PRESS RELEASE

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Fragmented global POS software market creates opportunities for retail and hospitality technology vendors

Brand new RBR study reveals 6.6 million installations worldwide at tier 1 retailers and hospitality firms

Highly-developed general merchandise and hospitality sectors make North America the largest region

Global POS Software 2016, a new study by strategic research and consulting firm RBR, reveals that North America accounts for 42% of the world's point-of-sale (POS) software installations. The report, the first in-depth international study of this dynamic market, shows that Asia-Pacific is the second largest region, followed by western Europe.

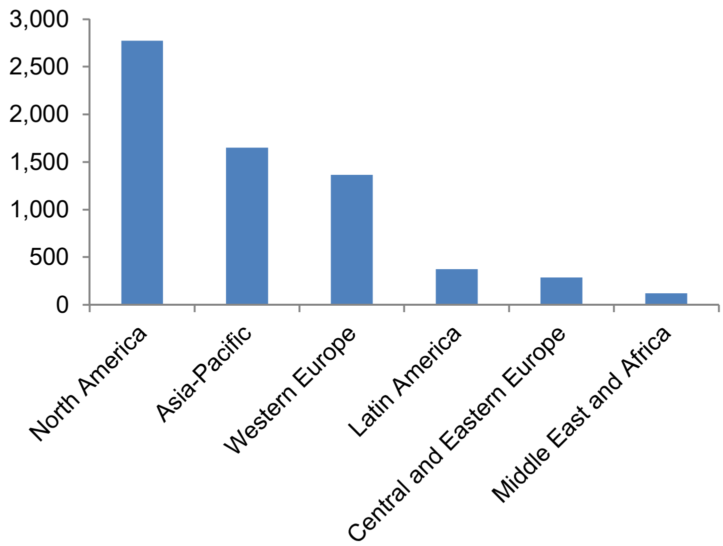
General merchandise, comprising both speciality chains and mixed retailers such as Walmart, makes up half of the North American market, driven by high consumer spending. The region is also home to many of the world's largest hospitality firms, including Yum! Brands, Starbucks and Marriott International.

China and Japan are the main POS software markets in Asia-Pacific and together account for 67% of the region's deployments. Small format stores, such as 7-Eleven, represent a significant part of the grocery sector across the region, particularly in Japan.

Grocery retail sector plays a central role in Europe

RBR's research also highlights the importance of grocery retail in Europe; the heavily concentrated sector, which includes supermarkets, convenience stores and pharmacies, accounts for 70% of the European POS software market. There are a limited number of large grocery players in each country, including Edeka in Germany, Système U in France, and Magnit in Russia.

POS Software Installations by Region, June 2016



Source: Global POS Software 2016 (RBR)

NCR is the world's largest POS software provider, followed by Oracle and Toshiba

RBR has found that NCR has the largest number of POS software installations of any vendor worldwide, with Oracle and Toshiba close behind. NCR leads the global grocery segment, and is the largest vendor overall in both western Europe and the Middle East and Africa.

Oracle is the second largest POS software supplier worldwide, and ranks first in North America. It also leads the global hospitality and general merchandise segments.

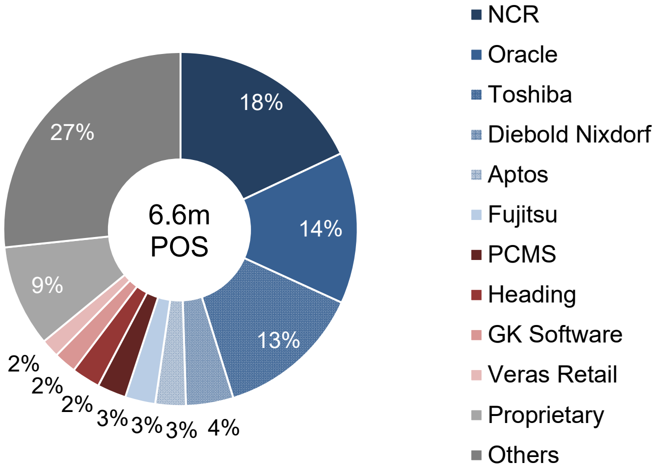
Toshiba is the largest supplier to both Asia-Pacific and Latin America. The vendor has a strong focus on grocery retailers and mass merchandisers.

Other leading international vendors include Diebold Nixdorf, which ranks second in EMEA, and Aptos, which has the majority of its installations in the North American general merchandise segment.

Japan's Fujitsu and PCMS of the UK both have major customers in the US as well as strong positions in their home markets.

GK Software has the largest share in Central and Eastern Europe, while most users of software from Veras Retail, which acquired JDA's POS software business in 2016, are in North America.

Shares of Global POS Software Installations, June 2016



Source: Global POS Software 2016 (RBR)

POS software fulfils an important role in omnichannel retailing

In this competitive and fragmented market, retailers are looking to POS software vendors to help them provide customers with a seamless shopping experience. Alan Burt, who led the research for RBR remarked: *"In an omnichannel world, retailers increasingly understand that the in-store experience needs to echo and enhance their online capabilities; the POS application plays a key role in enabling unified commerce."*

Notes to editors

These figures and insights are based on RBR's study *Global POS Software 2016*. The first in-depth international study of this dynamic market analyses nearly 1,000 projects by more than 40 vendors. For more information about this report or to discuss the findings in more detail please email Alan Burt (alan.burt@rbrlondon.com) or call +44 20 8831 7322.

RBR is a strategic research and consulting firm with three decades of experience in banking and retail automation, cards and payments. It assists its clients by providing independent advice and intelligence through published reports, consulting, newsletters and events.