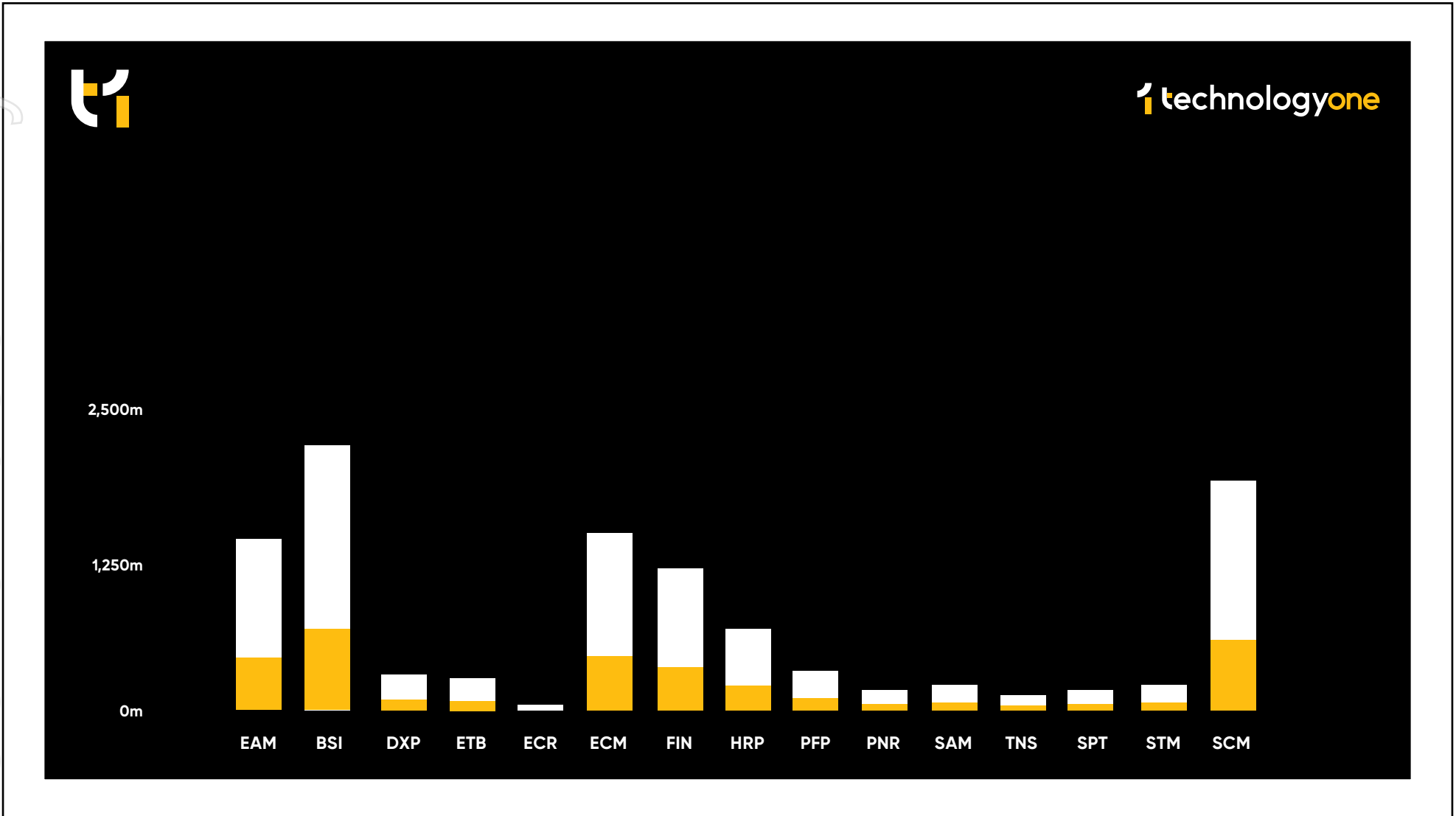
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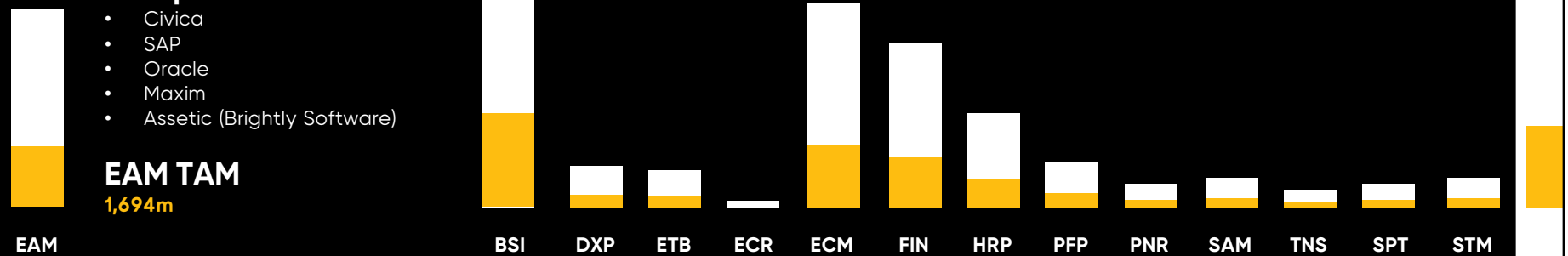


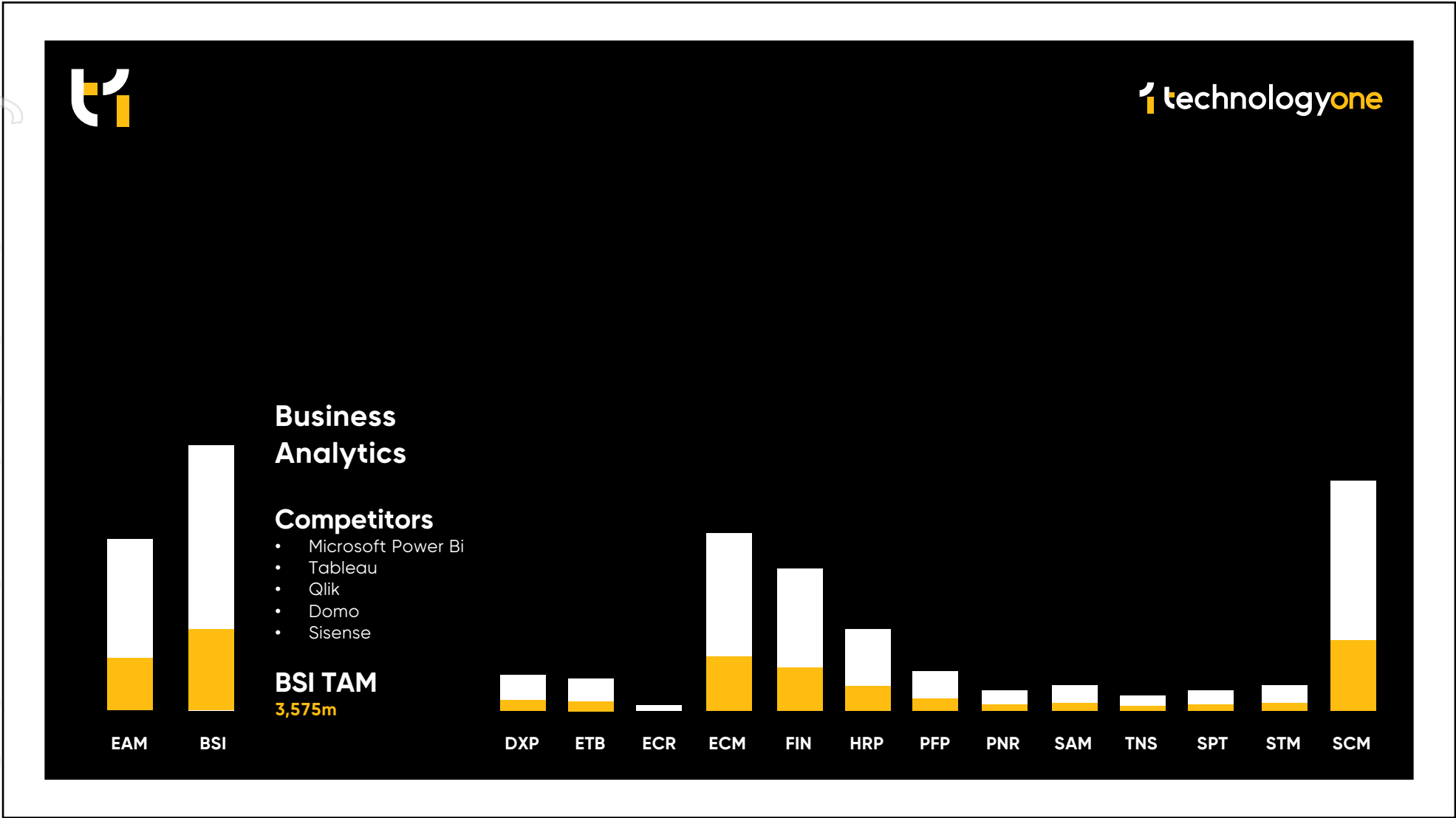
Enterprise Asset Management

Competitors

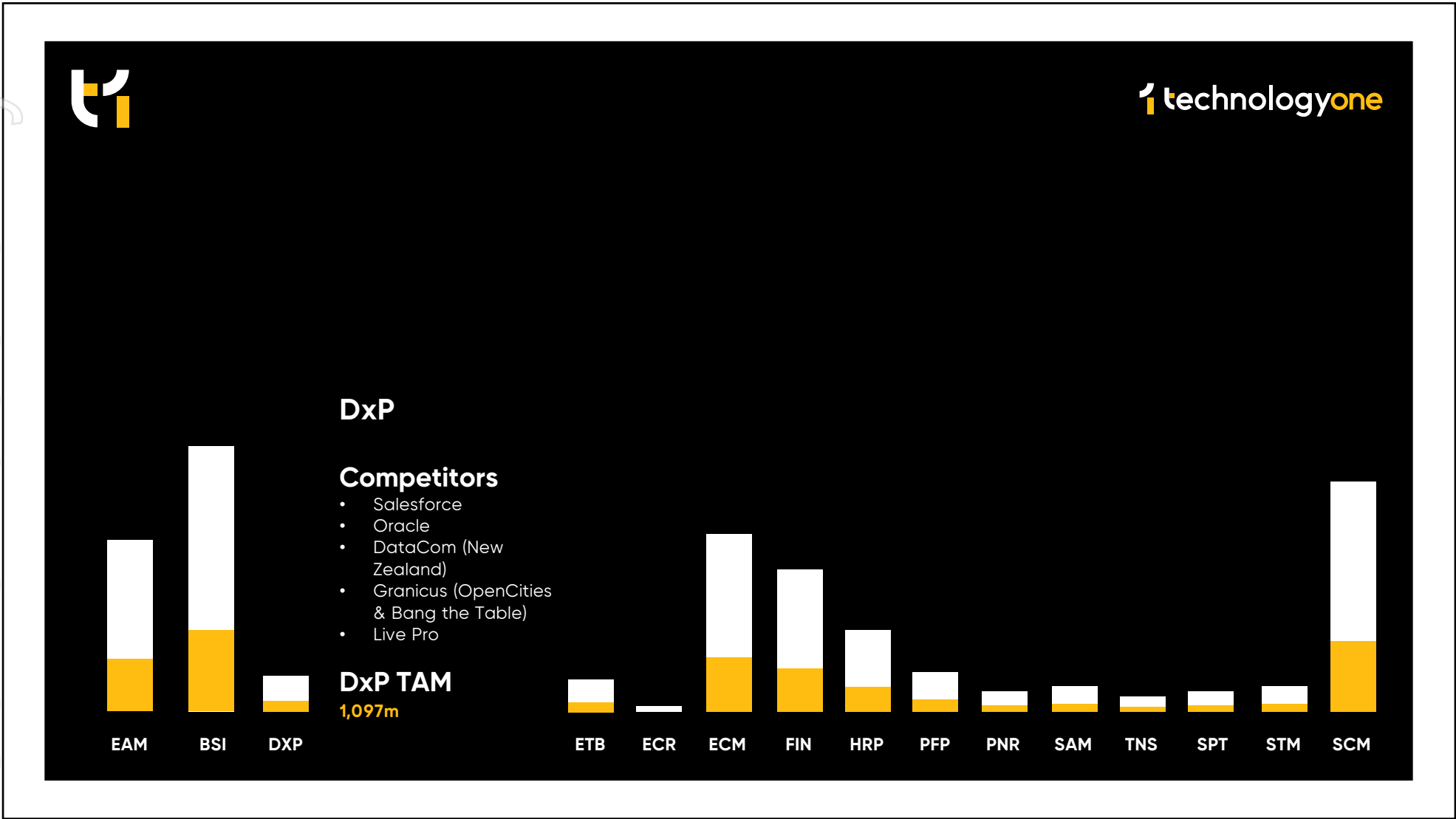
- Civica
- SAP
- Oracle
- Maxim
- Assetic (Brightly Software)

EAM TAM
1,694m





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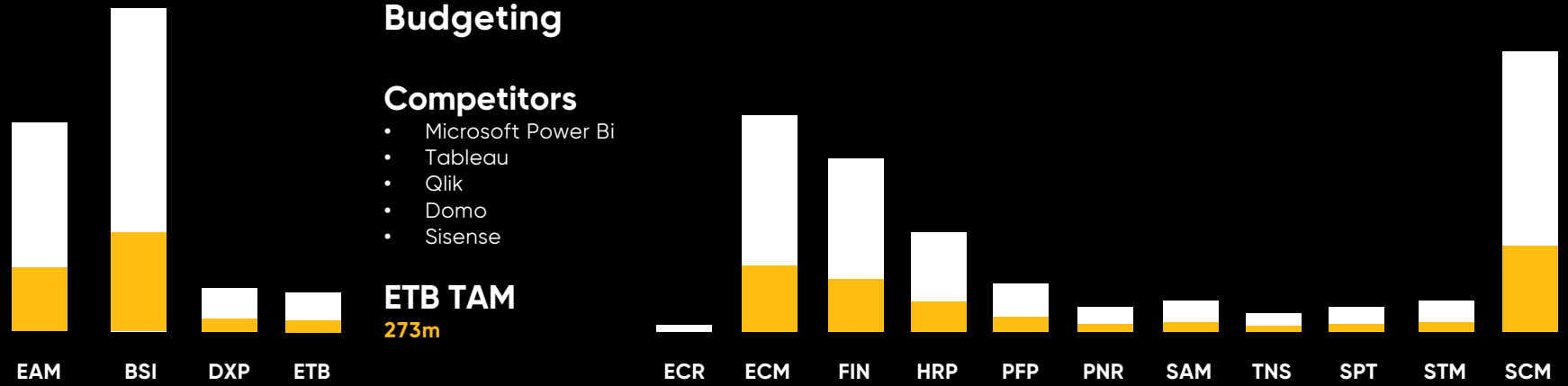


Enterprise Budgeting

Competitors

- Microsoft Power Bi
- Tableau
- Qlik
- Domo
- Sisense

ETB TAM
273m



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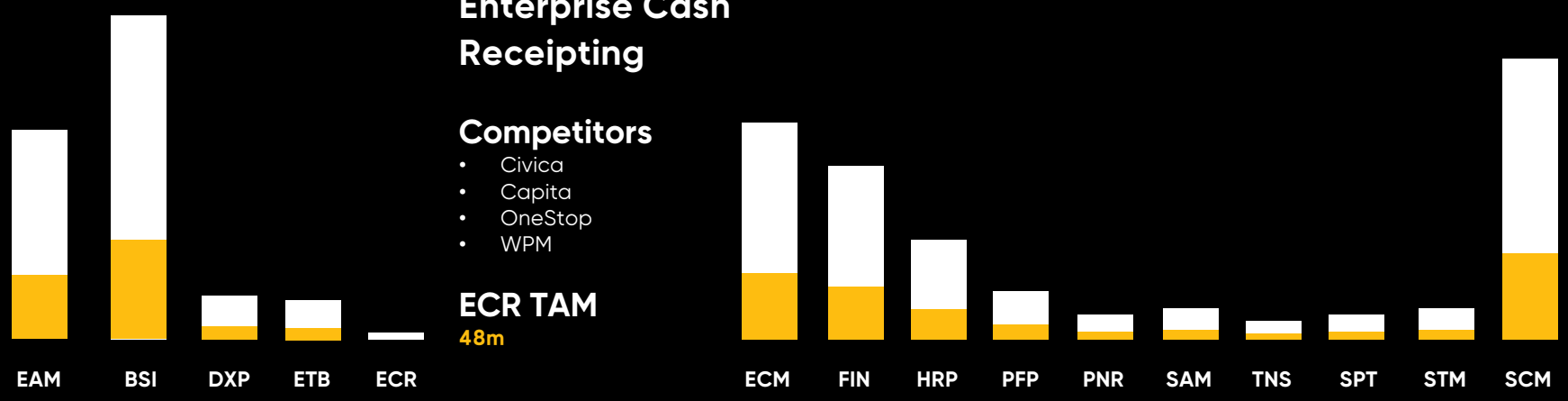


Enterprise Cash Receiving

Competitors

- Civica
- Capita
- OneStop
- WPM

ECR TAM
48m

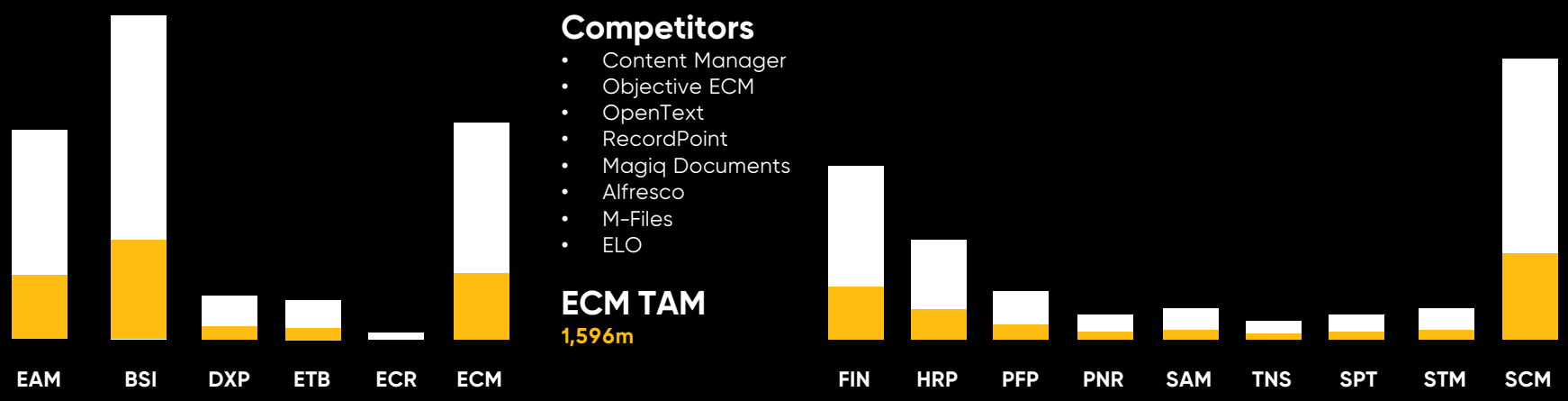




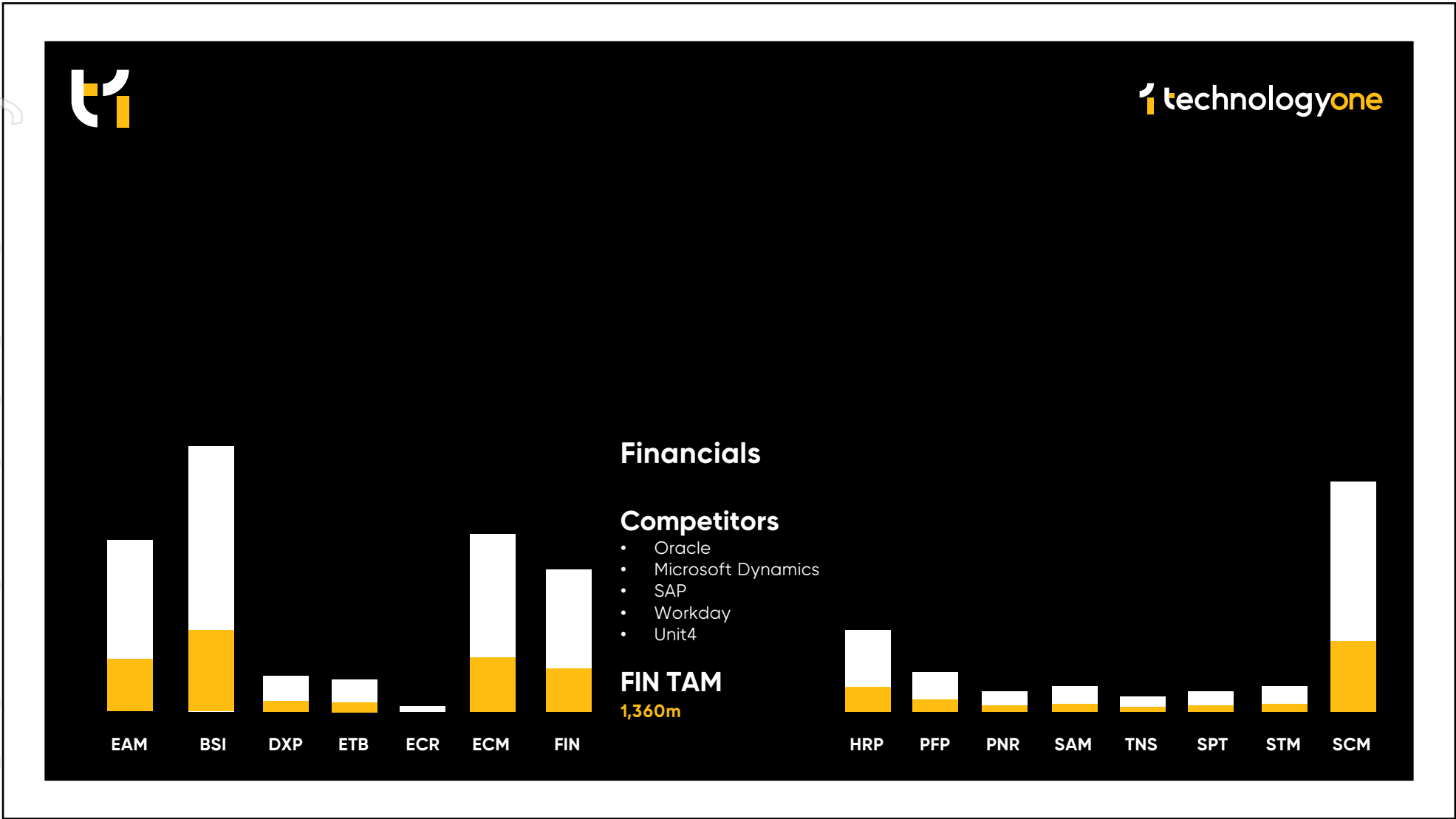
Enterprise Content Management

- Competitors**
- Content Manager
 - Objective ECM
 - OpenText
 - RecordPoint
 - Magiq Documents
 - Alfresco
 - M-Files
 - ELO

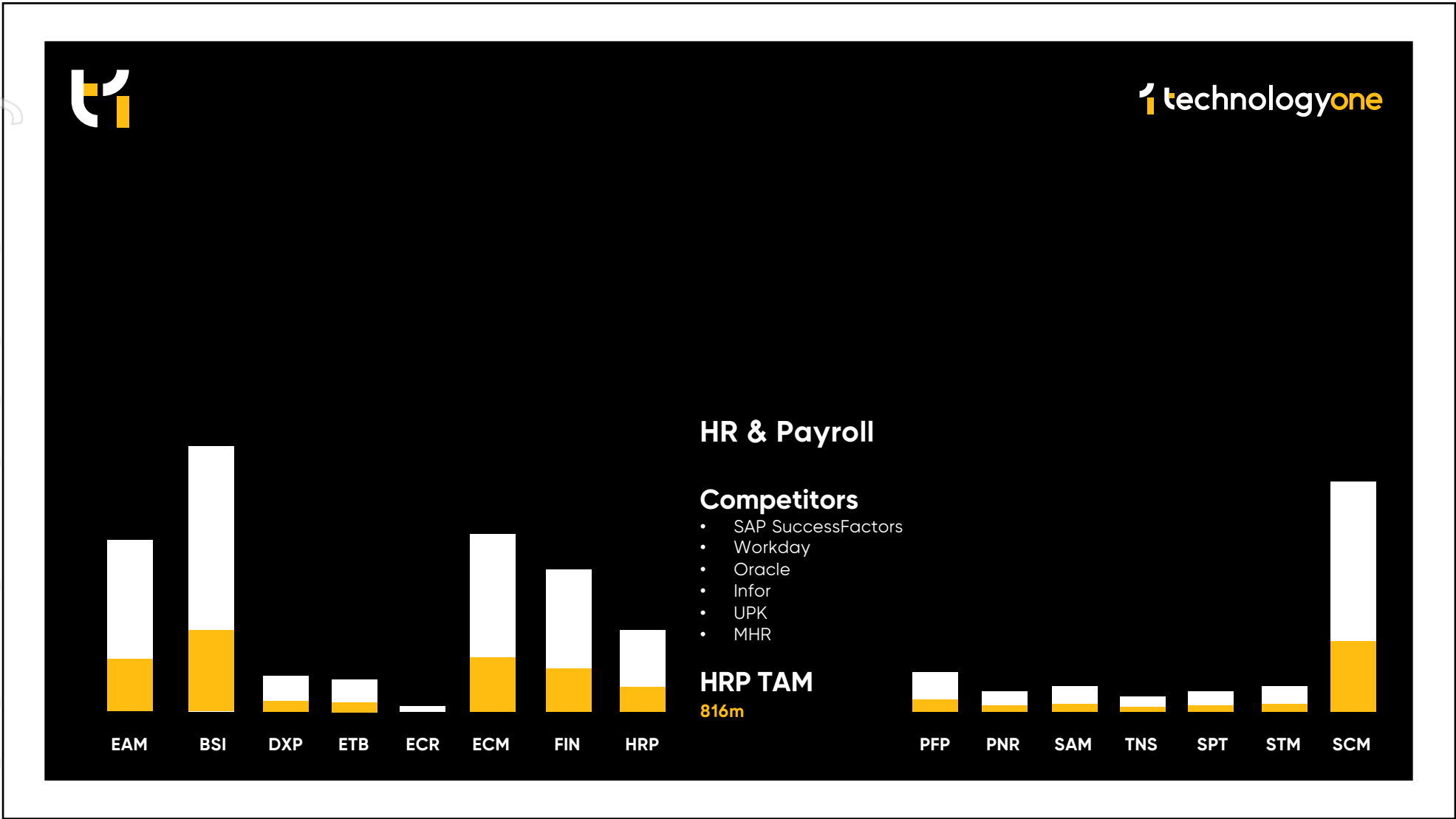
ECM TAM
1,596m



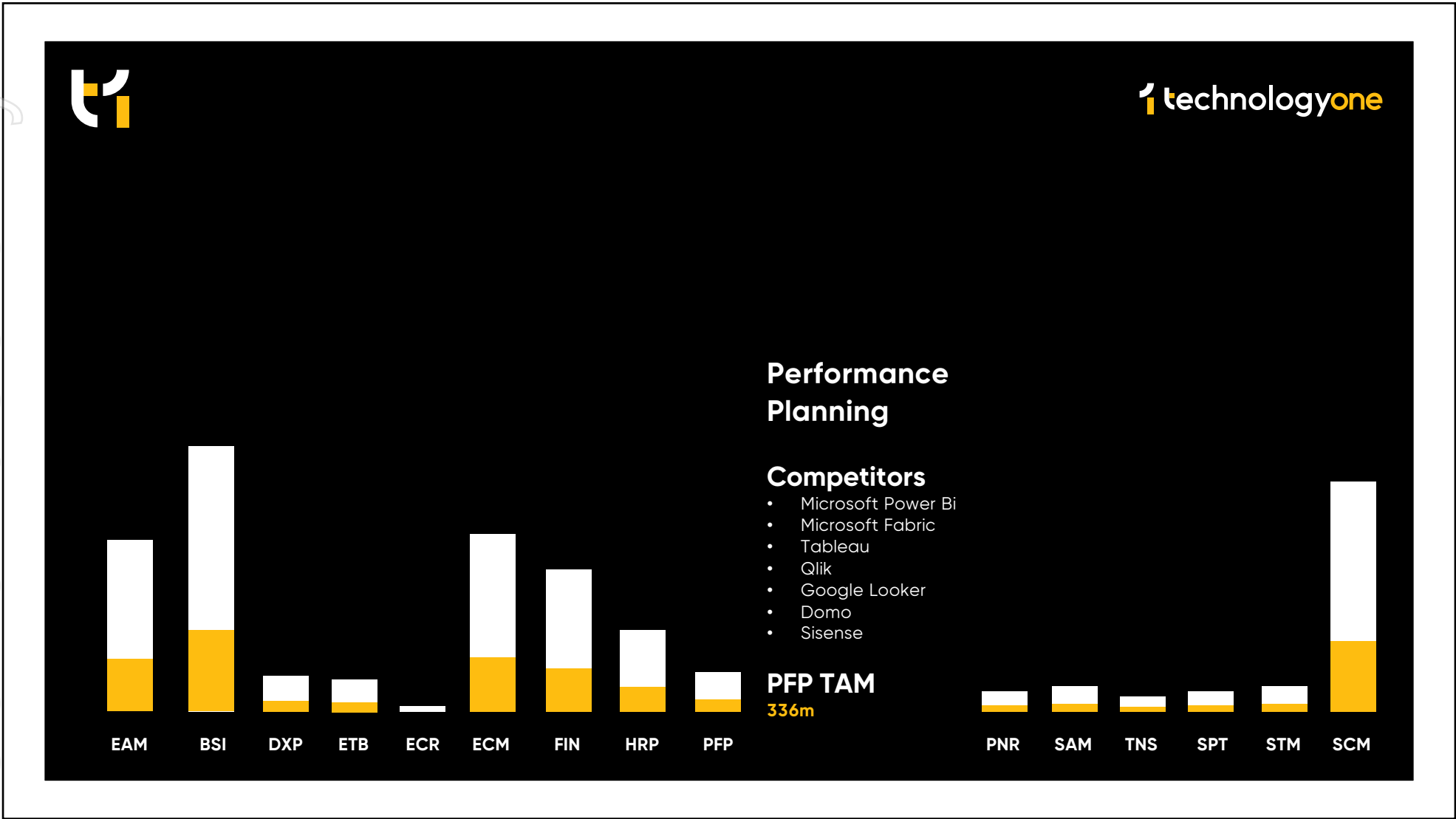
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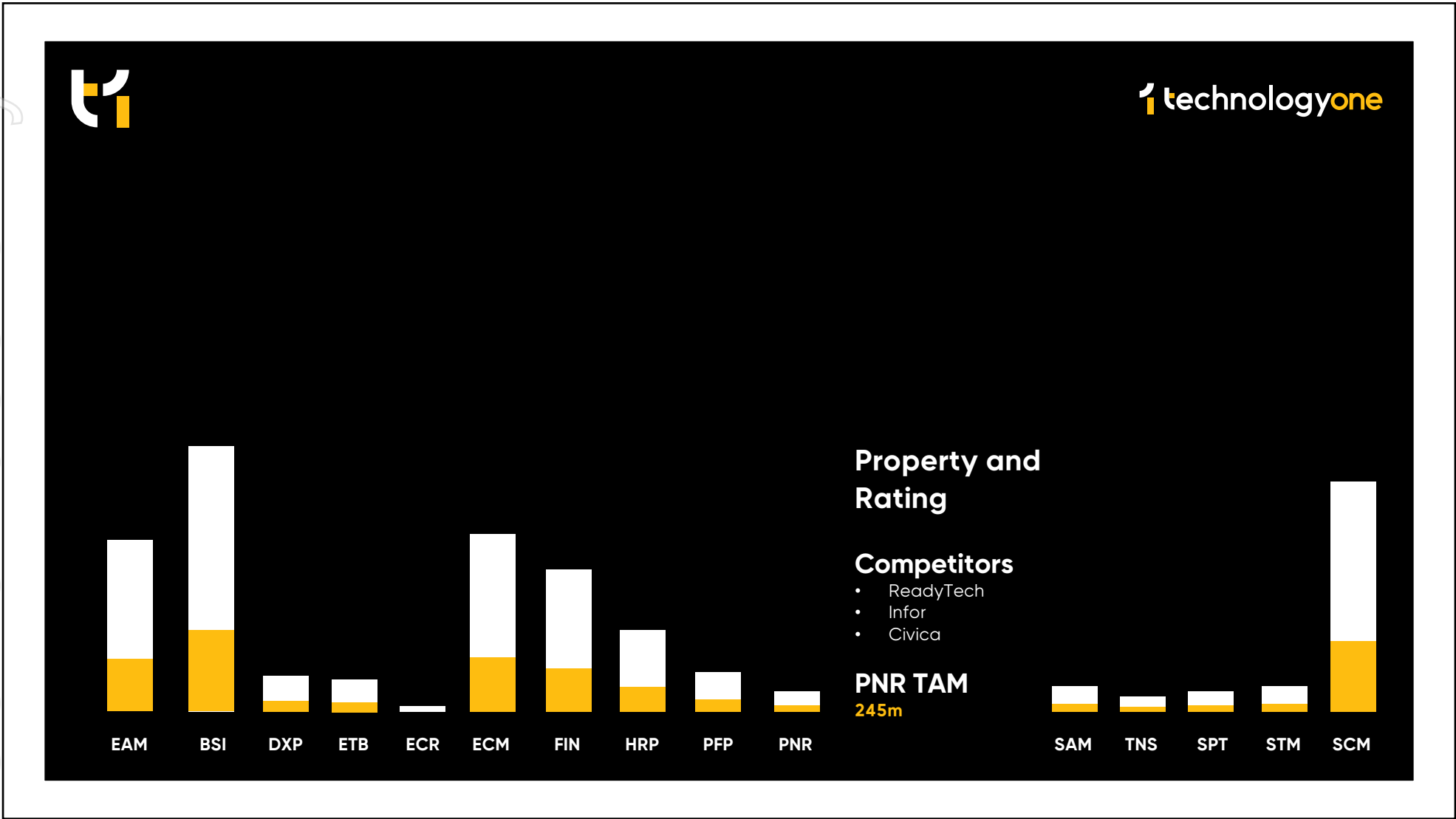
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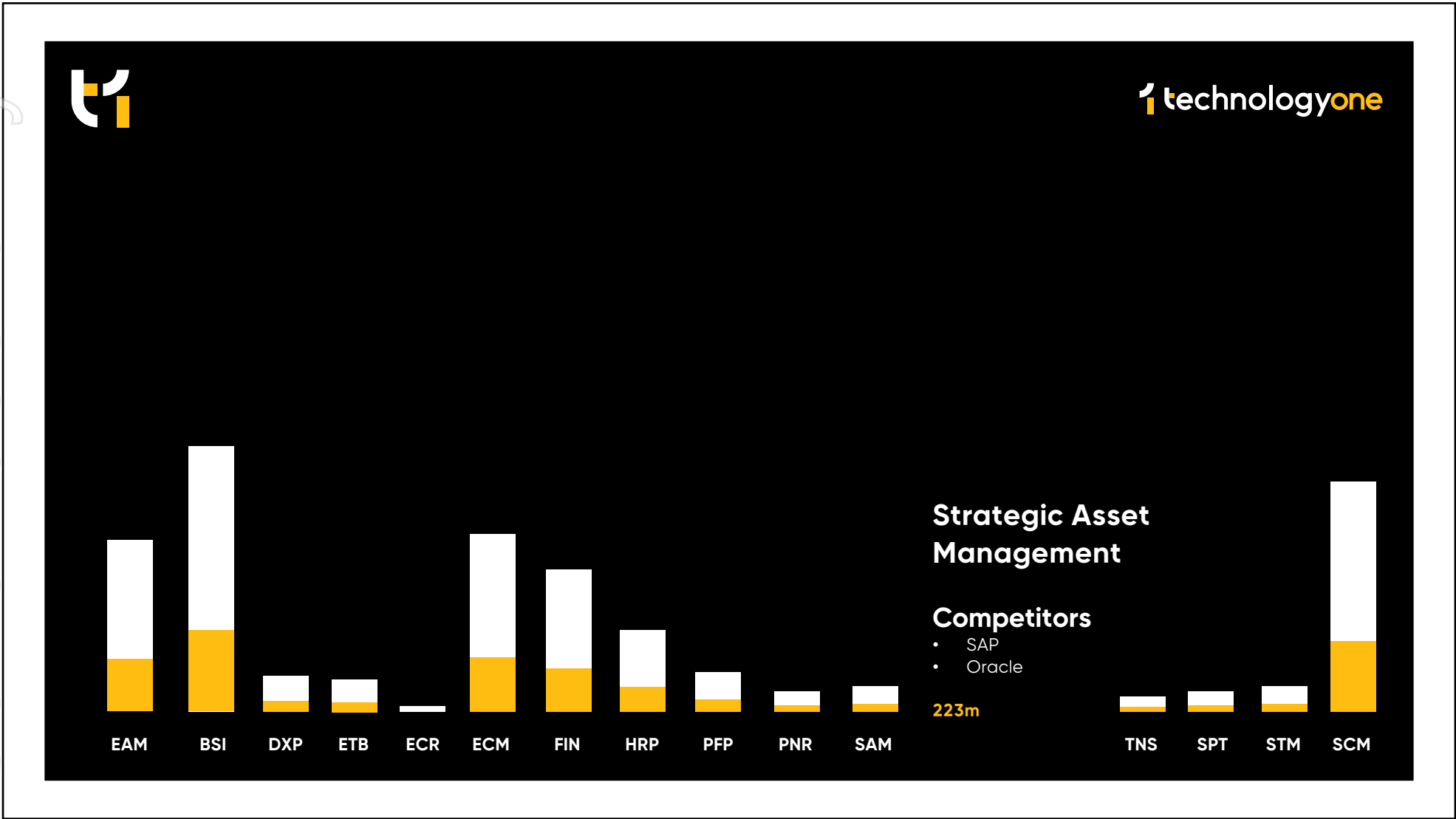
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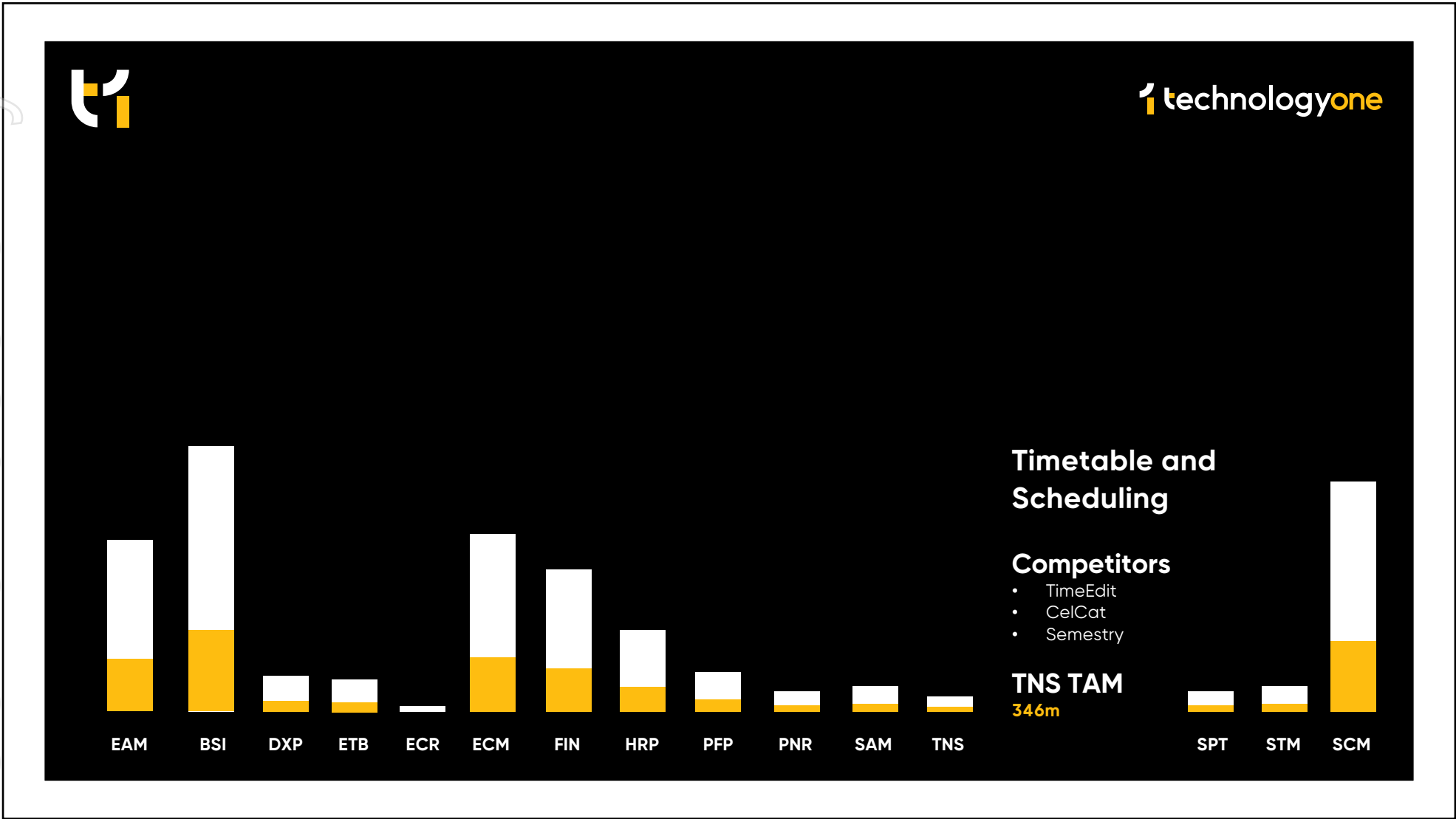
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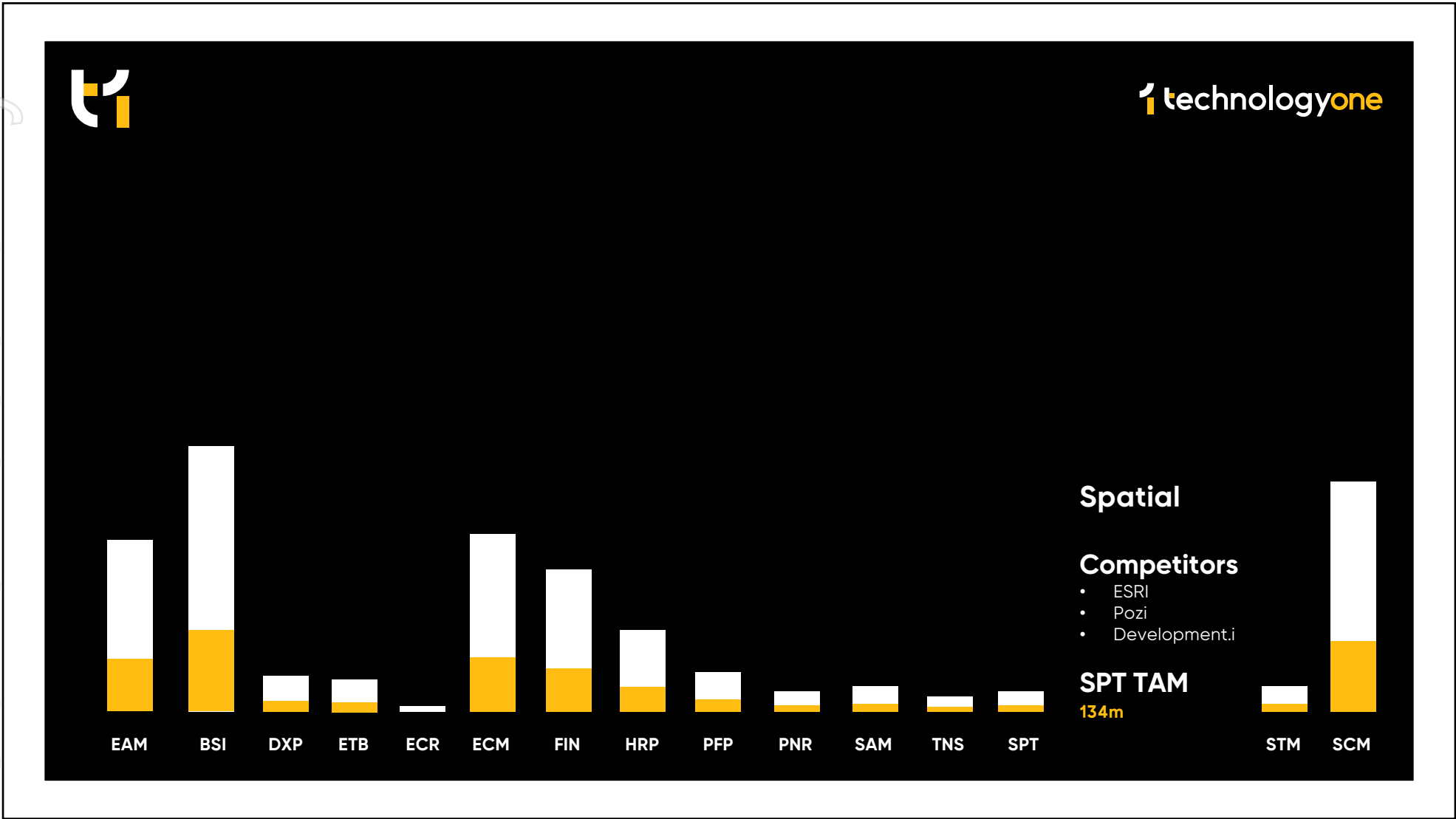
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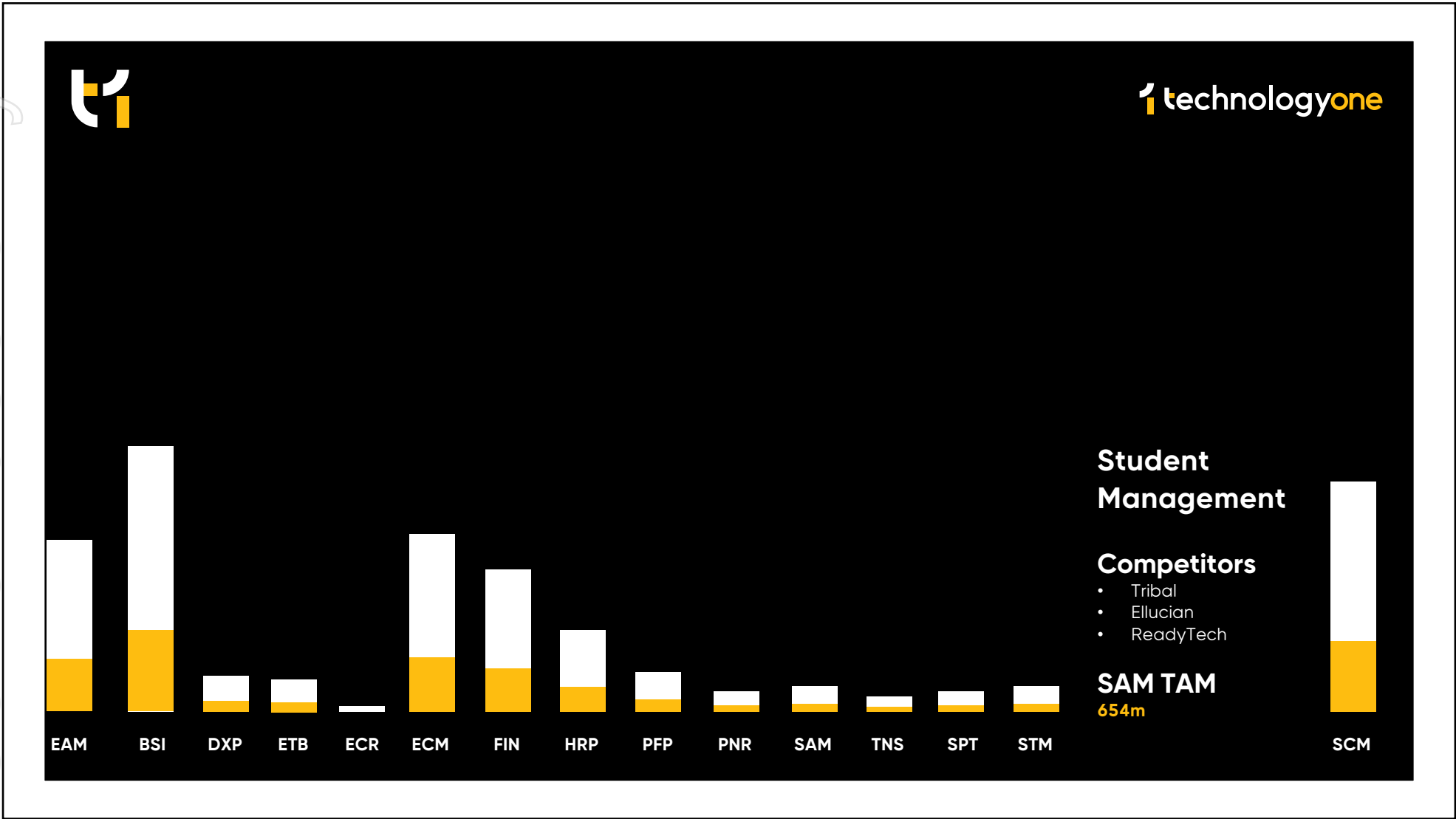
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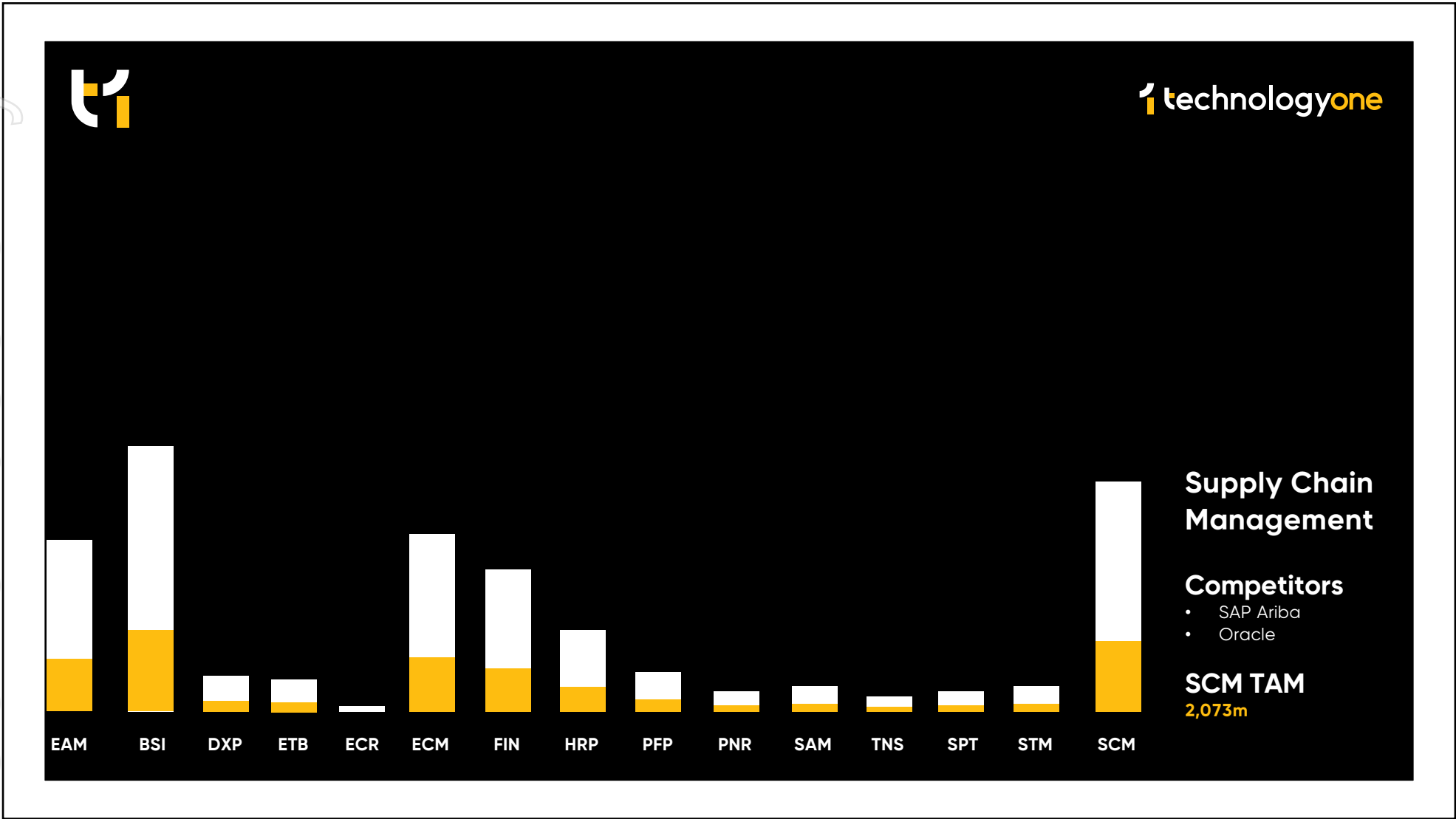
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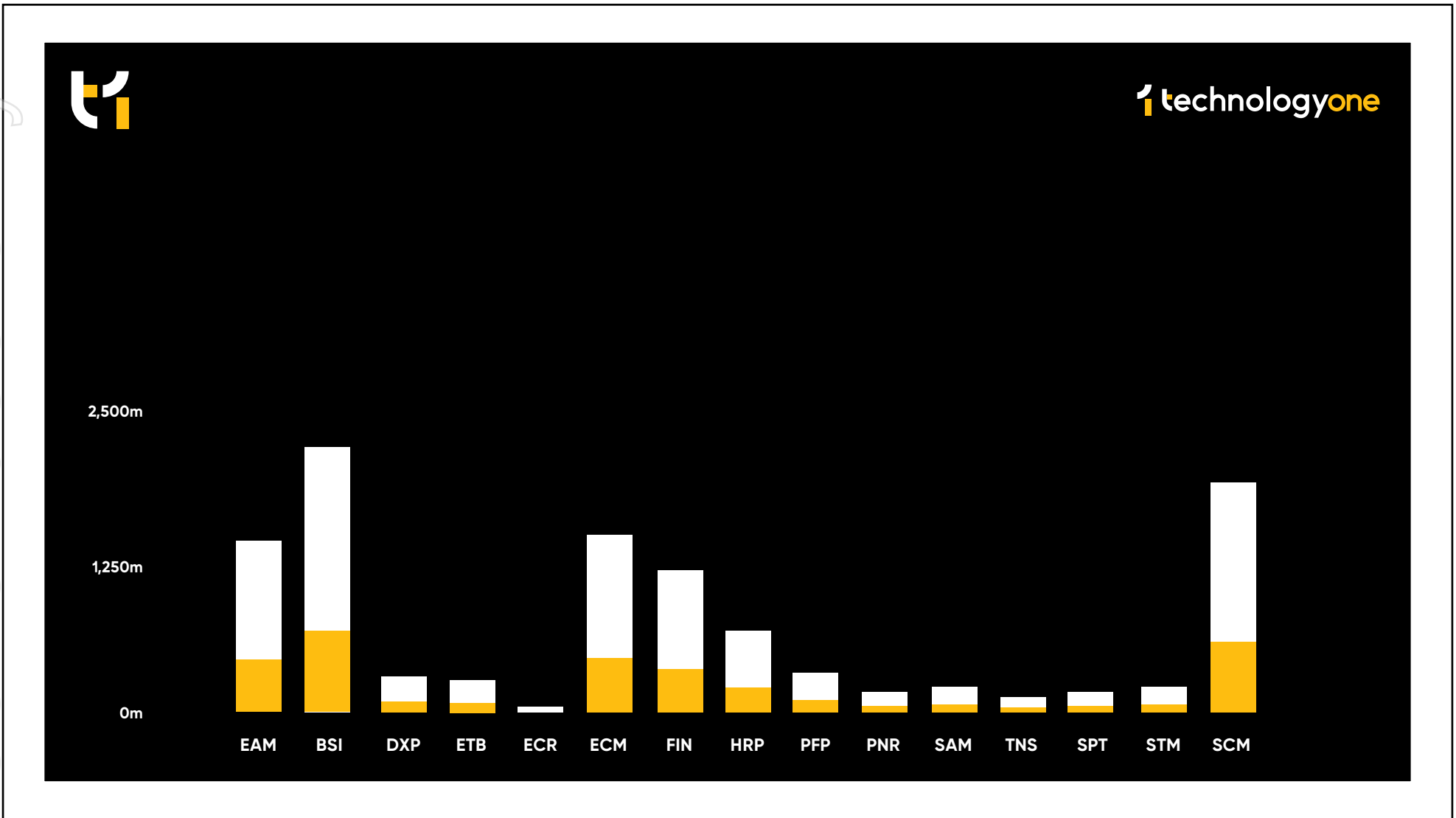
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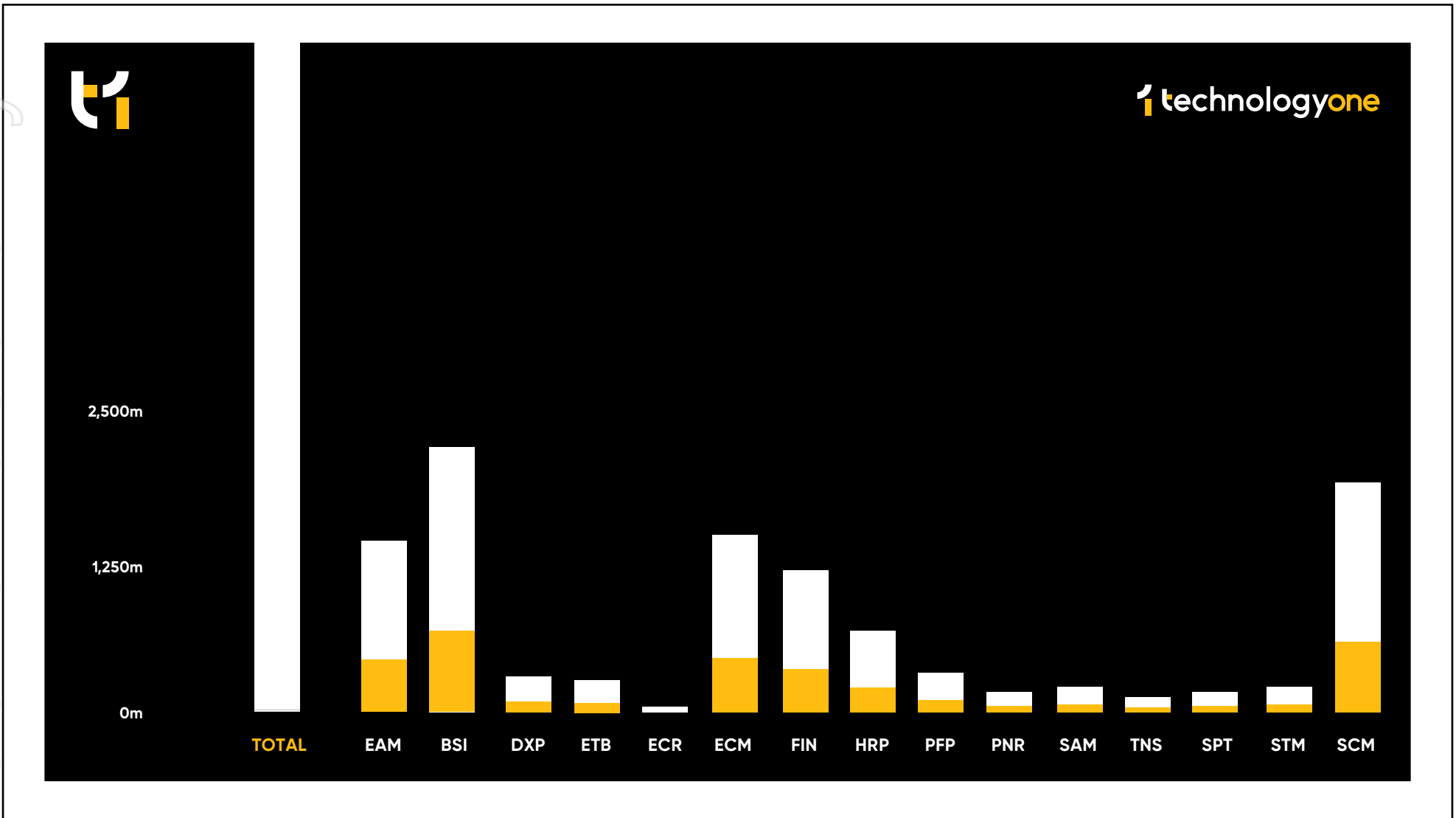
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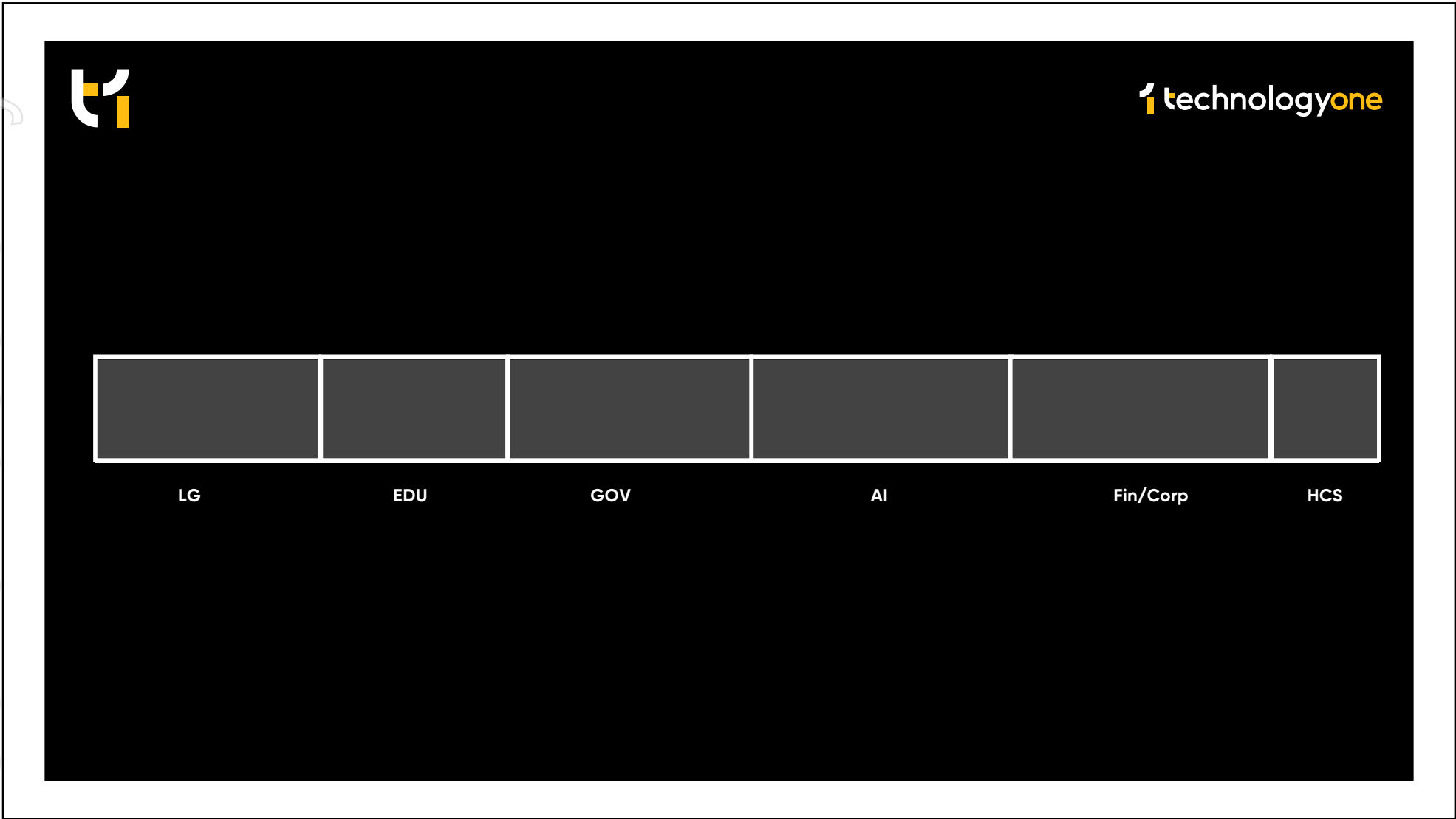
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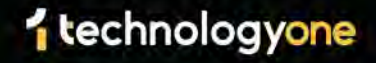
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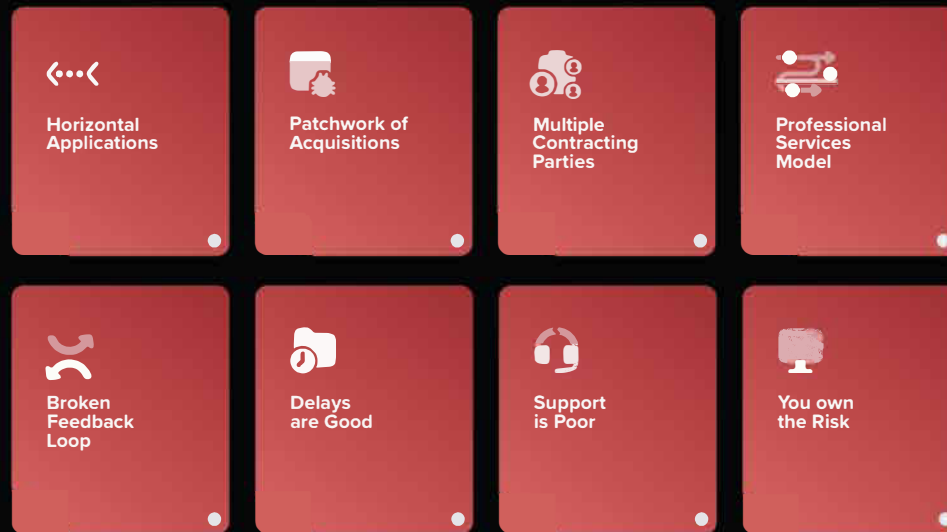
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SaaS+



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SaaS+

- Horizontal Applications
- Patchwork of Acquisitions
- Broken Feedback Loop
- Delays are Good
- Multiple Contracting Parties
- Professional Services Model
- Support is Poor
- You own the Risk

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SaaS+

- Designed for your Industry.
- One code-line.
- Tight Feedback Loop
- Fastest Time to Value
- One Hand to Shake
- Rapid Deployment Model
- Support is End to End
- We Own the Risk



SaaS+

n. noun. /sæs Plus/ (computing):

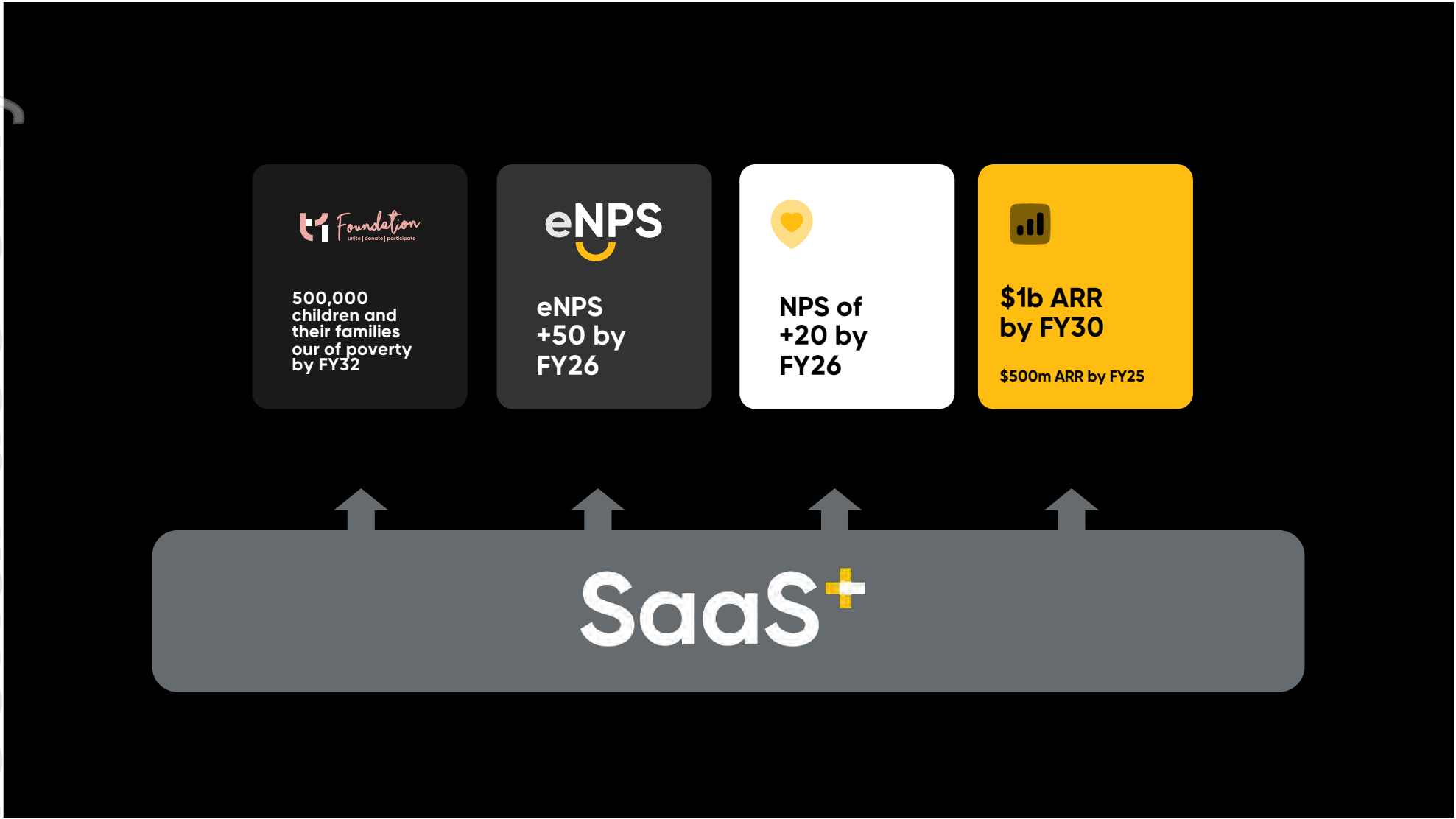
Delivering an end to end solution built with the customer in mind so they can focus on the communities they serve. (the abbreviation for 'solution as a service')

.....

With SaaS Plus, TechnologyOne takes full responsibility for the solution experience - reducing risk and saving time and money for our customers.

One plan, one price, one point of call.

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 technologyone

SaaS+

Financials

SaaS+ financials:

Introduction

3 key takeaways

1

SaaS+ will create a long-term revenue and profit tailwind

2

SaaS+ has driven a strategic focus on productivity

3

This is a long-term strategy

SaaS+ financials: Traditional implementation projects

The traditional consulting approach lacks alignment with customer interests

SaaS+ is a long-term strategic growth pillar; complete flip to consulting model

Traditional implementation financial profile:

1:1.6 Ratio

**Software:
Implementation
fees**

Blackpool Council

**Large
implementation**

**Pitched 1:1,
delivered 1:0.8**

Model Challenge 1

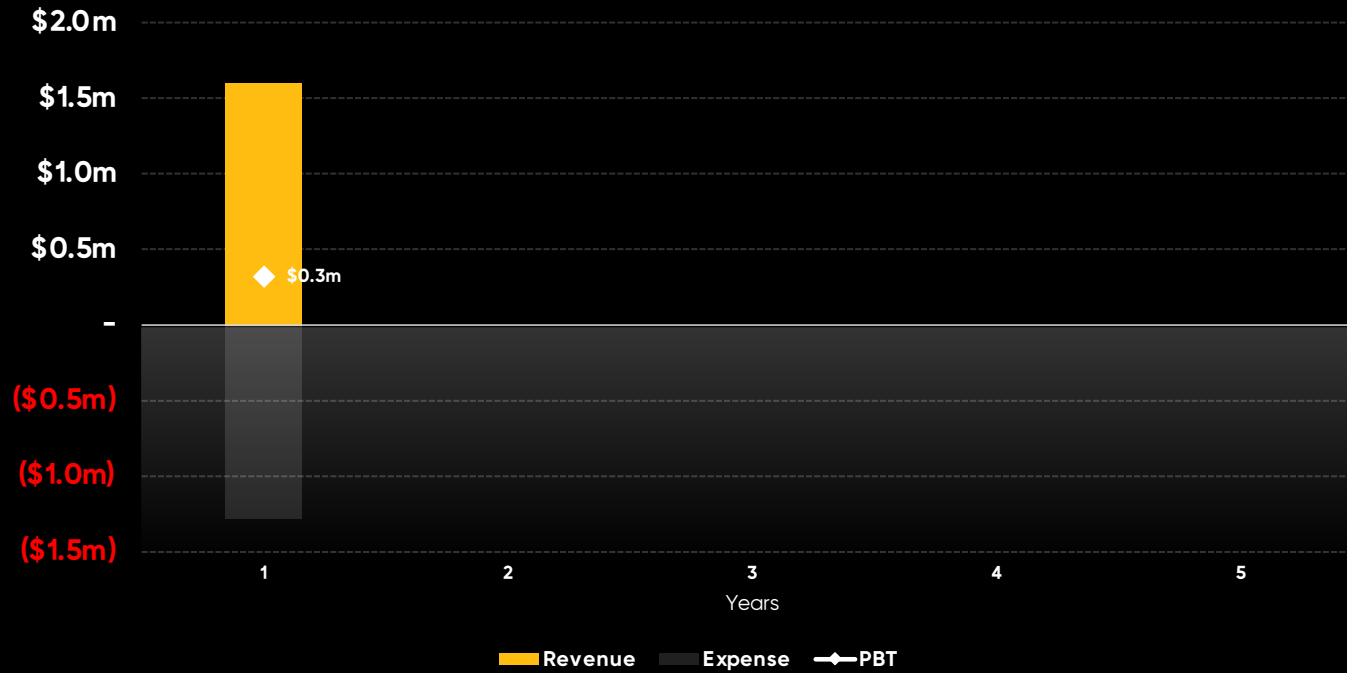
Incentive to complicate to drag out implementation to increase profit

Model Challenge 2

A one-off engagement, poor sustainability

SaaS+ financials: Consulting New Projects

Traditional Consulting Financial Profile



Example

\$1M SaaS Fee

\$1.6M consulting implementation over 1 year

\$320k PBT (20%)

Cash and profit aligned

SaaS+ financials: One deal example

Patience is required, but SaaS+ presents a strong NPV on a per-customer basis

Implementation expense is incurred up front, revenue earned over 4 years

Customer behavioural relationship is long, churn is low

99% over 30+ years

In year 2 and beyond, 40% ARR uplift will fall directly to the bottom line, boosting margin

Considered an investment, SaaS+ represents an IRR of 39% on conservative assumptions

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SaaS+ financials: One deal example

SaaS+ Financial Profile

\$1.0m

\$0.5m

(\$0.5m)

(\$1.0m)

(\$1.5m)

1

2

3

4

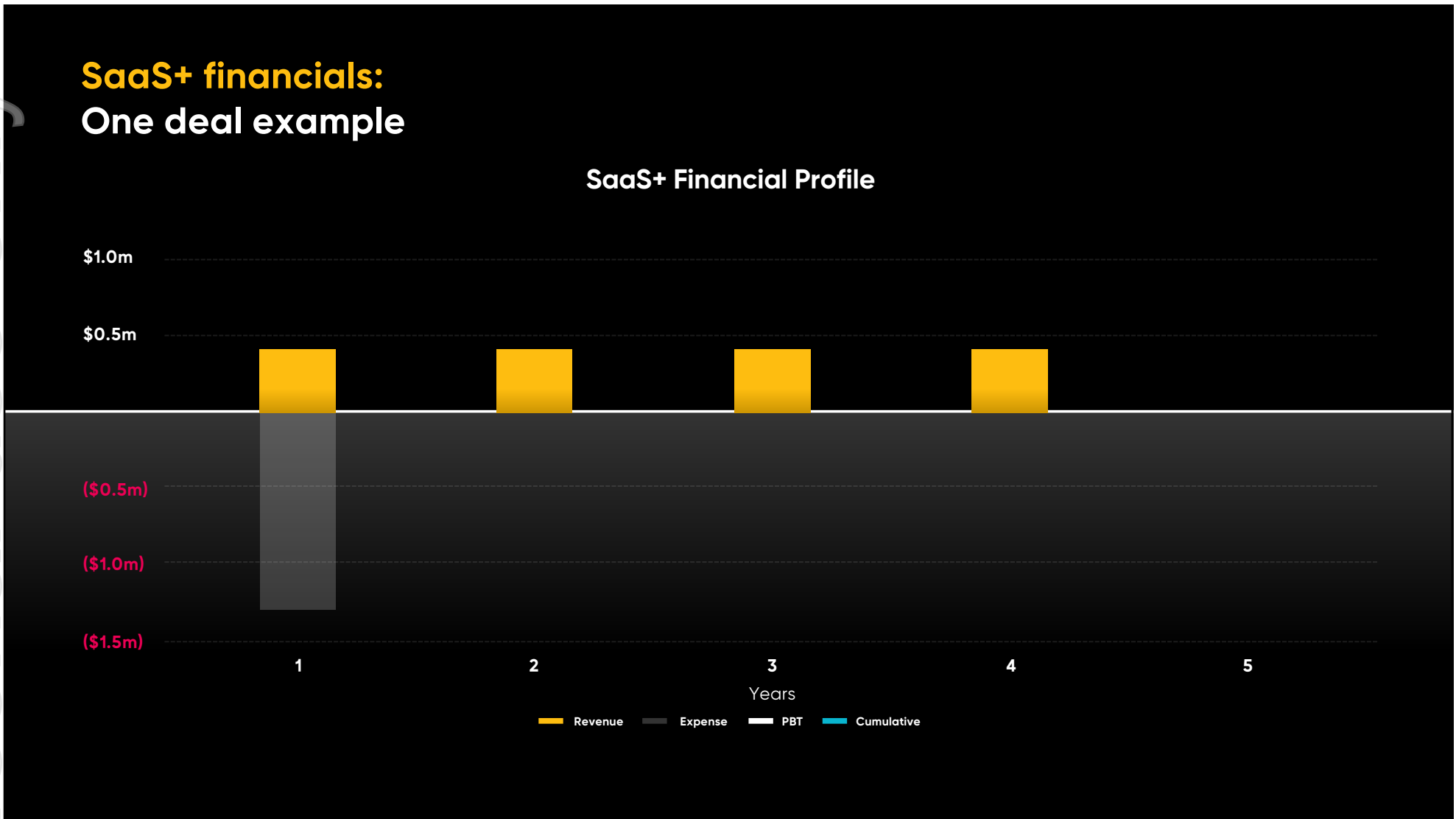
5

Years

Revenue Expense PBT Cumulative

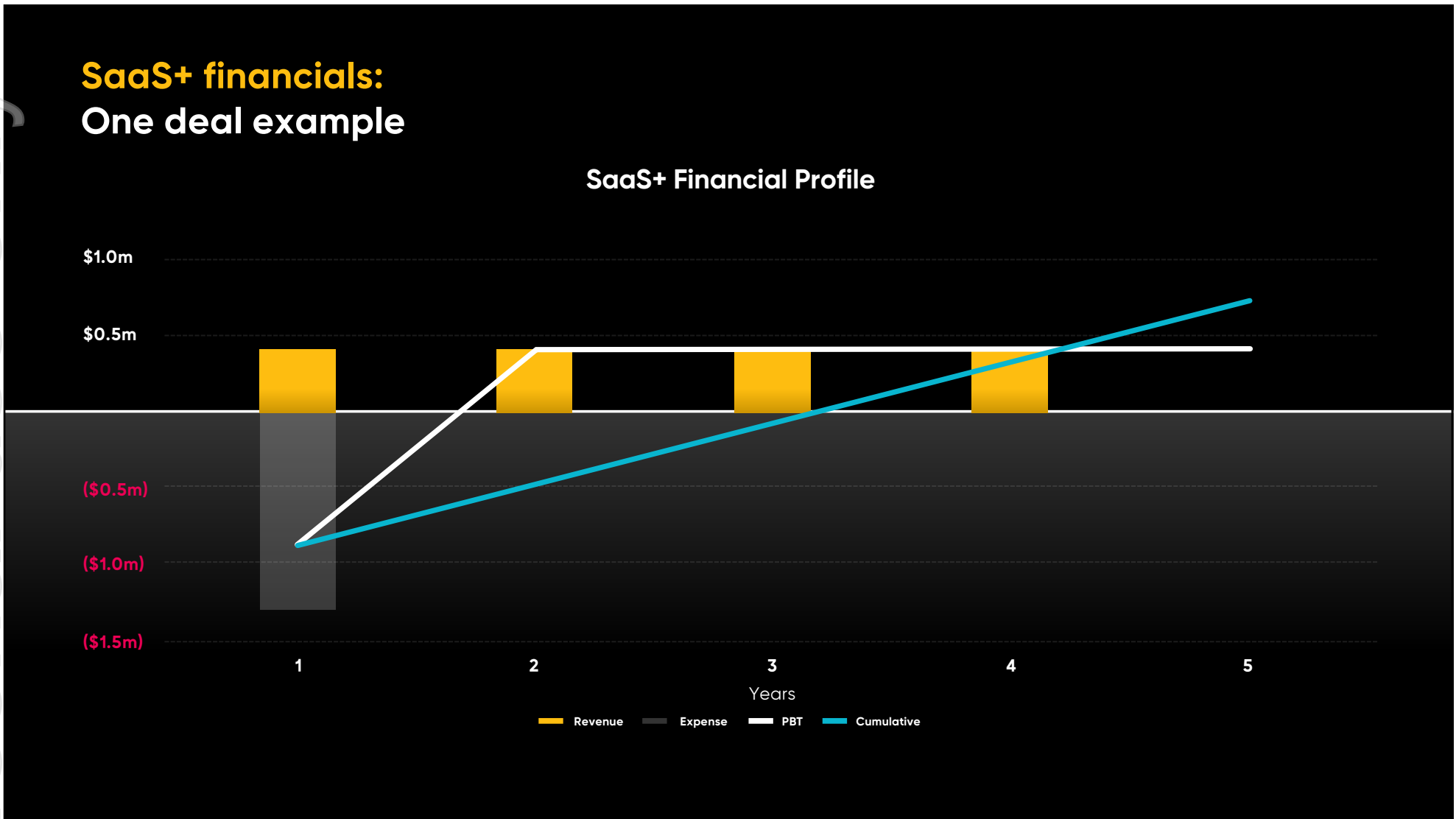
SaaS+ financials: One deal example

SaaS+ Financial Profile



SaaS+ financials: One deal example

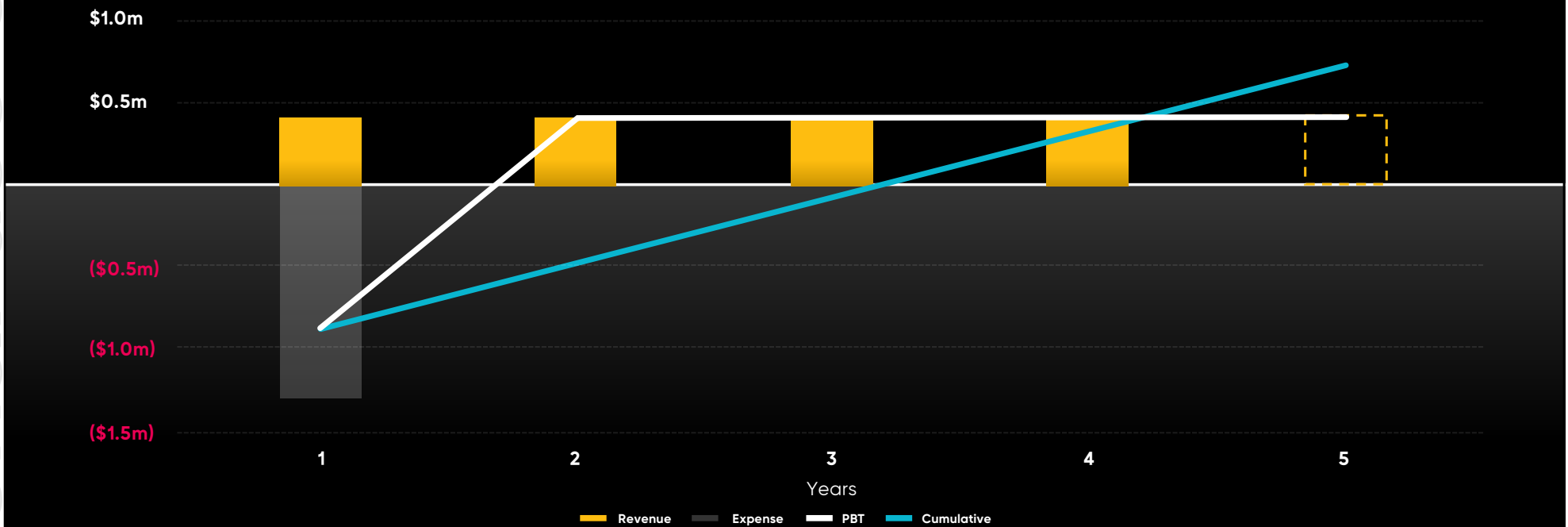
SaaS+ Financial Profile



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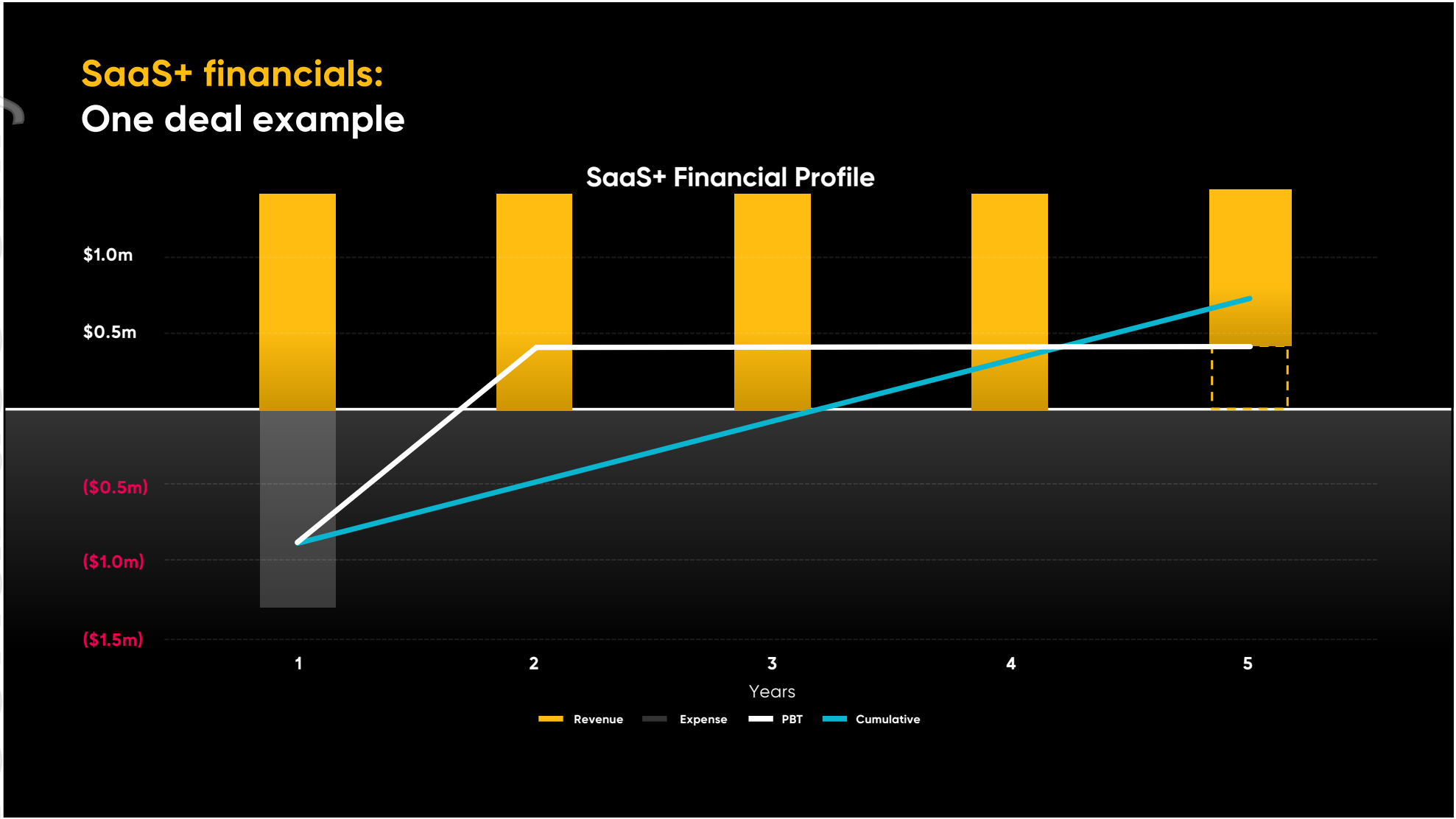
SaaS+ financials: One deal example

SaaS+ Financial Profile



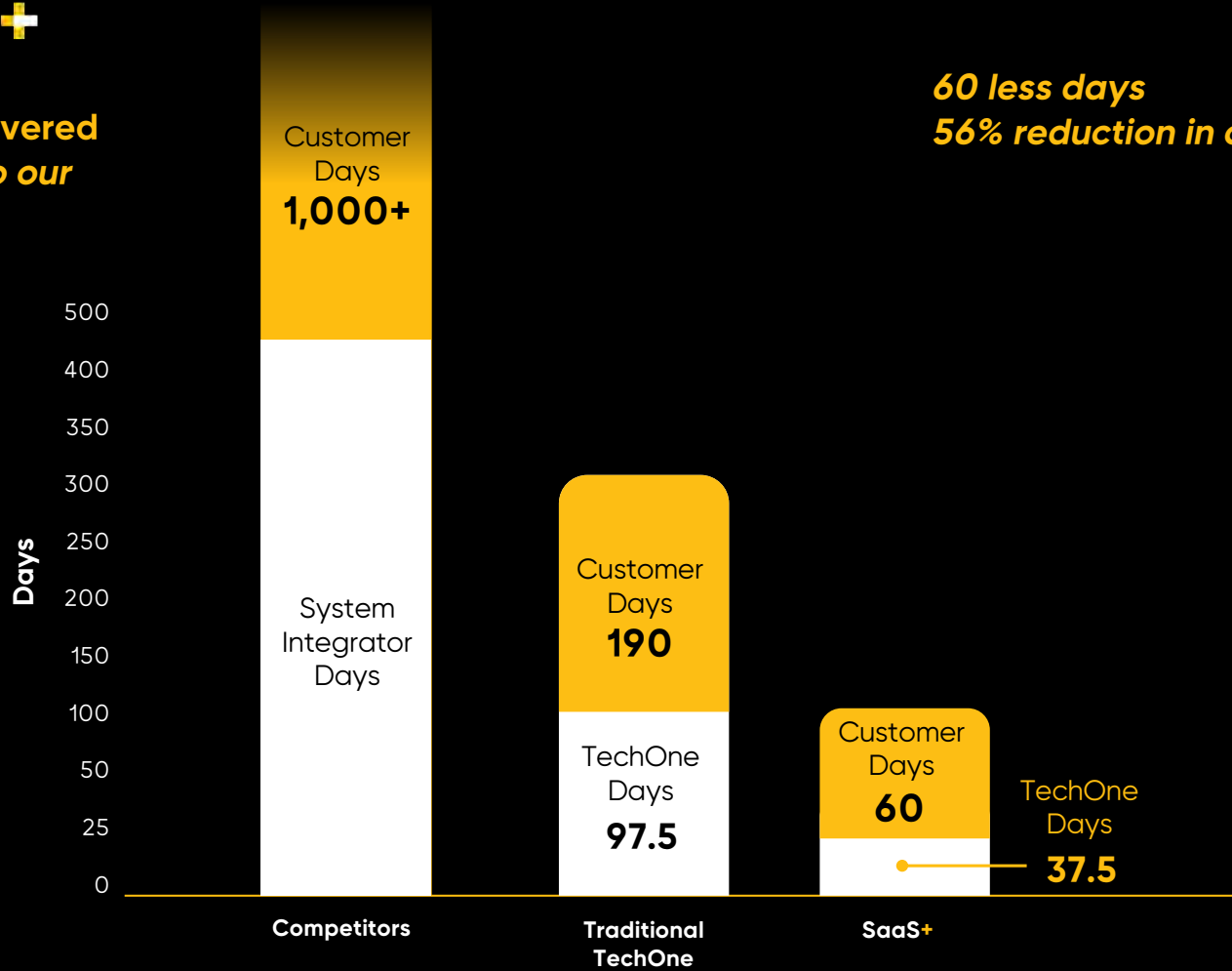
SaaS+ financials: One deal example

SaaS+ Financial Profile



SaaS+

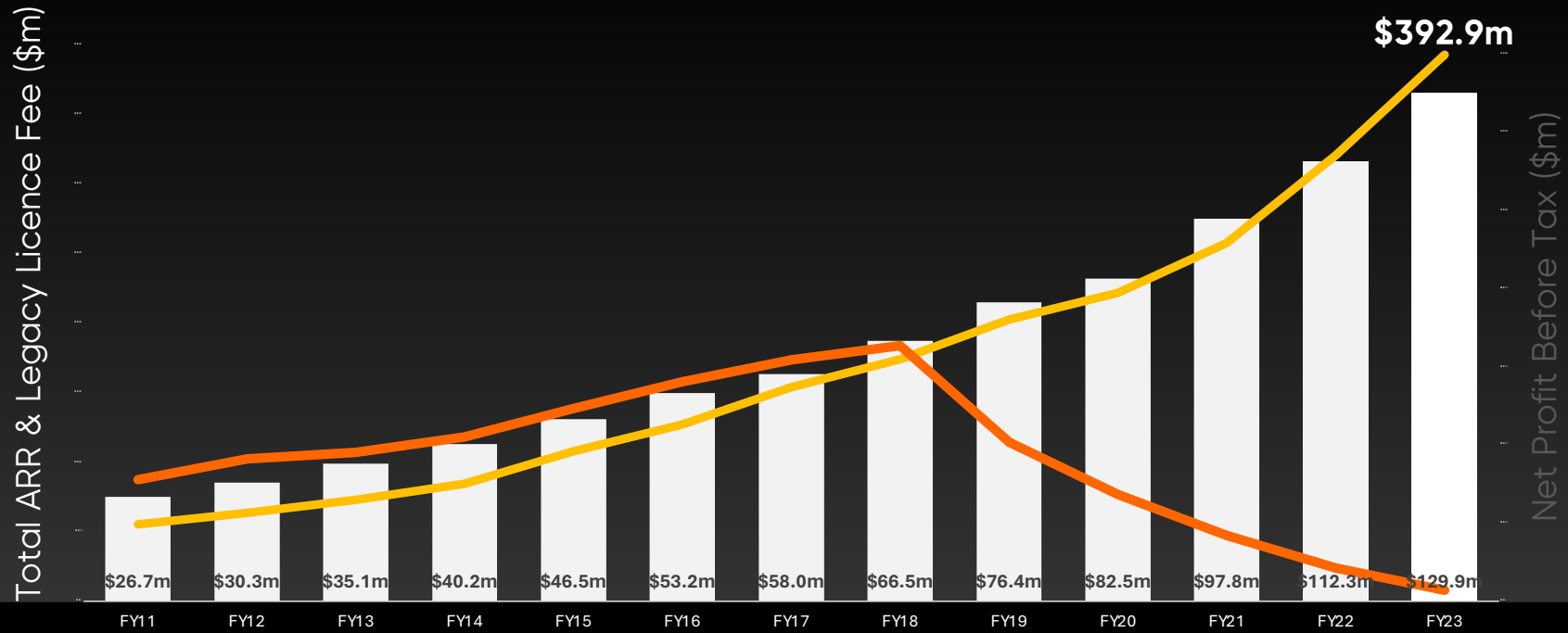
We have delivered **LESS** effort to our customers.



60 less days
56% reduction in customer effort

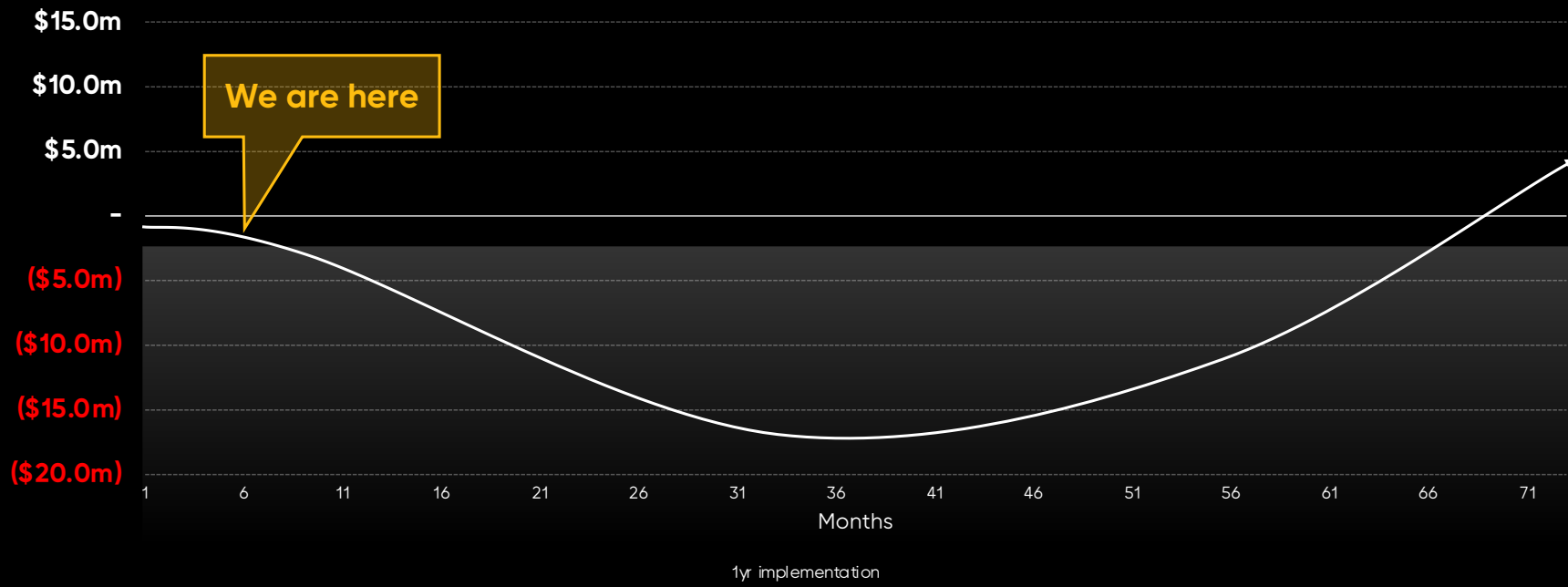
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Transition to SaaS - Careful reduction of legacy licence fees



SaaS+ financials: Portfolio PBT Impact

SaaS+ Cumulative PBT Impact



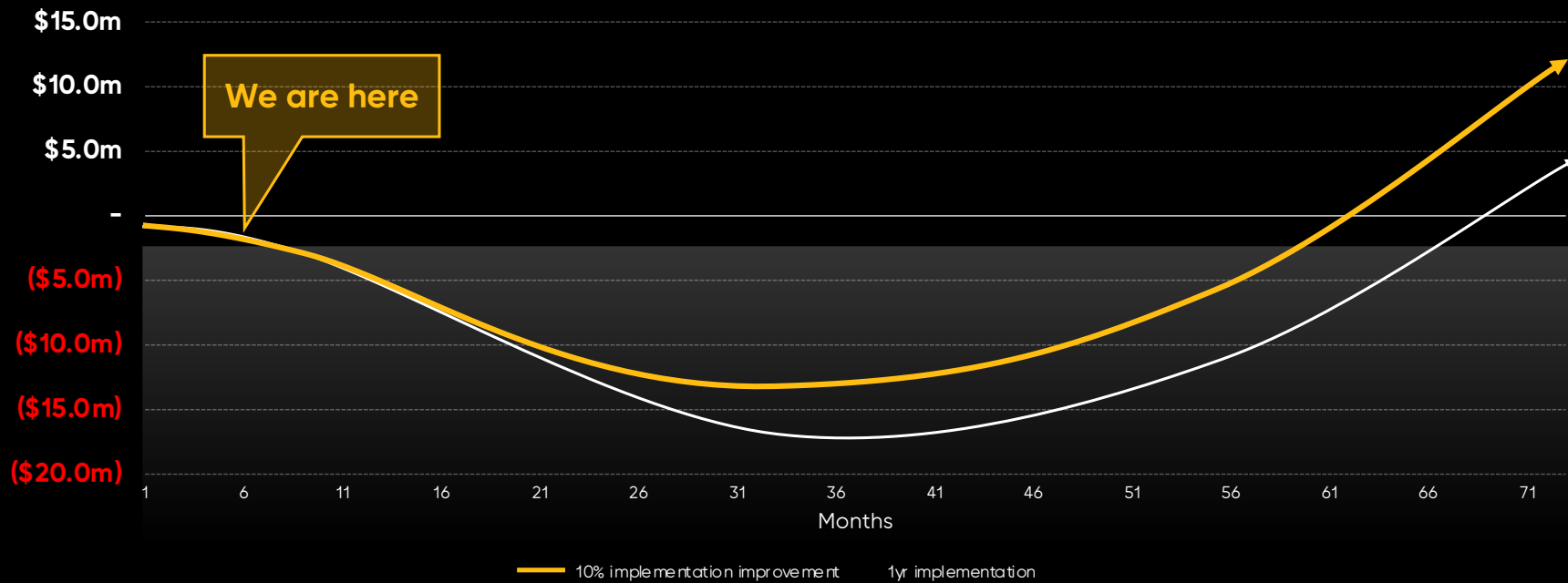
Illustrative base case example assumes:

- Monthly continuous even sales
- 1:1.6 ratio, \$1.4m SaaS+
- 1-year implementation period

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SaaS+ financials: Portfolio PBT Impact: Drive to ERP in 30 days

SaaS+ Cumulative PBT Impact

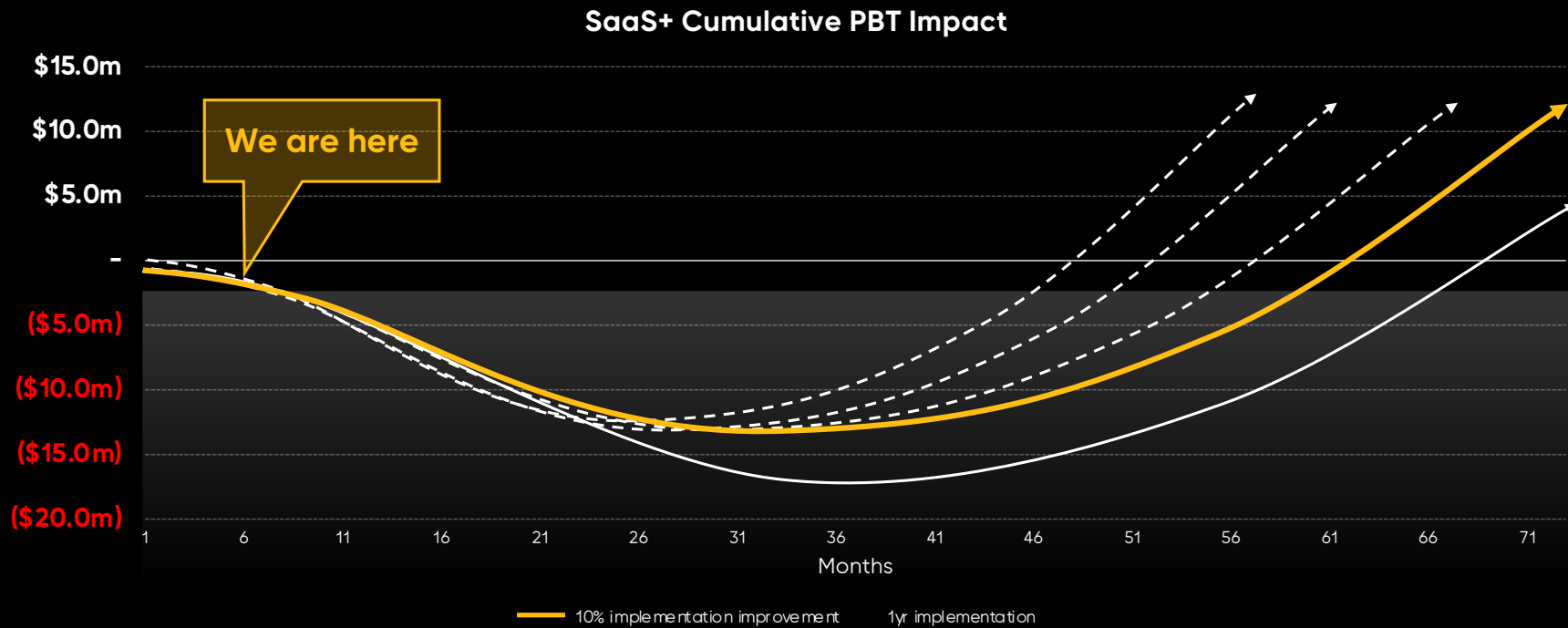


Illustrative base case example assumes:

- Monthly continuous even sales
- 1:1.6 ratio, \$1.4m SaaS+
- 1-year implementation period

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SaaS+ financials: Portfolio PBT Impact: Drive to ERP in 30 days



Illustrative base case example assumes:

- Monthly continuous even sales
- 1:1.6 ratio, \$1.4m SaaS+
- 1-year implementation period



SaaS+ financials: Conclusion

SaaS+ is a key pillar for TechOne's growth, creating a strategic moat

1

SaaS+ we are the only vendor who can do this in any market

2

Under SaaS+ the Technology One price book increases by 40% - effectively expanding TAM.

3

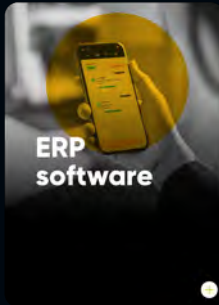
ERP implementation to 30 days

Agenda

9:30 - 10:00	Registration & Office Tours
10:00 - 10:30	What makes TechnologyOne unique
10:30 - 11:00	Light Refreshments Product Booths
11:00 - 11:30	What problem are we solving for our Customers
11:30 - 12:00	Demo How we solve problems for our Customers
12:00 - 12:30	Our total addressable market & SaaS+ intro
12:30 - 1:00	Deep dive into SaaS+ financials
1:00 - 1:45	Lunch & Product Booths
1:45 - 2:00	Summary
2:00 - 2:30	Q&A



 **technologyone**



**ERP
software**




**One
experience
for our
customers.**



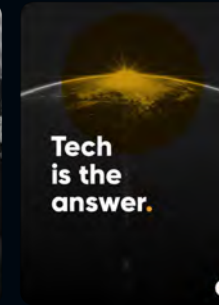
**Market
Focus &
Commitment.**



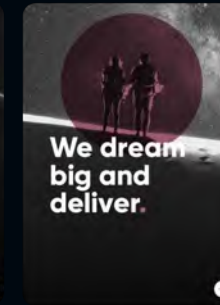
**Evolution not
revolution.**



**The Power
of One.**



**Tech
is the
answer.**



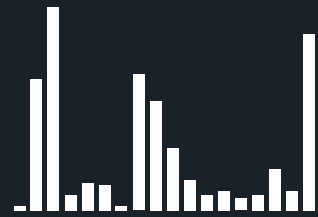
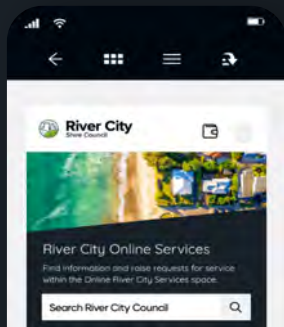
**We dream
big and
deliver.**

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technologyone

16 Products



\$13.5B

Total Addressable Market

SaaS+

\$1B+
ARR
BY
2030





 technologyone



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About this document

TechnologyOne's 2024 Investor Day gives attendees a look into the TechnologyOne product suite and strategic vision.

This brochure serves as your guide to TechnologyOne and our history, industries, products, competitors, and customers.

Discover why TechnologyOne continues to outperform industry benchmarks and why we continue our long history of doubling in size every five years.

It's an exciting time to be sharing TechnologyOne's growth journey.

Contents

About TechnologyOne 04

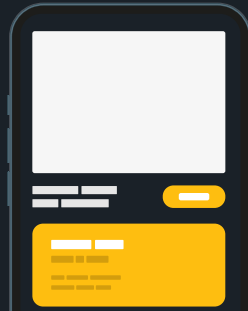
**Our Markets and
Preconfigured Solutions 14**

Our Products 27

Customer Story 58



16 products strategically focused over key industries.



Built on a code base that is set up for future innovation & is highly scalable.



Integrated GPS, Ai, Camera & Machine Learning functionality.

UX

One simple intuitive UX focused workplace for everything.



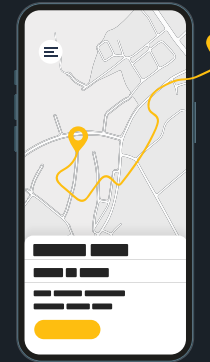
Two major software releases a year. We focus on customer evolution.



Best in class, global support providing customers with 24/7 assistance.



Highest level security accreditations in the industry.



dip

Simplicity, in the hands of your customers.



An all-inclusive offering specifically tailored for your industry.



500+ modules with over 10,000 capabilities.



App builder

Build an app faster without having to code.

cia live

We take care of the upgrade so you can focus on the future.

About TechnologyOne

Since our inception in 1987, TechnologyOne has been on a mission to better our community, from its citizens to students, by leveraging our team's innovation, drive, and determination.

TechnologyOne is Australia's largest enterprise Software as a Service (SaaS) company and one of Australia's top 100 ASX-listed companies. We provide a global Software as a Service Enterprise Resource Planning (SaaS ERP) solution that transforms business and makes life simple for our customers and the communities they serve. Our deeply integrated enterprise SaaS solution is available anywhere, anytime, on any device and is incredibly easy to use.

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Our History

Over 1,300 leading corporations, government agencies, local councils, and universities are powered by our software. For more than 36 years, we have been providing our customers with enterprise software that evolves and adapts to new and emerging technologies, allowing them to focus on their business and not technology.

Full year results 2023

UP 23%
**TOTAL
ARR
\$392.9M**

UP 15%
Dividend of
19.52cps

**UP
28%**
\$306.0M
Net assets

**14
YEARS**
Continued
record profit

\$112.0M
R&D investment
up 21%
(25% of revenue)

UP 19%
\$426.4M revenue from
SaaS & continuing
business

**UP
54%**
UK profit \$3.7M

**UP
19%**
Total revenue
\$441.4m

30% Profit
Before Tax
margin

**UP
16%** \$129.9M
Profit
Before Tax

**UP
13%** \$198.3M
Cash and
cash equivalents

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Our vision. As the only company offering a true global Software as a Service (SaaS) ERP solution across the entire enterprise, we are making life simple for our community.

Our Difference

We are the only vendor that develops, sells, implements, supports, and runs a fully integrated suite of enterprise software solutions. Our global SaaS ERP solution spans across the entire enterprise and allows our customers to embrace the digital revolution and an exciting new world of possibilities in a cloud-first, mobile-first world.

Our Reach

TechnologyOne has a global presence throughout Australia, New Zealand, Asia, and the United Kingdom.

Our Culture

At TechnologyOne, we believe in a culture of innovation, creativity, and collaboration, and have created an environment that allows our people to thrive. This culture is built into the fabric of our business, driving high performance, and underpinning our success. Our global team is made up of more than 1,200 passionate

individuals. We believe in investing in our people, and we do this with a wide range of initiatives such as O Week, One Talks, MARVEL awards, and leadership courses.

Compelling Customer Experience

We continue to recognize that our customers are our true north for the decisions we make, the people we employ and the processes we create. This is why we continue to invest in our Compelling Customer Experience (CCE) program, which provides our people with ongoing development and support in delivering outstanding customer experiences. The program supports and encourages our team members so that they can deliver outstanding customer service every day. Providing a compelling customer experience is fundamental to the way TechnologyOne does business and positions us well to attract customers away from our competitors.

Our Market-Leading Solutions and Products

As the leading supplier of enterprise software solutions for more than 1,300 large-scale companies, and with more than 36 years' success in the business, we have developed a deep understanding of our key markets. We offer our customers a range of industry-leading preconfigured enterprise solutions. Our solutions streamline implementations, reducing time, cost, and risk for customers. We also offer a comprehensive suite of enterprise software products.

Our Markets

- Local Government
- Education
- Government
- Health and Community Services
- Asset and Project Intensive
- Corporates and Financial Services

Our Preconfigured Solutions

- OneCouncil
- OneEducation
- OneGovernment
- OneCare
- OneAsset
- OneCorporate

Our Products

- Corporate Performance Management
- Enterprise Content Management
- Human Resources & Payroll
- Spatial
- Supply Chain Management
- Strategic Asset Management
- Enterprise Cash Receipting
- Enterprise Asset Management
- Financials
- Property & Rating
- Student Management
- Business Analytics
- Enterprise Budgeting
- Performance Planning
- Timetabling & Scheduling
- DXP Local Government

TechnologyOne is at the very forefront of delivering the benefits of mass production to the enterprise software industry. As we have seen in other industries, the economies of scale of mass production will change the face of the software industry.

Realising our vision as a SaaS-first company

Over ten years ago, we started our journey to SaaS, by committing to building a software solution that would operate anywhere, any time, on any device. We set an aspirational goal to develop the next generation of ERP software, to transform our customers through a digital platform. Today, that solution is CiA, delivered via SaaS.

Over the last six years, our customers have validated this strategy with the overwhelming adoption of SaaS. Transitioning to SaaS has allowed them to become more agile and more importantly, gives them the ability to focus on their customers and not on their technology.

We now know that SaaS is the future, and the only way

to provide our customers with the experience they need to succeed.

That's why we've transitioned the majority of our on-premise customers to our SaaS platform, providing them with a digital platform for evolution.

We have committed to moving all remaining on-premise customers to SaaS by 2024 and will work closely with our on-premise customers on their pathway to SaaS to ensure no customer is left behind.

This shift will not only allow us to realise our vision as a full SaaS company but will enable us to better focus our resources on developing and delivering our products, new enhancements, and innovations on a single platform.

Any device, anywhere, at any time

Our award-winning CiA platform delivers a single solution for our key verticals, that enables possibilities now and in the future. CiA is the path forward for our customers and provides a springboard for future innovations.

Through CiA, customers gain access to the full functionality of our enterprise software on any device, anywhere, at any time.

Organisations can embrace iPad, iPhone and Android devices as part of their enterprise solution and our adaptive screen design guarantees a great user experience regardless of the device. Because the experience is tied to the user, not the device, an employee can move seamlessly from

one device to another without interrupting their work. The hybrid working model validates CiA's any device, anywhere, anytime capability and enables the functionality that hybrid working demands and employees have come to expect. With its incredibly simple design, CiA has created a new standard in enterprise software, giving us a significant competitive advantage. For customers undertaking digital transformations, this is the key to future success.

Most trusted SaaS ERP provider

We take the privacy and security of our customers' data very seriously and weave this consideration into the fabric of everything we do. We are committed to building the world's most

trusted SaaS platform for enterprise software and will continue to make significant investments to that end. That's why, since 2017, we have achieved the highest-level security accreditation of any SaaS ERP vendor operating in Australia.

The foundation of our global SaaS ERP solution is a class-leading security and compliance program designed to give our customers the strongest protection and privacy. As part of this program, we develop and maintain our security framework, which passes the most stringent external verification, testing and scrutiny.

Customers receive the benefit of these certifications, along with ongoing security and privacy enhancements, at no extra charge.

Taking SaaS to the next level

It's SaaS, but better. All our customers' ERP needs are in one place with Solution as a Service (SaaS Plus). We are leveraging our unique domain experience of over 36 years and our unwavering commitment to our industries by taking complete responsibility to deliver outcomes with our best-in-class SaaS ERP.

With SaaS Plus, TechnologyOne takes full responsibility for the complete outcome of the solution experience, not just the software – removing the need for traditional long, complex, risky and expensive implementations.

Our all-inclusive offering is specifically tailored for the industries we serve, delivering industry specific software solutions.

Harnessing TechnologyOne's unique 'Power of One', SaaS Plus offers end to end software implementation quickly, securely, and efficiently. Ensuring there is minimal risk for our customers.

This innovation sets a new industry benchmark and redefines the relationship between technology providers and customers, removing the need for expensive third-party consulting practices and complex implementations. SaaS Plus will change the world of ERP solutions and move us forward into the future.

SaaS+

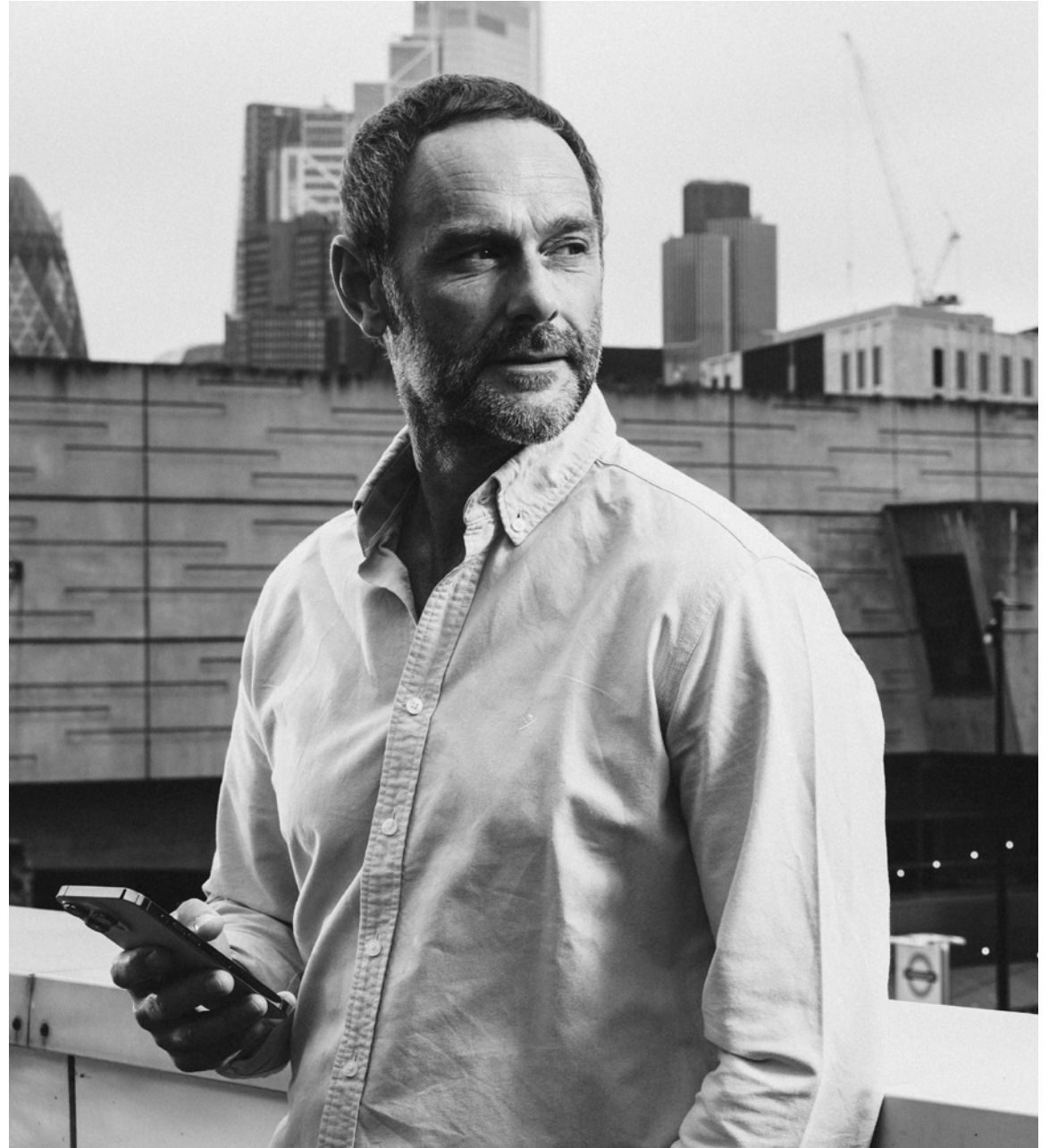
n. *noun. /sæs Plus/*

Delivering an end to end solution built with the customer in mind so they can focus on the communities they serve (the abbreviation for 'solution as a service')

With SaaS Plus, TechnologyOne takes full responsibility for the solution experience – reducing risk and saving time and money for our customers. **One plan, one price, one point of call.**

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Financial highlights



	2023 \$'000s	2022 \$'000s	Growth on last year	15-year compound growth	2021 \$'000s	2020 \$'000s	2019 \$'000s Comparable	2018** \$'000s	2017 \$'000s	2016 \$'000s	2015 \$'000s	2014 \$'000s
Revenue - SaaS and Continuing Business	426,379	358,668	19%	-	293,553	269,774	241,790	221,046	231,151	192,657	175,279	140,024
Total revenue	441,363	369,391	19%	10%	312,012	299,018	286,164	254,491	273,253	249,018	218,724	195,124
Annual Recurring revenue (ARR) ¹	392,884	320,694	23%	-	257,495	221,908	202,480	173,912	153,896	126,996	108,853	-
R&D Investment	111,995	92,197	21%	12%	77,005	68,062	60,124	54,042	49,856	46,009	41,038	37,873
Net Profit Before Tax	129,854	112,320	16%	12%	97,843	82,470	76,389	50,807	58,019	53,240	46,494	40,235
Net Profit After Tax	102,876	88,843	16%	13%	72,691	62,945	58,459	47,681	44,494	41,344	35,785	30,967
Earnings Per Share (Cents)	31.71	27.51	15%	12%	22.64	19.75	18.43	15.10	14.18	13.26	11.57	10.06
Total Dividends (cents per share)	19.52	17.02	15%	11%	13.91	12.88	11.93	11.02	10.20	9.45	8.78	8.16
Dividend Payout ratio	62%	62%	-	-	62%	65%	65%	73%	72%	72%	76%	81%
Cash, Cash equivalents and short-term Investments	223,265	175,865	27%	16%	144,210	125,244	105,046	104,322	93,383	82,588	75,536	80,209
Net Assets	306,006	239,097	28%	13%	190,234	142,168	106,857	103,480	157,520	138,494	117,940	104,499

The table shows previously reported results to FY17. Results for those years have not been restated for AASB15.

*Before capitalisation.

**2018 Comparable applies AASB15. It also assumes non-IFRS pro forma capitalisation of R&D costs (50%) for the FY18 year and is unaudited. As a SaaS company, R&D costs are capitalised from FY19 onwards, which is the common practice of our SaaS peers. We measure our performance using the comparable method because it is a better reflection of the performance of our business, setting a higher bar for the prior comparable period (FY18) than the statutory reporting. It allows for a 'like for like' comparison of the performance of the business, assuming R&D costs (50%) were capitalised in FY18. This is the basis used for all comparable reporting throughout this document.

¹ARR is not an IFRS measure and is unaudited, it represents future contracted annual revenue at year end.

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Foundation

unite | donate | participate



The TechnologyOne Foundation is dedicated to making a difference to disadvantaged children and families in our communities by empowering them to transform their lives and create their own pathways to success.

The Foundation was established in 2016 to ensure that charitable giving would become a long-term initiative for the business and encourage philanthropy to become part of the company culture. Our Foundation helps great Australians achieve great things and we are committed to long term contributions to our key partners.

More than \$2m global pledge for FY24.
Our goal is to lift 500,000 children and their families out of poverty

The Year in Summary

\$856,849

Profit contributed to the TechnologyOne Foundation to give back to our communities

\$442,265

Worth of product discounts to NFPs

5,341 hours

Of volunteering, equating to

\$41,371

Raised by team members (employee generated)

Delivered

in house education programs for The Salvation Army Independent School

85

Charitable events supported worldwide

900

Solar Buddies built

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Our Markets and Preconfigured Solutions



Key facts

Delivering integrated, pre-configured solutions to our key markets reducing time, cost, and risk.

- Specialise in six vertical markets, building deep industry knowledge and developing solutions that meet customer needs
- Vertical alignment of our marketing, sales, product, and consulting teams showcasing in-house expertise
- Working closely with our customers to ensure we understand their needs, meet their priorities, drive continuous improvement, and provide an increasing range of functions

Deepest functionality for the markets we serve

As the leading supplier of enterprise software solutions for more than 1,300 large-scale companies, and with more than 36 years' success in the business, we have developed a deep understanding of our key markets. We offer our customers a range of industry-leading preconfigured enterprise solutions. Our solutions streamline implementations, reducing time, cost, and risk for customers. We also offer a comprehensive suite of enterprise software products.

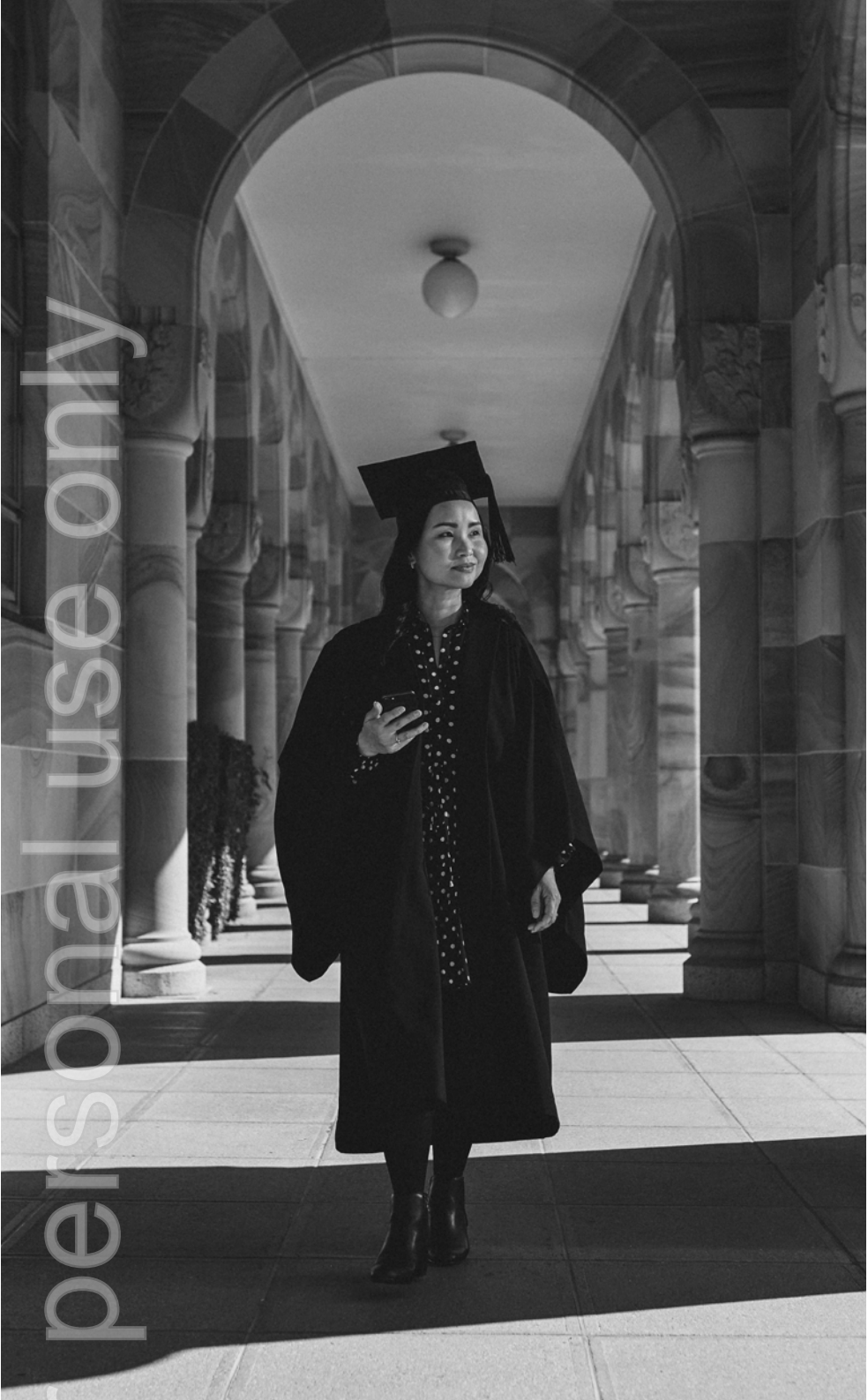
We are the only vendor that develops, sells, implements, supports, and runs a fully integrated suite of enterprise software solutions. Our global SaaS ERP solution spans across the entire enterprise and allows our customers to embrace the digital revolution and an exciting new world of possibilities in a mobile-first world.

OneEducation

Enterprise software for educational institutions.

**Empowering over 6.5 million students globally,
and mobilising over 60 per cent of higher
education in Australia and New Zealand.**

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Key facts

Supporting day-to-day operational, strategic and educational requirements of higher education, vocational education and training in a single, integrated solution.

Products

- Business Analytics
- Contact Management
- Enterprise Budgeting
- Enterprise Cash Receipting
- Financials
- HR and Payroll
- Supply Chain Management
- Student Management
- Timetable and Scheduling

Key Competitors

- Tribal
- Ellucian
- Oracle Peoplesoft
- Callista
- SAP
- Workday
- ReadyTech
- Time Edit
- JDR Software
- Microsoft Dynamics 365
- Salesforce

Existing customers

500+ institutions

OneEducation TAM

TOTAL

2,639m

OneCouncil

Enterprise software for local government

**73% of Australian and New Zealand residents
live in a council powered by TechnologyOne**

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Key facts

Our powerful SaaS ERP software supports the day-to-day operations of councils and strategic requirements of local governments in Australia and New Zealand with a single, integrated solution.

Products

- Contract Management
- Enterprise Asset Management
- Enterprise Budgeting
- Financials
- HR and Payroll
- Property and Rating
- Supply Chain Management

Key

- Oracle
- SAP
- Unit4
- Centros
- Civica
- Infor
- NEC
- Infor/Total Mobile
- ReadyTech
- Microsoft
- Advanced
- MHR/Zellis
- Datacom
- Salesforce
- Capita Integra/
- Workday

Existing customers

340+

OneCouncil TAM

TOTAL

3,253m

OneGovernment

Enterprise software for Australian state and federal government.

**Trusted by 1 in 4 public sector organisations
across Australia and New Zealand.**

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Key facts

Empowering seamless service delivery to enhance the lives of citizens, our SaaS ERP software supports the day-to-day operations and strategic requirements of State, Federal, and Central governments, increasing time to value.

Products

- Contract Management
 - Enterprise Asset management
 - Financials
 - HR & Payroll
 - Property and Rating
-

Key Competitors

- SAP
 - Oracle
 - Microsoft Dynamics
 - Work Day
-

Existing customers

235+

OneGovernment TAM

TOTAL

3,029m

OneCare

Enterprise software for health and community services.

**Empowering over 150 health and community
organisations**

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Key facts

Our enterprise approach enables care providers, hospitals, and community organisations to reduce operating costs and wastage, accurately bill and manage debtors, maximise theatre usage, and manage compliance through improved visibility, accuracy, and efficiency.

Products

- Corporate Performance Management
- DXP
- Enterprise Receipting
- Financials
- HR and Payroll
- Supply Chain Management

Key Competitors

- LeeCare
- Butterfly Systems
- H-Trak
- Workday
- Humanforce
- Sage
- SAP
- DXC
- Dynamics
- Netsuite
- Oracle
- Epicor

Existing customers

160+

OneCare TAM

TOTAL

1,642m

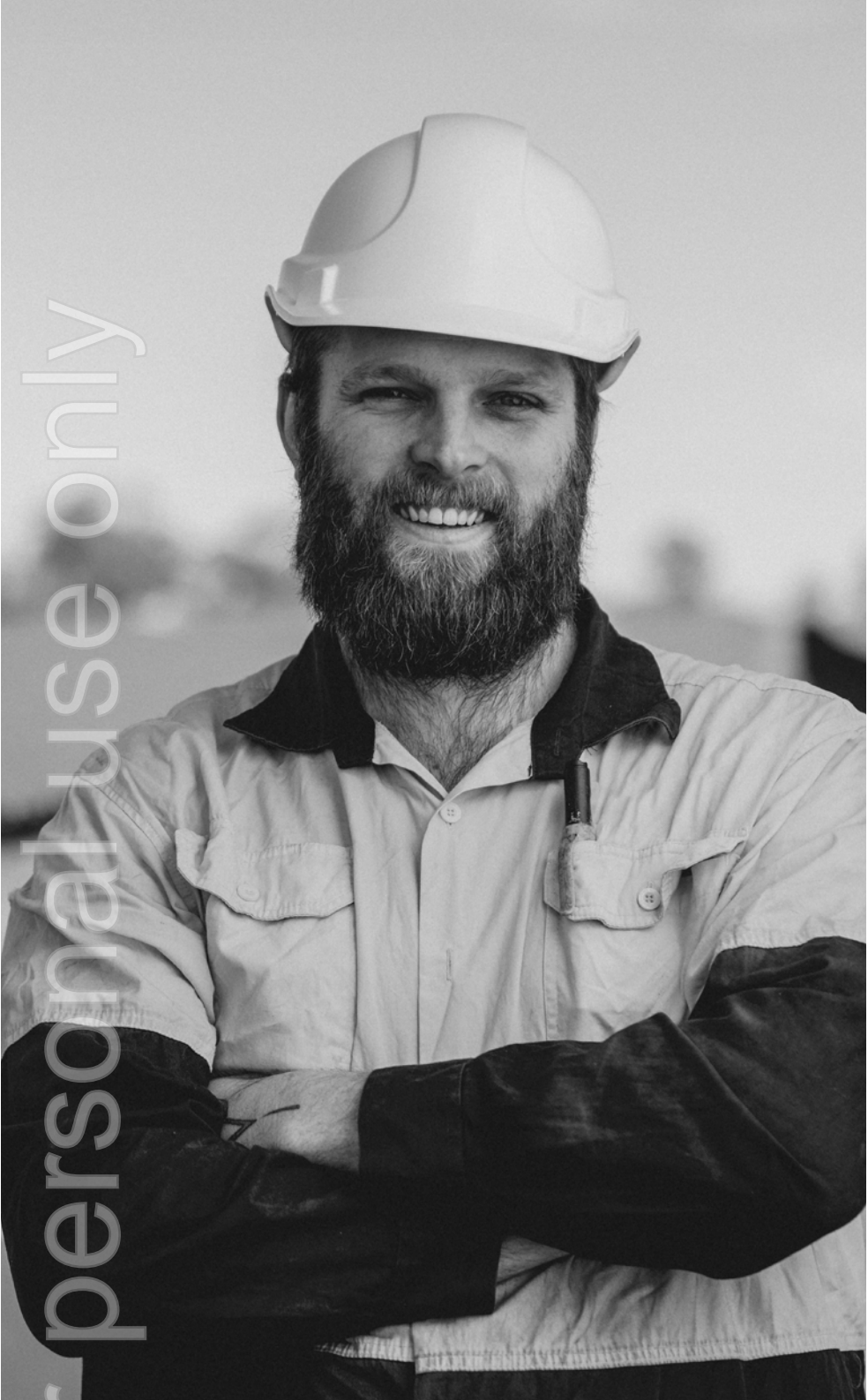
OneAsset

Enterprise software for Asset and project services

**Managing over \$300 billion worth of
assets and infrastructure**

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personal use only



Key facts

Offering improved reliability, availability, and scalability for the asset and project intensive industries, our OneAsset SaaS ERP solution provides the capabilities needed to manage all asset and project lifecycles from ideation to closure and retirement.

Products

- Corporate Performance Management
- DXP
- Enterprise Receipting
- Financials
- HR and Payroll
- Supply Chain Management

Key Competitors

- Microsoft
- Infor
- Procure
- Jobpac
- JD Edwards
- IFS
- COINS

Existing customers

120+

OneAsset TAM

TOTAL

2,980m

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Our Products



Key facts

Simplicity, not complexity

As a leader in the ERP market, we have always focused on transforming business. More importantly, we do this to remove complexity and make life simple for our customers.

- 16 products strategically focused on key industries
- One simple intuitive UX focused workplace for everything
- Integrated GPS, Ai, Camera & Machine Learning functionality

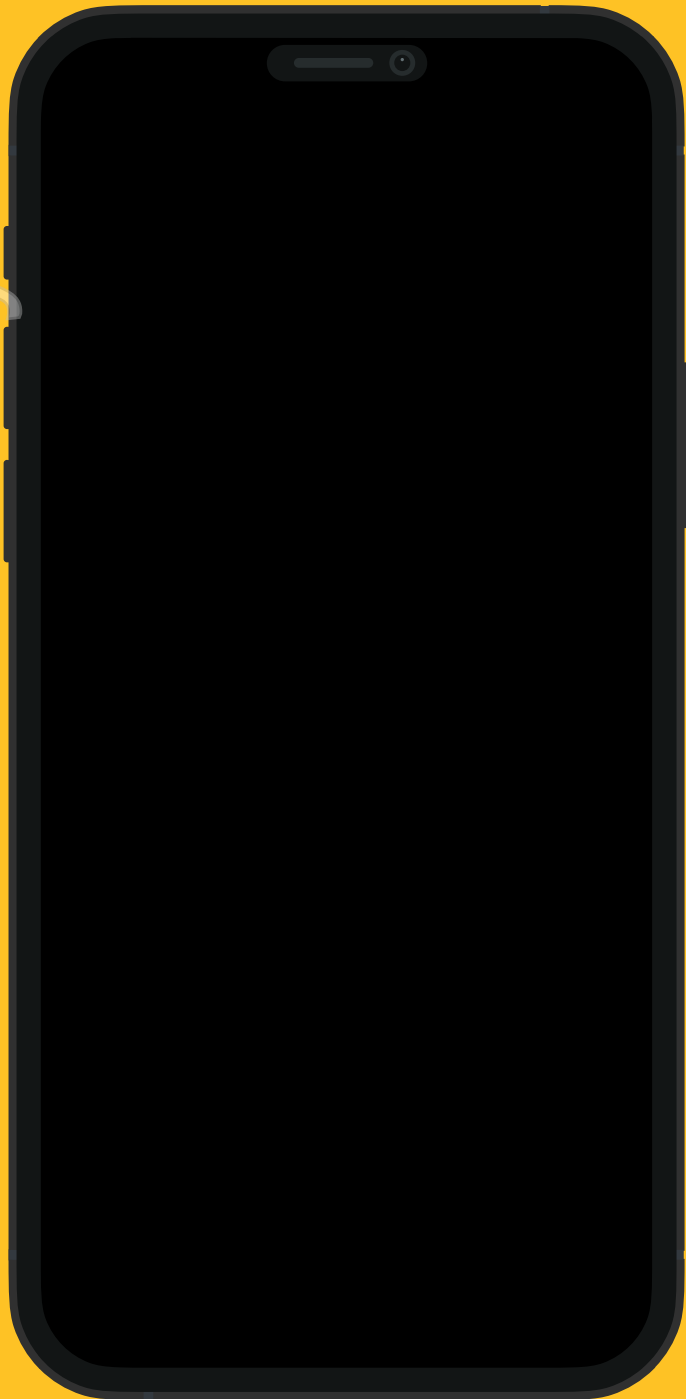
With innovation ingrained in our DNA, we embrace our new technology and constantly invest in research and development to improve the customer experience.

Our goal is to deliver enterprise software that's incredibly simple to use. That's why, we are focused on enhancing our product capabilities and ensuring we meet industry standards to create a seamless experience for our customers.

Business Analytics

**Access to real-time insight
that can be easily shared
with all stakeholders.**

**Empower your teams to analyse and drill-down on information to
take action quickly.**



Key facts

Drive your organisation forward by managing budgeting, forecasting, planning and performance in one simple tool

Key Competitors

- Microsoft Power Bi
- Microsoft Fabric
- Tableau
- Qlik
- Google Looker
- Domo
- Sisense

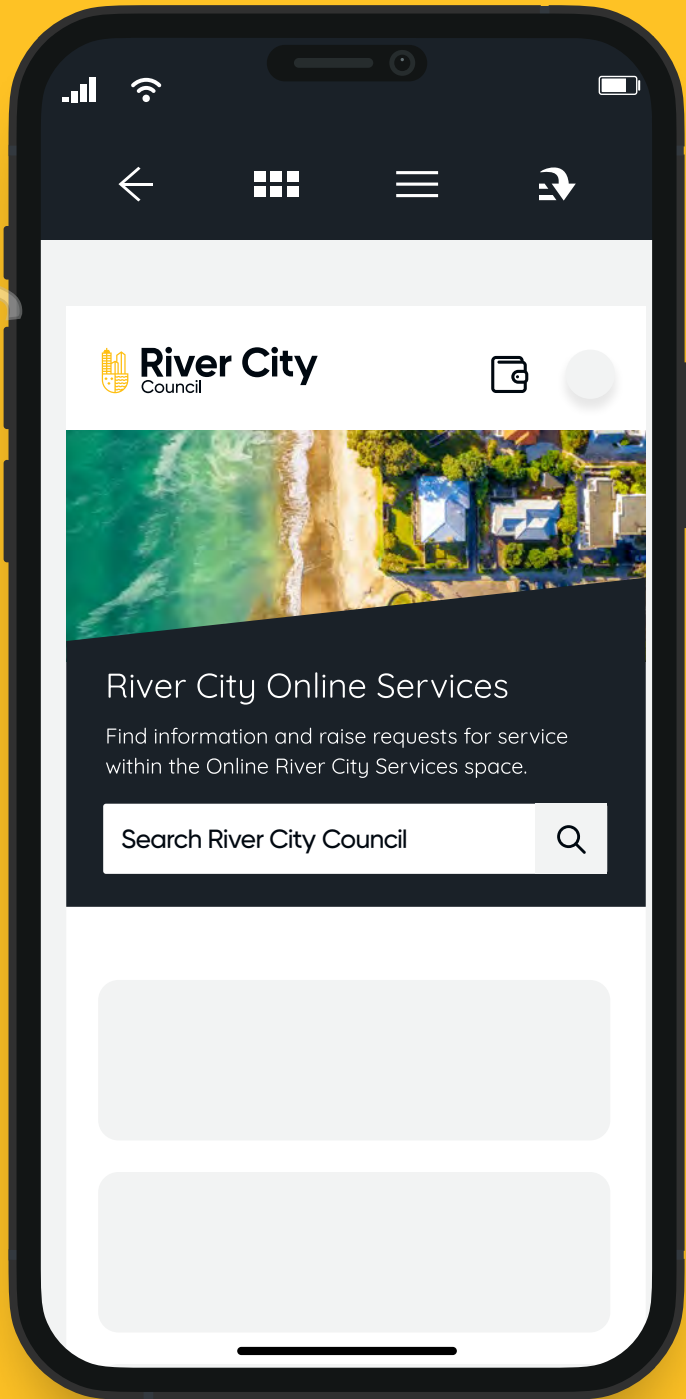
Business Analytics TAM

LG	EDU	GOV	AI	HCS	TOTAL
661m	519m	777m	797m	422M	3,175m

DxP Local Government

**Reimagine your future
with our simple, intuitive
interface that offers your
community a streamlined
customer-centric
experience.**

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Key facts

Reinvent the customer journey with a simple interface that takes the guess work out of customer service and experience the true power of an interconnected system with a centralised location for name records, content, and more.

Key Competitors

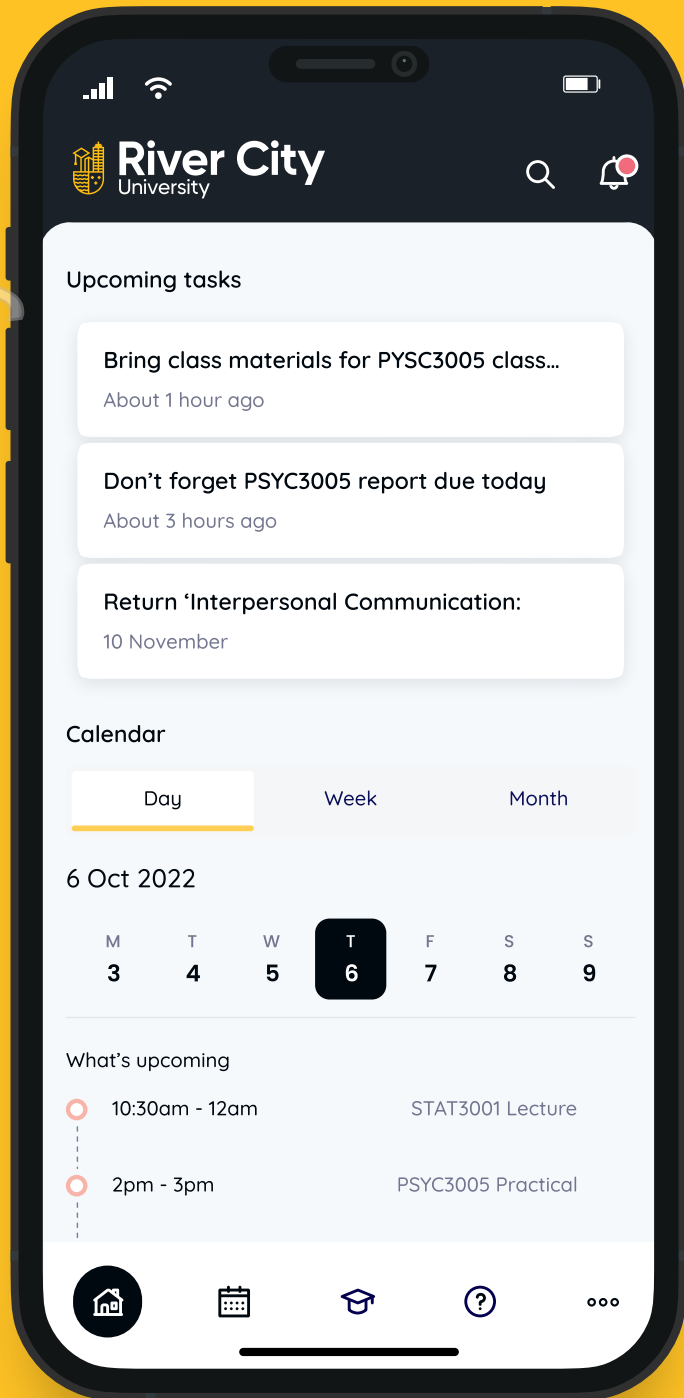
- Salesforce
- Oracle
- DataCom (New Zealand)
- Granicus (OpenCities & Bang the Table)
- Live Pro
- Various 'Home Grown' solutions

DxP Local Government TAM

LG	EDU	GOV	AI	HCS	TOTAL
443m	-	-	-	-	443m

DxP Student

Drive student success by simplifying and automating administration with an engaging interface that brings together data from disparate systems.



Key facts

Help keep students on track by utilising data analytics to identify when students are struggling and direct them to the right support and services with Student DXP.

Key Competitors

- Salesforce
- Oracle
- DataCom (New Zealand)
- Granicus (OpenCities & Bang the Table)
- Live Pro
- Various 'Home Grown' solutions

DxP Student TAM

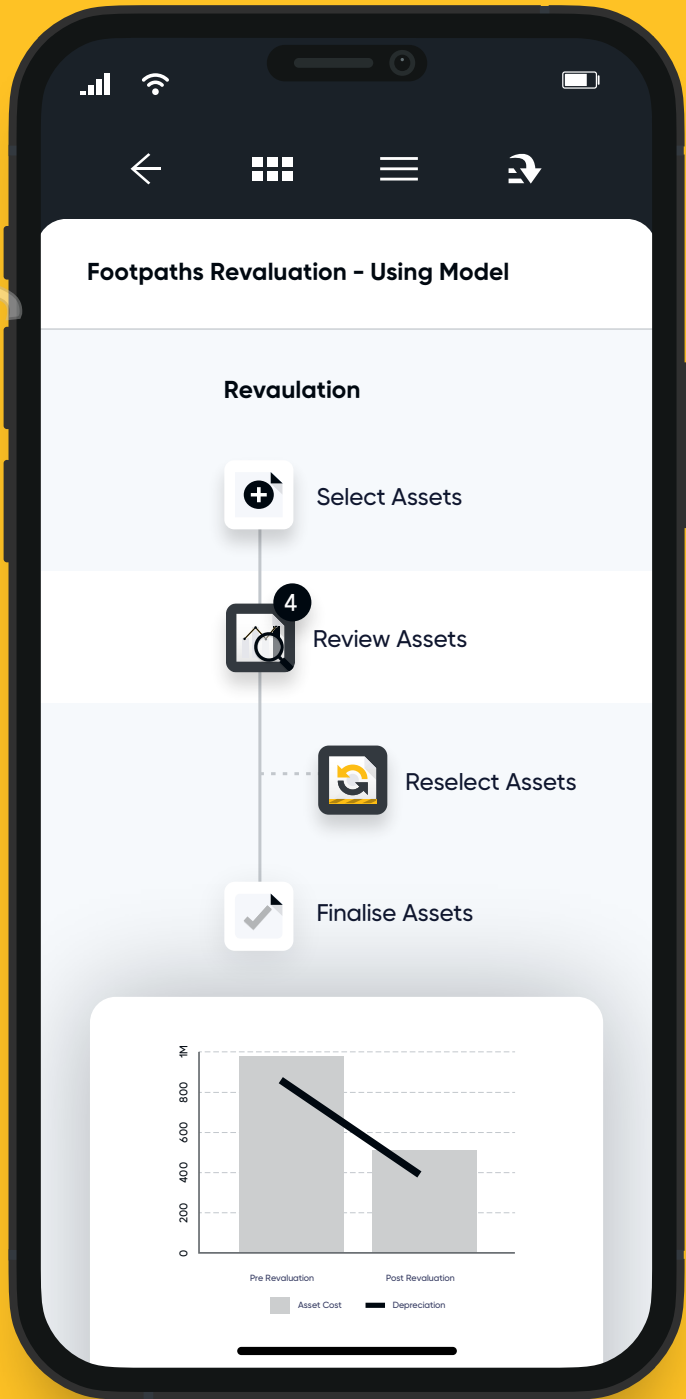
LG	EDU	GOV	AI	HCS	TOTAL
-	654m	-	-	-	654m

Enterprise Asset Management

Optimise your assets with an integrated asset management solution

**Maximise performance across the asset lifecycle to unlock
efficiency and meet your organisation's goals**

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Key facts

A comprehensive and integrated approach to asset management providing you with full visibility into the cost and performance of every asset, helping you to make evidence-based asset investment decisions

Key Competitors

- Assetic (Brightly Software)
- SPM Assets
- Copperleaf
- Asset Vision
- Civia Authority
- Civa
- SAP
- Oracle
- Maximo
- MEX
- Confirm
- Archibus
- Conquest
- Pulse Project Solutions
- PojX Synergy
- PojX360
- Authority Actus
- Authority Asset Management App
- Asset Edge – Reflect
- Fulcrum
- iAuditor
- Maximo Everywhere
- Aten Systems.

Enterprise Asset Management TAM

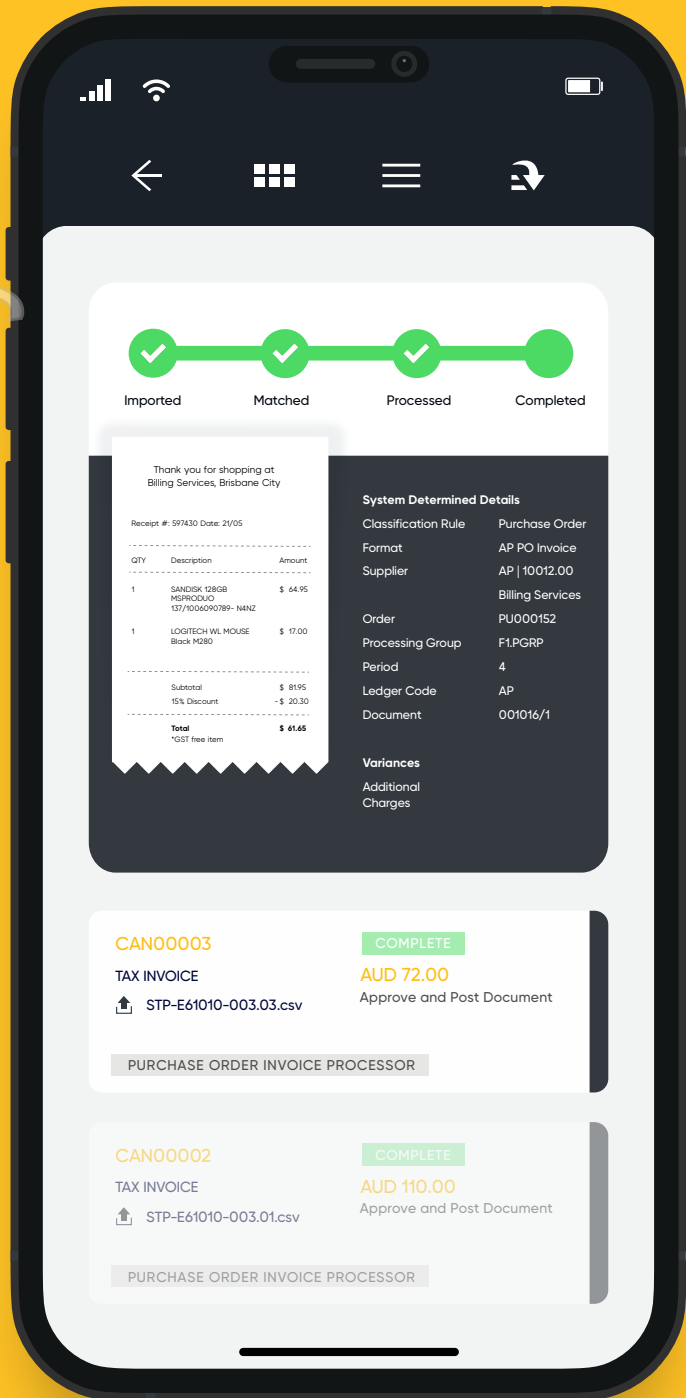
LG	EDU	GOV	AI	HCS	TOTAL
542m	195m	406m	397m	155m	1,694m

Enterprise Cash Receipting

**Keep all your payments in
one place with Enterprise
Cash Receipting**

**Minimise transaction processing times and get a clear revenue
picture for your business**

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Key facts

A single cash receipting solution that transparently receipts payments from multiple systems, in a single transaction. Define how the receipting process is managed and scalability to suit businesses of any size.

Key Competitors

- Civica
- Capita
- OneStop
- WPM

Enterprise Cash Receipting TAM

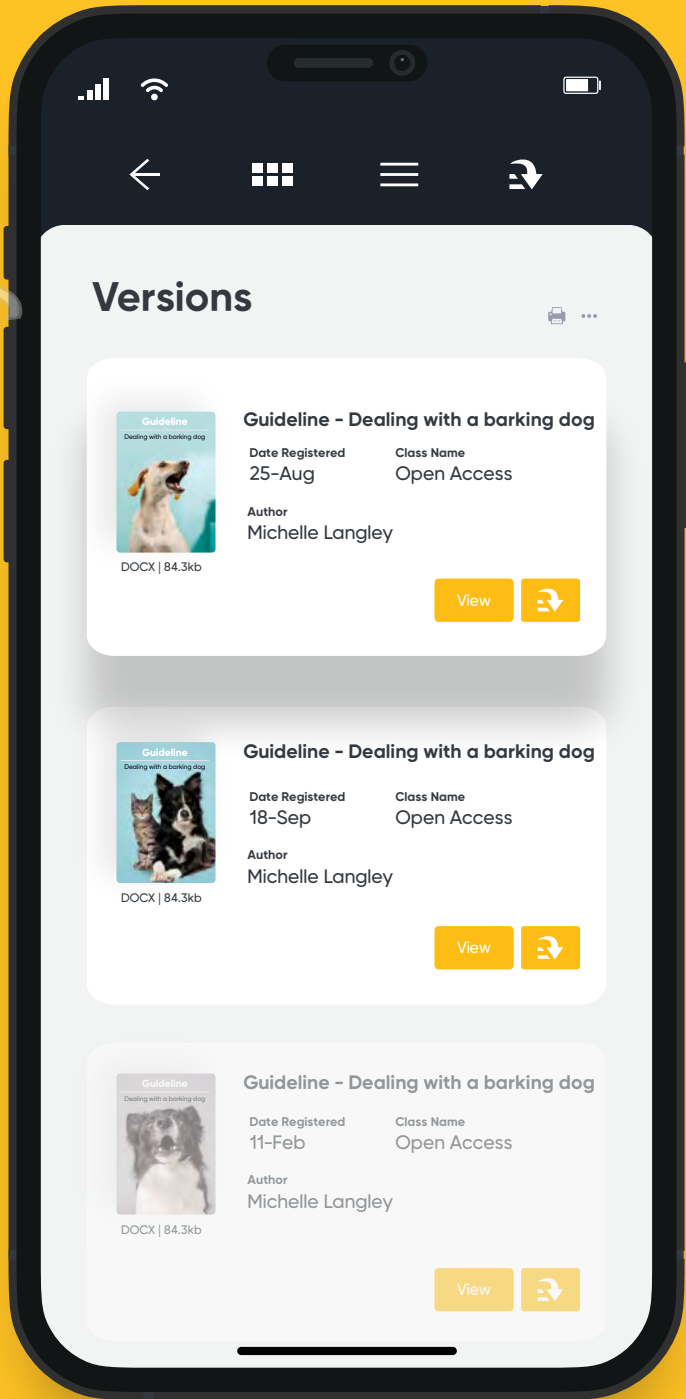
LG	EDU	GOV	AI	HCS	TOTAL
9m	6m	23m	3m	8m	48m

Enterprise Content Management

One place to store, one place to search with Enterprise Content Management

TechnologyOne Enterprise Content Management (ECM) enables you to easily and efficiently capture, store, use and manage content within your enterprise solution.

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Key facts

A modern solution that enables you to easily and efficiently capture, store, use and manage content within your enterprise solution, from any device, anywhere, at any time

Key Competitors

- Content Manager
- Objective ECM
- OpenText
- RecordPoint
- Magiq Documents
- Alfresco
- M-Files
- ELO

Enterprise Content Management TAM

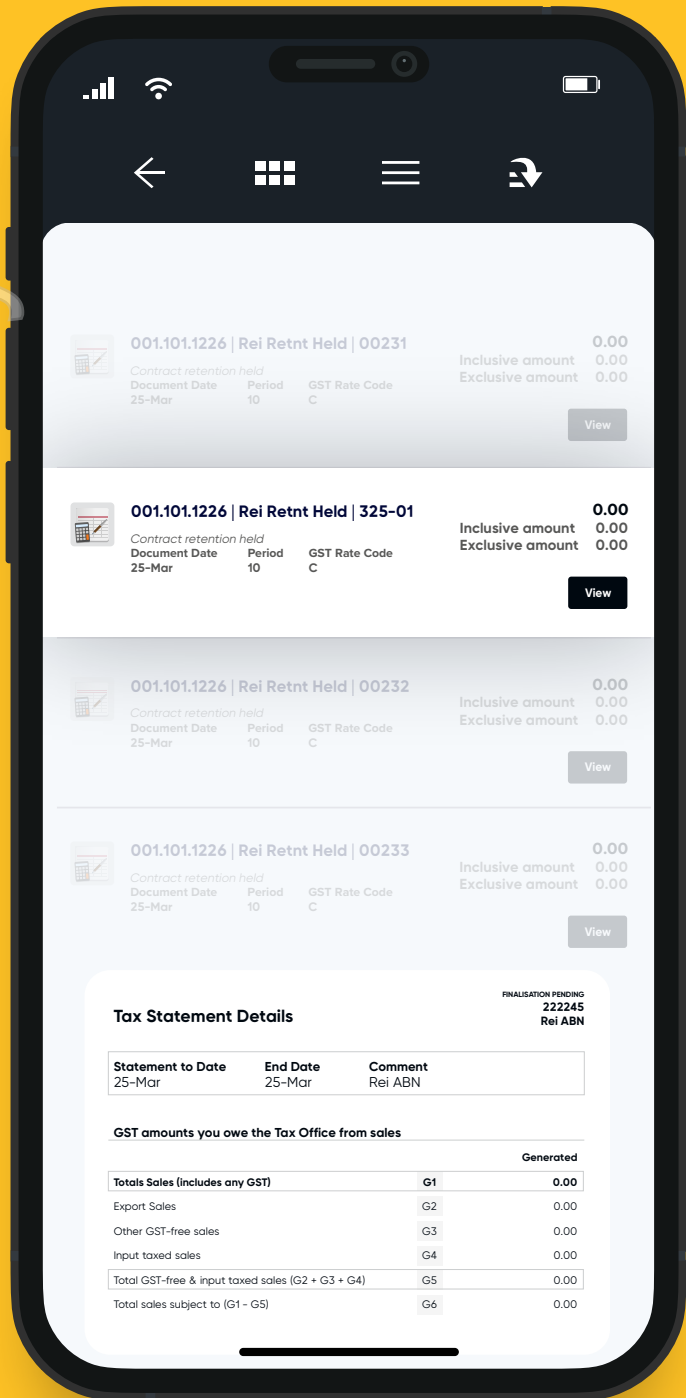
LG	EDU	GOV	AI	HCS	TOTAL
322m	218m	427m	446m	185m	1.596m

Financials

Analyse financial data without complexity and gain complete control

A simple finance solution with the agility to adapt, provide powerful real-time insights, and support your business plan for success.

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Key facts

Seamlessly manage all your financial information and processes in a single integrated solution, creating a single source of truth. Tap into a modern interface available on any device, anywhere, at any time.

Key Competitors

- Oracle
- Microsoft Dynamics
- SAP
- Sage
- SAP Concur
- Expensify
- Expense8

Financials TAM

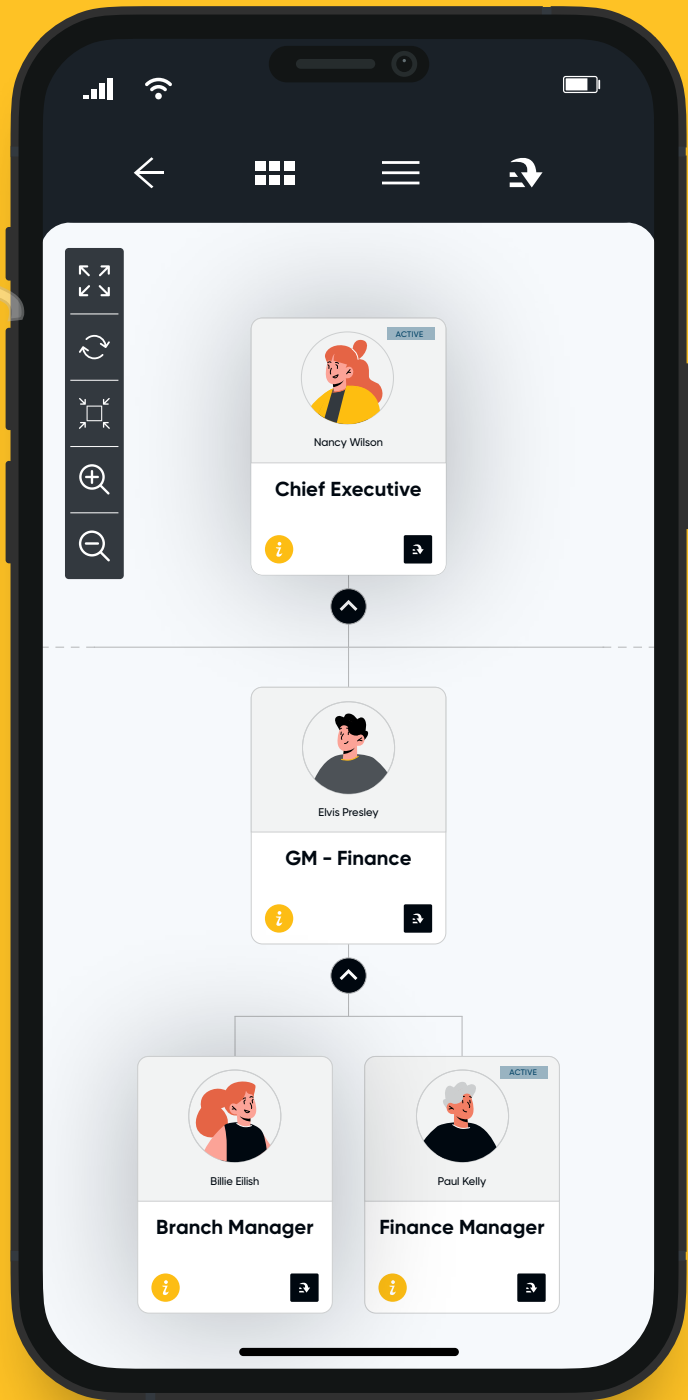
LG	EDU	GOV	AI	HCS	TOTAL
276m	211m	322m	329m	222m	1,360m

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Human Resources & Payroll

Optimise your workforce with our HR and payroll software

**Make informed decisions quickly and empower your employees
with advanced self-service features**



Key facts

From talent acquisition to performance management and succession planning, manage the entire employee lifecycle, streamline operations and make data-driven decisions with Human Resources & Payroll solution.

Key Competitors

- SAP SuccessFactors
- Workday
- Oracle
- Infor
- Ramco
- ADP
- UPK
- MHR

HR & Payroll TAM

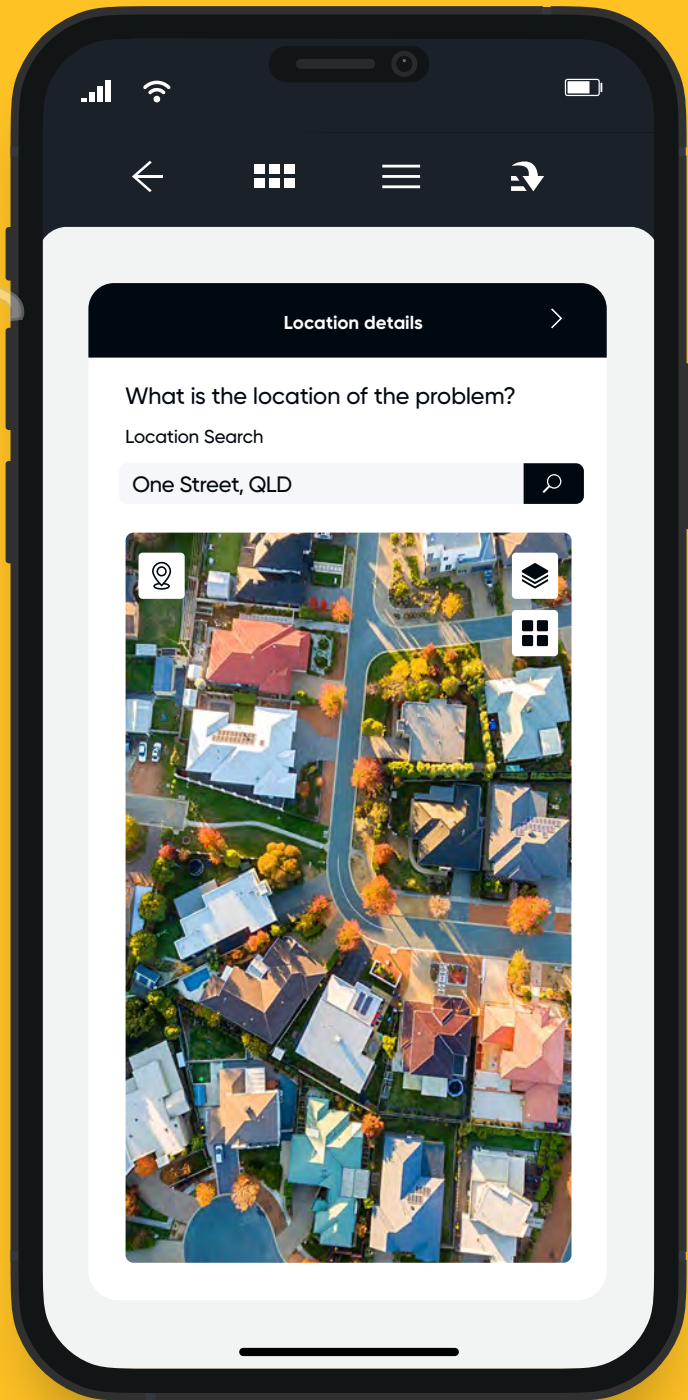
LG	EDU	GOV	AI	HCS	TOTAL
180m	153m	156m	171m	156m	816m

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Property & Rating

Connecting customers, property and community with Property & Rating

**Capture, retrieve and report on all your property information with
a single integrated solution**



Key facts

Combine powerful autonomous intelligence for data management with a high performing revenue engine for billing and regulatory management to meet customer and community needs.

Key Competitors

- Salesforce
- Microsoft
- Oracle
- ReadyTech
- Magiq
- Datacom
- Infor
- Civica

Property & Rating TAM

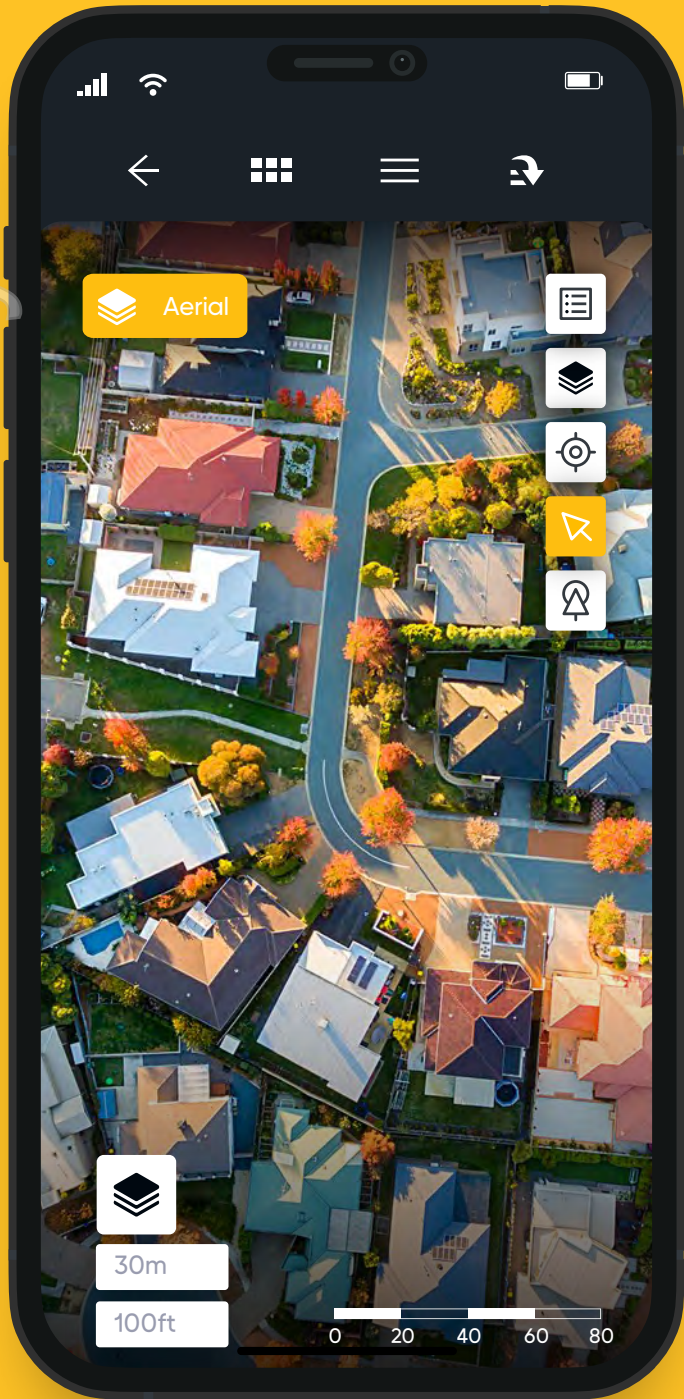
LG	EDU	GOV	AI	HCS	TOTAL
245m	-	-	-	-	245m

Spatial

Harness the power of location, simply

**Gain a new perspective on your spatial data
to better visualise and deeply understand
complex information**

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Key facts

Our natively integrated mapping application makes it easy to visualise and analyse complex geographical data, revealing relationships and providing fresh insights to guide more effective decision making.

Key Competitors

- ESRI
- Pozi
- Development.i

Spatial TAM

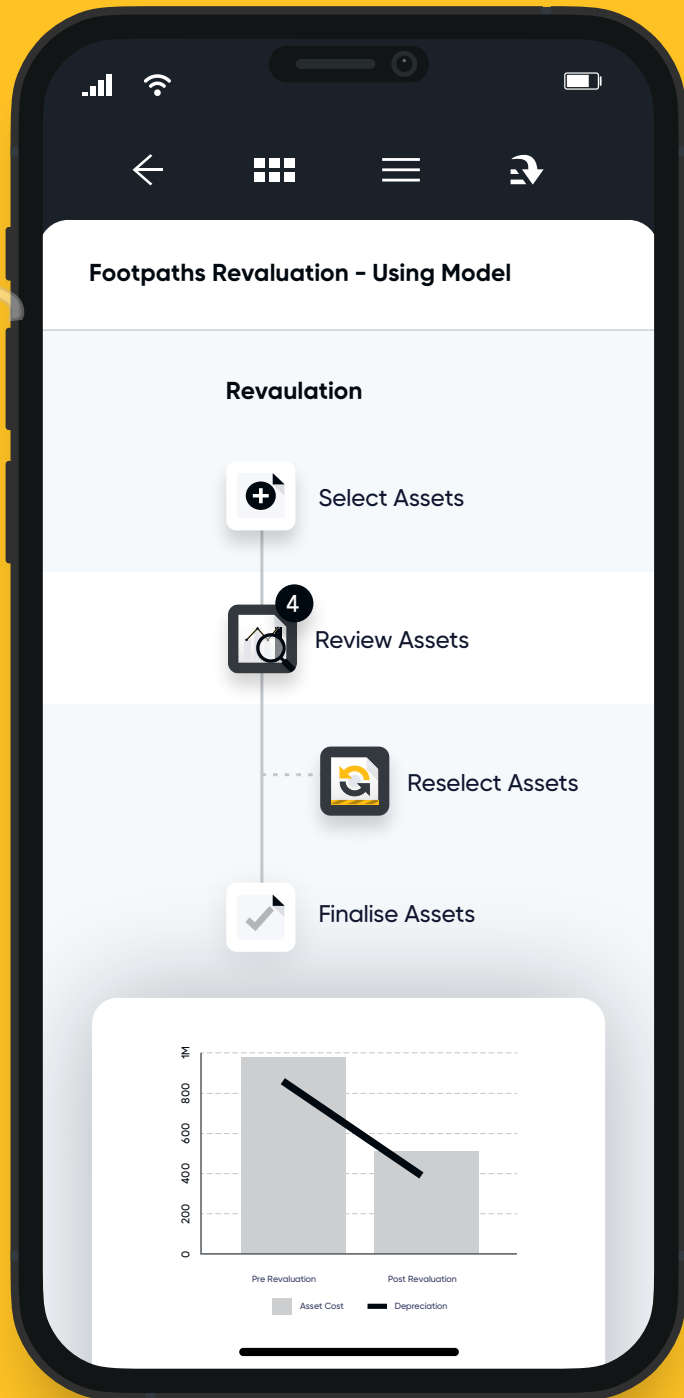
LG	EDU	GOV	AI	HCS	TOTAL
51m	1m	10m	72m	-	134m

Strategic Asset Management

Optimise your assets with an integrated asset management solution

**Maximise performance across the asset lifecycle to unlock
efficiency and meet your organisation's goals**

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Key facts

Provides full visibility into the cost and performance of every asset so you put your resources to the best possible use. From day-to-day operations to long-term asset planning, use one holistic view to increase asset life, reduce risk and build operational efficiency into the entire asset lifecycle.

Key Competitors

- Assetic (Brightly Software)
- SPM Assets
- Copperleaf
- Asset Vision
- Civia Authority
- Civica
- SAP
- Oracle
- Maximo
- MEX
- Confirm
- Archibus
- Conquest
- Pulse Project Solutions
- PojX Synergy
- PojX360
- Authority Actus
- Authority Asset Management App
- Asset Edge – Reflect
- Fulcrum
- iAuditor
- Maximo Everywhere
- Aten Systems.

Strategic Asset Management TAM

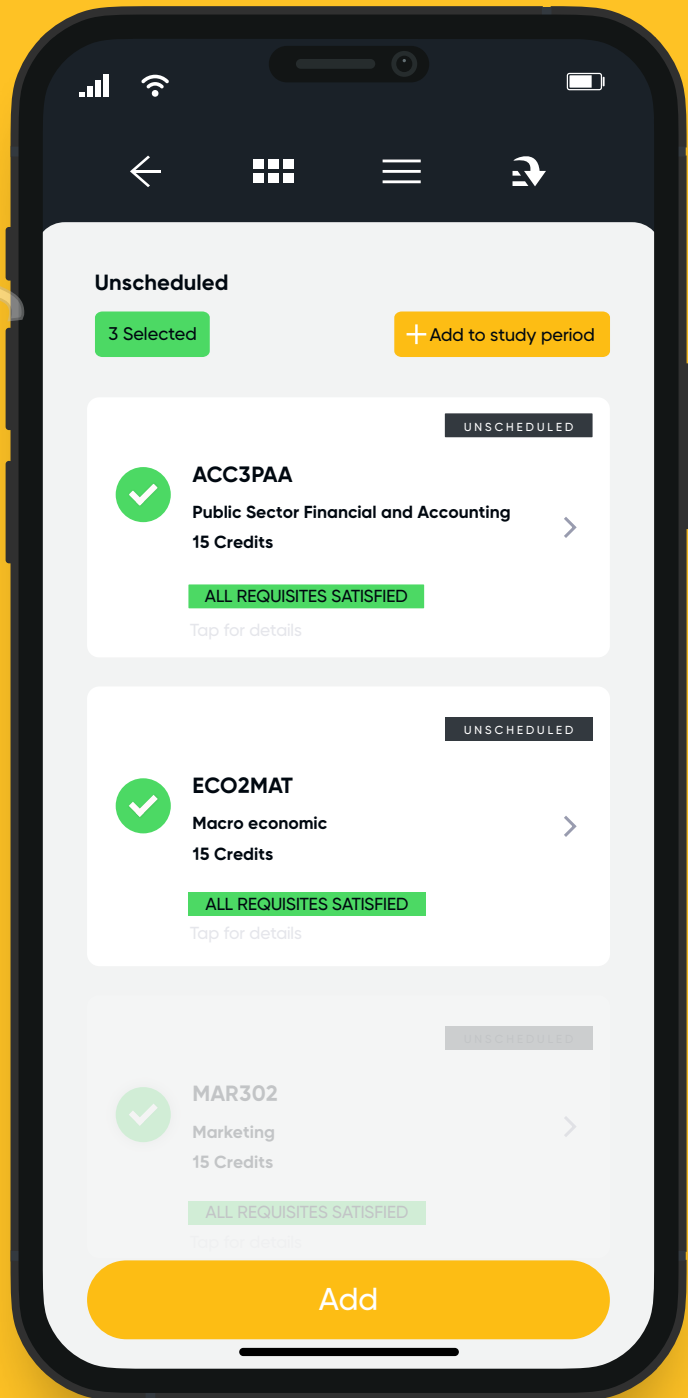
LG	EDU	GOV	AI	HCS	TOTAL
63m	10m	91m	46m	14m	223m

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Student Management

Enhance your Student Management system with intuitive, engaging software

Manage the entire student lifecycle through a purpose-built, single platform



Key facts

Manage the entire student lifecycle from enrolment to graduation. Track and monitor performance, design, develop and circulate academic programs and better connect students, academics and staff.

Key Competitors

- Tribal
- Ellucian
- Thesis
- Salesforce Education Cloud
- PwC Connected Intelligence
- ReadyTech

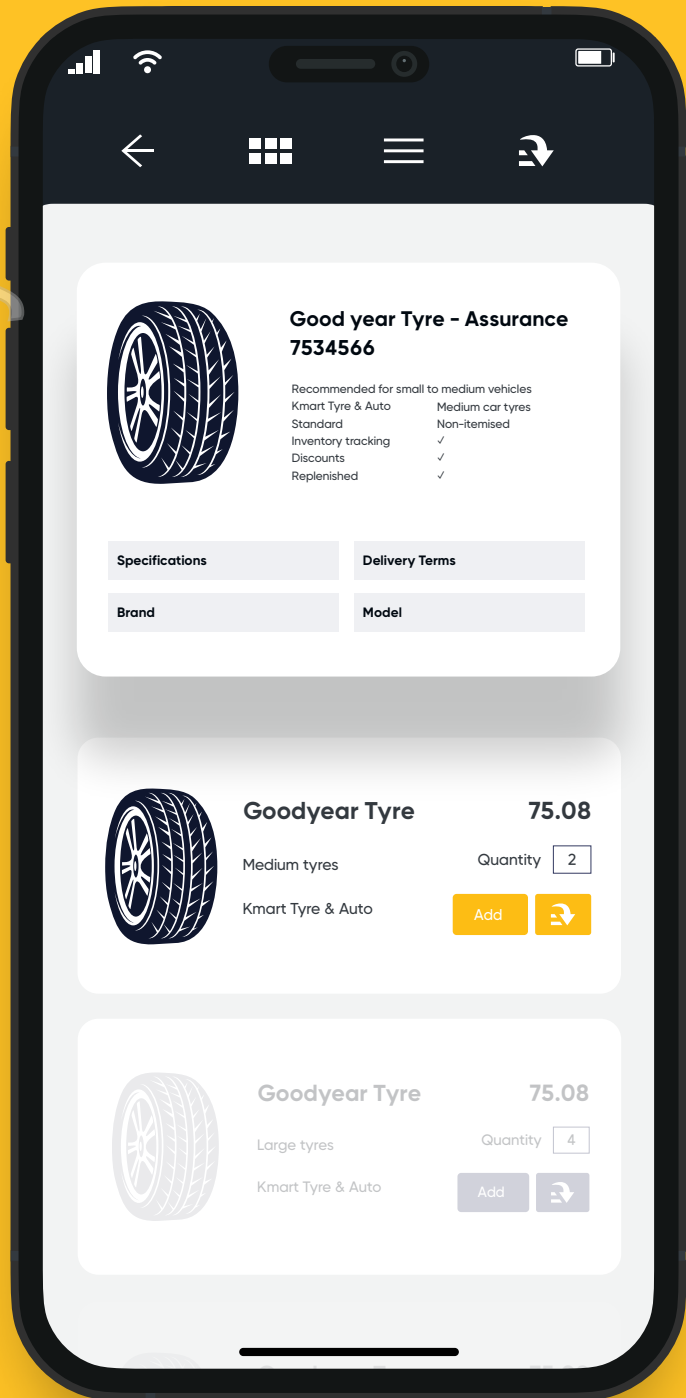
Student Management TAM

LG	EDU	GOV	AI	HCS	TOTAL
-	654m	-	-	-	654m

Supply Chain Management

**Manage your entire
procure-to-pay-process,
stock replenishment and
inventory control**

Transform your procurement process into a strategic and proactive operation with contract management, commitment tracking and simplified reporting.



Key facts

Streamline your entire source-to-pay process, from initial requisition to order approval and receipt of goods and services, as well as stock replenishment and inventory control to future-proof your operations

Key Competitors

- Vendor Panel
- Oracle
- ReadyTech
- Zycus
- SAP Ariba

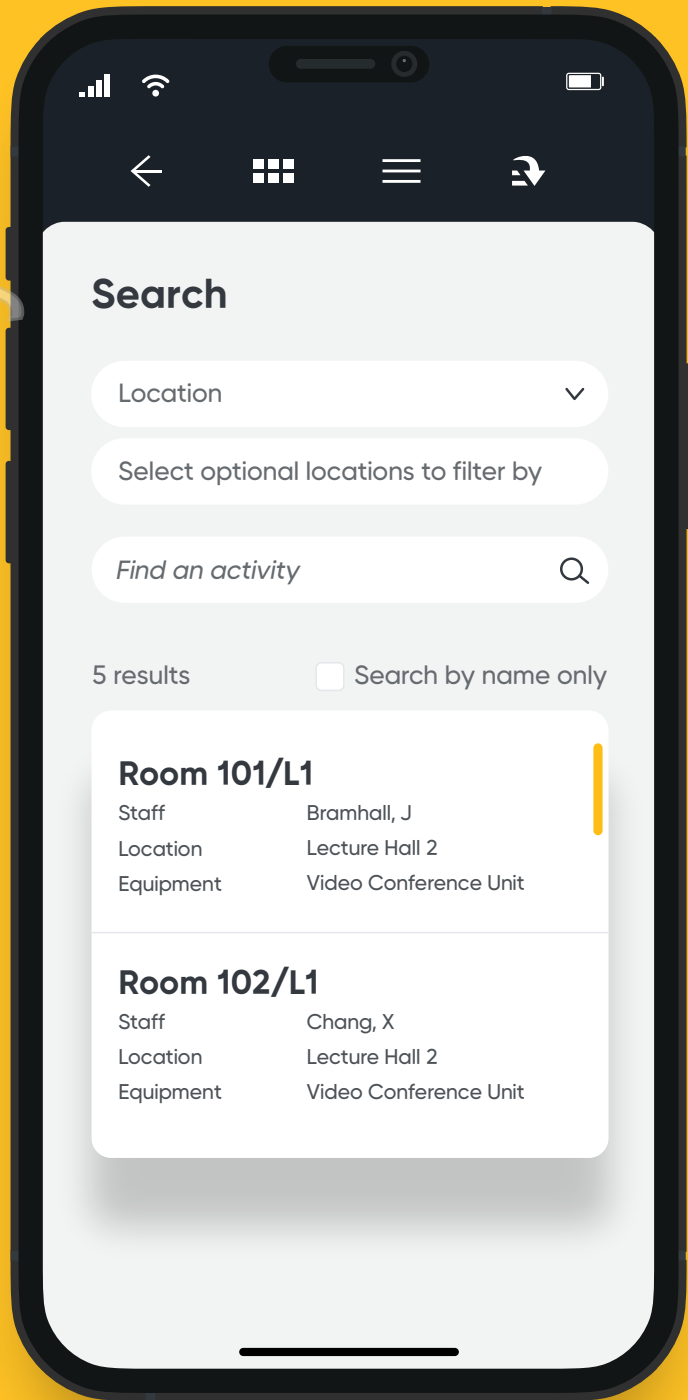
Supply Chain Management TAM

LG	EDU	GOV	AI	HCS	TOTAL
329m	267m	602m	580m	295m	2,073m

Timetabling & Scheduling

Power your institution with Timetabling & Scheduling

Optimise timetabling, resource booking, and exam scheduling to deliver an enhanced, flexible, and tailored student experience. Flexible timetabling and scheduling for any type of course or program, on an individual, group, class and course level



Key facts

Enhance student and staff experiences by optimising and streamlining timetabling, resource booking and exam scheduling with a sophisticated solution built for academic institutions

Key Competitors

- TimeEdit
- CelCat
- JDR
- Semestry
- EventMap.

Timetabling & Scheduling TAM

LG	EDU	GOV	AI	HCS	TOTAL
-	346m	-	-	-	346m



Southern Downs
REGIONAL COUNCIL

Southern Downs Regional Council

By eliminating old manual processes and adopting TechnologyOne's SaaS Plus Enterprise Asset Management, Southern Downs Regional Council is gaining full visibility over their assets, leading to improved decision-making and realising lightning-fast time-to-value.

"Working with TechnologyOne, we identified the paths we could explore to transition to TechnologyOne's new CiA Enterprise Asset Management software. One of the options was SaaS Plus, which offers a faster implementation, meaning the Council could reap the benefits at an accelerated pace compared to traditional time and material methodology."

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G. Singh
Gurbindar Singh
CHIEF FINANCIAL OFFICER

Southern Downs Regional Council

Appendix D: Glossary

APAC	Asia Pacific - Includes Australia, New Zealand, Malaysia and the South Pacific
ARR	Annual recurring revenue
Cash Flow Generation	Cash flow from Operating Cash Flow less capitalised development costs, capitalised commission costs and lease payments during the period
Churn	Lost customers
CPS	Cents per share
DXP	Digital Experience Platform
EBIT	Earnings before interest and taxes
EBITDA	Earnings before interest, taxes, depreciation, and amortisation
EBITDAR	Earnings before interest, taxes, depreciation, amortisation, and research and development costs
EPS	Earnings per share
ILF	Initial licence fees
Legacy Licence Fees	On-Premise licence fees / Perpetual licence fees
LG DXP	Local Government Digital Experience Platform
LTV	Lifetime value
NPAT	Net profit after tax
PBT	Profit before tax
PCP	Prior Corresponding Period
Profit before tax - Underlying	Profit before tax excluding the impact of increased provision for a civil employment matter
R&D	Research & Development
ROE	Return on equity
SaaS ARR	Annual recurring revenue relating to customers on the software as a service platform

TechnologyOne (ASX: TNE) is Australia's largest enterprise software company and one of Australia's top 100 ASX-listed companies, with locations globally. We provide a global SaaS ERP solution that transforms business and makes life simple for our customers. Our deeply integrated enterprise SaaS solution is available on any device, anywhere and any time and is incredibly easy to use. Over 1,300 leading corporations, government agencies, local councils and universities are powered by our software.

For more than 36 years, we have been providing our customers enterprise software that evolves and adapts to new and emerging technologies, allowing them to focus on their business and not technology.

ABN: 84 010 487 180



TechnologyOneCorp.com

Australia | New Zealand | South Pacific | Asia | United Kingdom

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