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# 2014 annual results

*qualified as estimates under R. AMF 2004-04*

Wednesday, February 18, 2015

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Bezons

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- ▶ This document contains further forward-looking statements that involve risks and uncertainties concerning the Group's expected growth and profitability in the future. Actual events or results may differ from those described in this document due to a number of risks and uncertainties that are described within the 2013 Reference Document filed with the Autorité des Marchés Financiers (AMF) on April 2, 2014 under the registration number: D14-0272 and its update filed with the Autorité des Marchés Financiers (AMF) on August 5, 2014 under the registration number: D.14-0272-A01. This document does not contain or constitute an offer of Atos' shares for sale or an invitation or inducement to invest in Atos' shares in France, the United States of America or any other jurisdiction.

The Group's financial information relating to the financial year ended December 31, 2014 included in this document have been prepared using a process similar to that adopted for the preparation of the Group's annual consolidated financial statements. The Board of Directors of Atos SE has examined at its February 18, 2015 meeting the Group's financial information for the financial year ended December 31, 2014 and has approved their communication. The Group's financial statements which will be formally approved by the Board of Directors, to be held on March 26, 2015, shall include any material events previously unknown by the Group and of which it becomes aware or which may occur after February 18, 2015. The audit procedures on the presented financial information examined by the Board of Directors held on February 18, 2015 have been performed by the statutory auditors but will only be finalized in the view of the issuance of their certification report, after the meeting of the Board of Directors to be held on March 26, 2015 approving the Group Financial Statements and the finalization of the verification procedures required by law. The consolidated financial statements will then be submitted to the approval of the general meeting of shareholders scheduled to take place on May 2015. Therefore the financial information presented shall be, in accordance with the AMF recommendation n° 2004-04, qualified as estimated financial results.

- ▶ Revenue organic growth is presented at constant scope and exchange rates.
- ▶ Business Units include **Germany, France, United-Kingdom & Ireland, Benelux & The Nordics** (BTN: The Netherlands, Belgium, Luxembourg, Denmark, Finland, Sweden, and Estonia), **Worldline, Central & Eastern Europe** (CEE: Austria, Bulgaria, Croatia, Cyprus, Czech Republic, Greece, Hungary, Italy, Lithuania, Poland, Romania, Russia, Serbia, Slovakia, Switzerland and Turkey), **North America** (USA and Canada), **Iberia** (Spain, Portugal, and Andorra), and **Other Business Units** including Major Events, Latin America (Brazil, Argentina, Mexico, Colombia, Chile and Uruguay), Asia-Pacific (Australia, China, Hong Kong, Indonesia, Japan, Malaysia, New Zealand, Philippines, Singapore, Taiwan and Thailand), India, Middle East & Africa (IMEA: Algeria, Benin, Burkina Faso, Egypt, Gabon, India, Ivory Coast, Lebanon, Madagascar, Mali, Mauritius, Morocco, Qatar, Saudi Arabia, Senegal, South Africa and UAE), and Cloud & Enterprise Software.

1. 2014 highlights and 2015 objectives
2. Financial performance
3. Commercial activity
4. Top Tier One Program and integration streams
5. Conclusion
6. Q&A session

Thierry Breton, Chairman & CEO

# **2014 highlights and 2015 objectives**

# 2014 highlights

2014 annual  
results

February 18, 2015

Completion of  
the **IPO** of

**worldline**  
e-payment services

providing strategic  
flexibility

**Acquisition of**

**BULL**

a European global  
leader in Cloud,  
Cybersecurity, and  
Big Data

Project to  
acquire

**xerox** 

ITO operations and  
worldwide strategic  
collaboration

Enhanced  
leadership in **digital  
transformation**

Cloud Computing  
**+37%**

Big Data & Cyber-  
security  
**+14%**

Successful delivery of  
the IT Services for

**sochi.ru**  
**2014** 

Worldwide IT contract  
with **IOC** extended  
until 2024

Atos recognized by  
Industry Analysts  
as a

**Leader**

for its state-of-the-  
art competencies in  
Data Center  
virtualization

# Key figures

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2014 annual  
results

February 18, 2015

	2014	2013
<b>Revenue</b> (€m)	<b>9,051</b>	<b>8,615</b>
<b>Operating margin</b> (in % and €m)	<b>7.8%</b> € 702 m	<b>7.5%</b> € 645 m
<b>Free cash flow</b> (€m)	<b>367</b>	<b>365</b>
<b>Net cash</b> (€m)	<b>989</b>	<b>905</b>

2014 qualified as estimates under R. AMF 2004-04

# Key figures

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2014 annual  
results

February 18, 2015

	2014	2013
<b>Net income</b> (€m)	<b>283</b>	<b>260</b>
<b>Net income Group share</b> (€m)	<b>265</b>	<b>262</b>
<b>Order entry</b> (€m)	<b>9,113</b>	<b>8,790</b>
<b>Book-to-bill</b>	<b>101%</b>	<b>102%</b>
<b>Backlog</b> (€bn)	<b>16.2</b>	<b>15.2</b>
<b>Total number of employees</b>	<b>85,865</b>	<b>76,320</b>

2014 qualified as estimates under R. AMF 2004-04

### ► Revenue

The Group targets a **positive organic revenue growth**

### ► Operating margin

The Group has the objective to improve its operating margin rate targeting **8.0% to 8.5% of revenue**

### ► Free cash flow

Taking into account the cash-out to deliver Bull cost synergies, the Group expects to generate a free cash flow **above 2014 level**

*The figures above exclude Xerox ITO contribution*



Michel-Alain Proch,  
Executive Vice President and Group CFO

## **Financial performance**

# Constant scope and exchange rates reconciliation

2014 annual results

February 18, 2015

<i>In € million</i>	<b>FY 2014</b>	<b>FY 2013</b>	<b>% growth</b>
Statutory revenue	9,051	8,615	+5.1%
Scope effect		508	
Exchange rates effect		28	
<b>Revenue at constant scope and exchange rates</b>	<b>9,051</b>	<b>9,151</b>	<b>-1.1%</b>
Operating margin	701.9	645.2	+8.8%
Scope effect		55.5	
Exchange rates effect		0.6	
<b>Operating margin at constant scope and exchange rates</b>	<b>701.9</b>	<b>701.3</b>	<b>+0.1%</b>
<i>as % of revenue</i>	<i>7.8%</i>	<i>7.7%</i>	

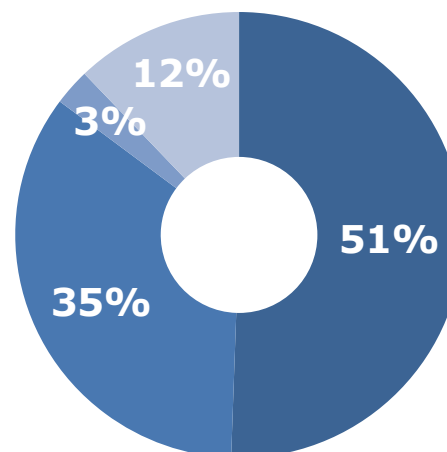
- ▶ **Scope effect** was related to the acquisitions of Bull (France, August 2014), Cambridge Technology Partners (Central & Eastern Europe, June 2014), WindowLogic (Asia-pacific, July 2013) and the disposals of Metrum (The Netherlands, January 2014) and of Atos Formation (France, March 2013).
- ▶ **Exchange rates effect** mainly resulted from the British pound strengthening versus the euro (+5.4%) and from the Turkish lira (-13.4%), the Argentina peso (-33.0%) and the Brazilian real (-8.8%) depreciating versus the euro.

# 2014 revenue performance by Service Line

2014 annual results

February 18, 2015

- ▶ Sequential improvement in revenue evolution over 2014
- ▶ Stable revenue during the fourth quarter
- ▶ +90 basis points improvement in Consulting & Systems Integration profitability
- ▶ Worldline profitability improved by +60 basis points



- Managed Services
- Consulting & Systems Integration
- Big Data & Cyber-security
- Worldline

In € million	Revenue				Operating margin		Operating margin %	
	FY 2014	FY 2013*	% yoy	% organic	FY 2014	FY 2013*	FY 2014	FY 2013*
Managed Services	4,577	4,670	+4.6%	-2.0%	364.4	403.1	8.0%	8.6%
Consulting & Systems Integration	3,136	3,173	+8.5%	-1.1%	233.3	206.8	7.4%	6.5%
Big Data & Cyber-security	240	210	N/A	+14.0%	52.3	44.6	21.8%	21.2%
Corporate costs**					-118.4	-116.6	-1.5%	-1.4%
<b>Total IT Services</b>	<b>7,952</b>	<b>8,053</b>	<b>N/A</b>	<b>-1.2%</b>	<b>531.6</b>	<b>537.9</b>	<b>6.7%</b>	<b>6.7%</b>
<b>Worldline***</b>	<b>1,099</b>	<b>1,098</b>	<b>N/A</b>	<b>+0.1%</b>	<b>170.4</b>	<b>163.5</b>	<b>15.5%</b>	<b>14.9%</b>
<b>TOTAL GROUP</b>	<b>9,051</b>	<b>9,151</b>	<b>+5.1%</b>	<b>-1.1%</b>	<b>701.9</b>	<b>701.3</b>	<b>7.8%</b>	<b>7.7%</b>

\* at constant scope and exchange rates

\*\* Corporate costs excludes Global delivery Lines costs allocated to the Services Lines

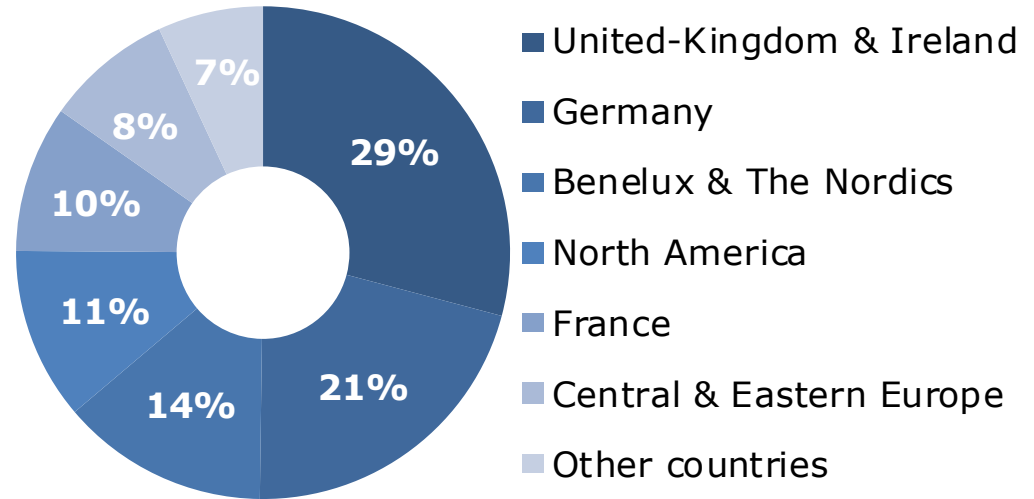
\*\*\* Worldline reported +2.8% organic growth on a stand alone basis

# Managed Services

**2014 annual results**

February 18, 2015

- ▶ **Growth in the UK fuelled by BPO**
- ▶ **Strong activity in Asia Pacific, in the Middle-East, and in India**
- ▶ **Conditions still challenging in continental Europe**



<i>In € million</i>	<b>FY 2014</b>	<b>FY 2013*</b>	<b>% yoy</b>	<b>% organic</b>
Revenue	4,577	4,670	+4.6%	-2.0%
Operating margin	364.4	403.1		
Operating margin rate	8.0%	8.6%		

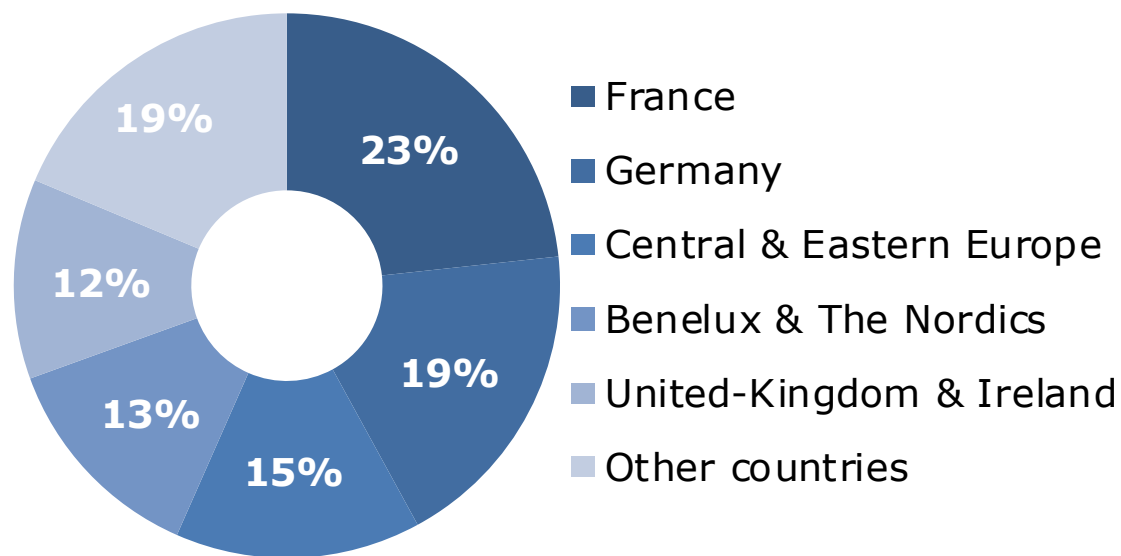
\* at constant scope and exchange rates

# Consulting & Systems Integration

**2014 annual results**

February 18, 2015

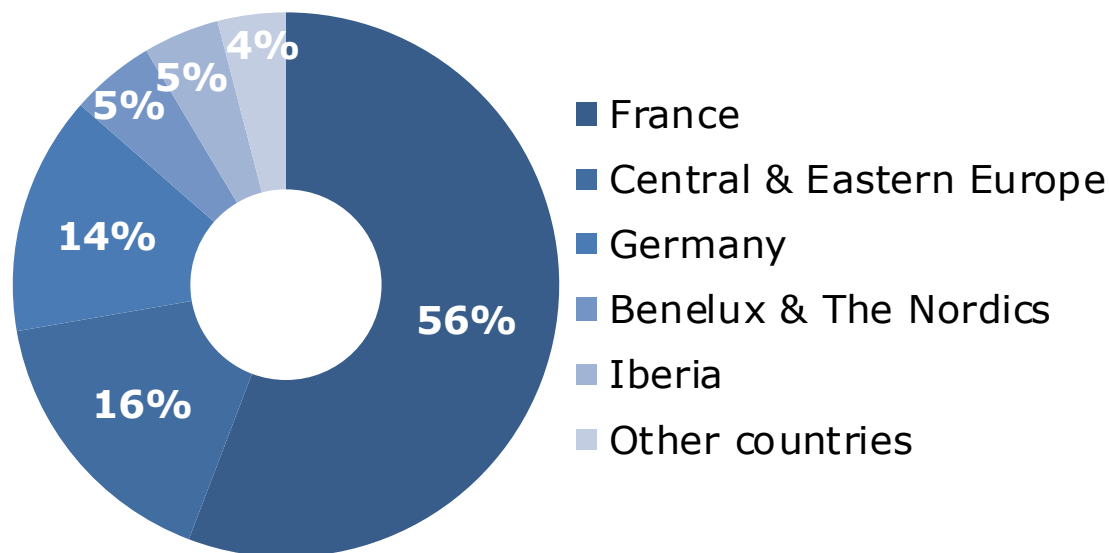
- ▶ Revenue grew strongly in Public & Health
- ▶ New Application Management contract in the UK
- ▶ Improved revenue evolution in Q4 compared to the first nine months of 2014
- ▶ +90 bps profitability improvement



<i>In € million</i>	<b>FY 2014</b>	<b>FY 2013*</b>	<b>% yoy</b>	<b>% organic</b>
Revenue	3,136	3,173	+8.5%	-1.1%
Operating margin	233.3	206.8		
Operating margin rate	7.4%	6.5%		

\* at constant scope and exchange rates

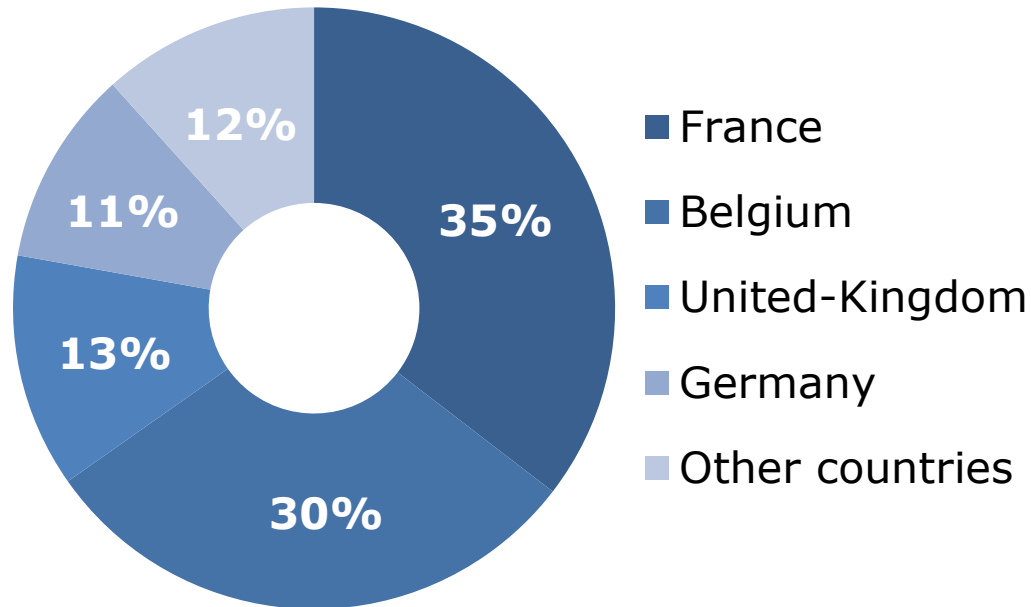
- ▶ **Double-digit revenue growth**
- ▶ **Strong activity in High Performance Computing (HPC)**
- ▶ **Customer demand in the Security practice strongly accelerating**
- ▶ **+60 bps profitability improvement**



*In € million*

	<b>FY 2014</b>	<b>FY 2013*</b>	<b>% organic</b>
Revenue	240	210	+14.0%
Operating margin	52.3	44.6	
<i>Operating margin rate</i>	<i>21.8%</i>	<i>21.2%</i>	

\* at constant scope and exchange rates



- ▶ Revenue up +2.8% on a standalone basis and +4.0% during the fourth quarter
- ▶ Good performance in Merchant Services
- ▶ Strong growth in the e-ticketing and payment terminal business during the fourth quarter
- ▶ Good momentum in Online Banking & Payment Software Licensing
- ▶ +60 bps profitability improvement

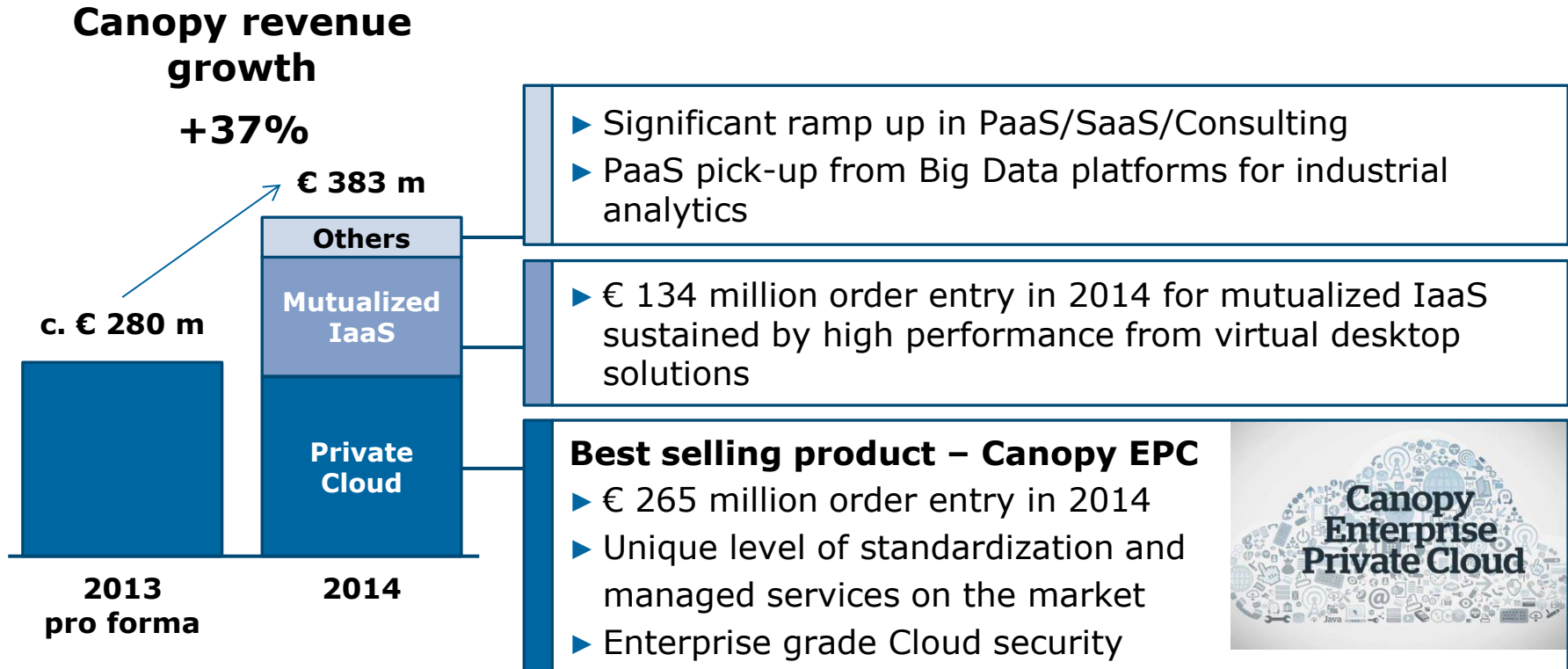
<i>In € million</i>	<b>FY 2014</b>	<b>FY 2013*</b>	<b>% organic</b>
Revenue	1,099	1,098	+0.1%
Operating margin	170.4	163.5	
<i>Operating margin rate</i>	15.5%	14.9%	

\* at constant scope and exchange rates

# Strong revenue growth in Cloud operations

2014 annual results

February 18, 2015



**Fully in line with 2016 ambition: € 700 million FY revenue**



# 2014 revenue performance by Business Unit

2014 annual results

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- ▶ Challenging market environment for some large European economies
- ▶ Continued momentum of the Public sector in the UK
- ▶ Recovery signs in France and Iberia over the second half of 2014
- ▶ Constant optimization of Atos pension schemes contributing to profitability improvement (in the Netherlands and in the UK)
- ▶ 6 out of 9 Business Units either stabilized or improved their profitability

In € million	Revenue				Operating margin		Operating margin %	
	FY 2014	FY 2013*	% yoy	% organic	FY 2014	FY 2013*	FY 2014	FY 2013*
United-Kingdom & Ireland	1,707	1,616	+3.6%	+5.6%	143.9	131.9	8.4%	8.2%
Germany	1,587	1,688	-4.4%	-6.0%	110.7	126.5	7.0%	7.5%
France	1,305	1,327	+28.0%	-1.6%	73.3	89.1	5.6%	6.7%
Benelux & The Nordics	1,038	1,117	-4.2%	-7.1%	128.7	125.0	12.4%	11.2%
Central & Eastern Europe	877	895	+0.5%	-2.0%	72.6	68.0	8.3%	7.6%
North America	597	614	-1.6%	-2.7%	44.8	45.7	7.5%	7.4%
Iberia	330	325	+1.7%	+1.5%	10.9	12.2	3.3%	3.8%
Other BUs	511	471	+1.5%	+8.5%	59.0	54.0	11.5%	11.5%
Global structures**					-112.3	-114.6	-1.4%	-1.4%
<b>Total IT Services</b>	<b>7,952</b>	<b>8,053</b>	<b>N/A</b>	<b>-1.2%</b>	<b>531.6</b>	<b>537.9</b>	<b>6.7%</b>	<b>6.7%</b>
<b>Worldline***</b>	<b>1,099</b>	<b>1,098</b>	<b>N/A</b>	<b>+0.1%</b>	<b>170.4</b>	<b>163.5</b>	<b>15.5%</b>	<b>14.9%</b>
<b>TOTAL GROUP</b>	<b>9,051</b>	<b>9,151</b>	<b>+5.1%</b>	<b>-1.1%</b>	<b>701.9</b>	<b>701.3</b>	<b>7.8%</b>	<b>7.7%</b>

\* at constant scope and exchange rates

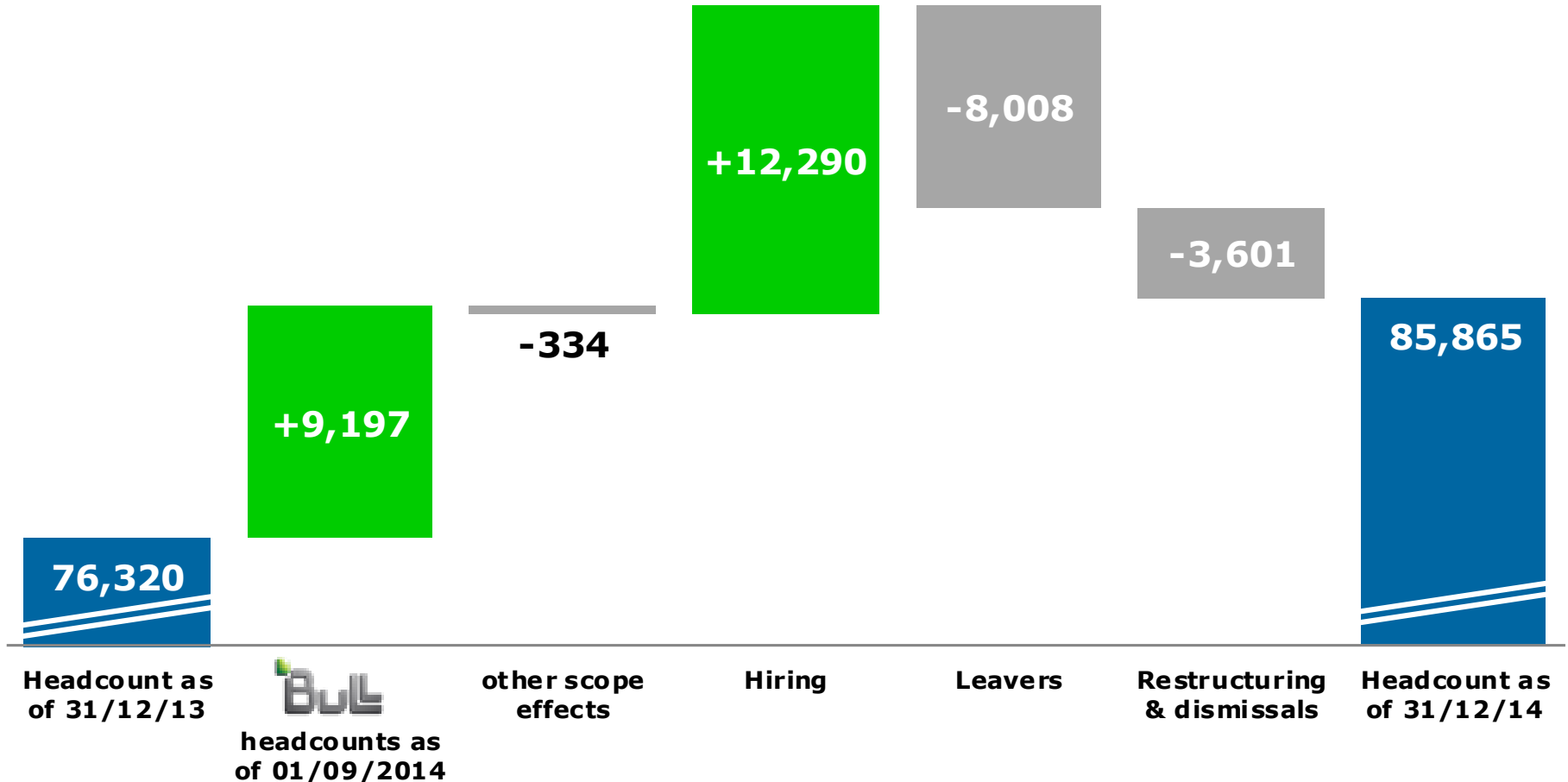
\*\* Global structures include the Global Delivery Lines costs not allocated to the Group Business Unit and the Corporate costs

\*\*\* Worldline reported +2.8% organic growth on a stand alone basis

# Headcount evolution of Atos Group

2014 annual results

February 18, 2015



# Income statement

**2014 annual  
results**

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<i>In € million</i>	<b>2014</b>	<b>2013</b>
<b>Revenue</b>	<b>9,051</b>	<b>8,615</b>
<b>Operating margin</b>	<b>701.9</b>	<b>645.2</b>
<i>% revenue</i>	<i>7.8%</i>	<i>7.5%</i>
Staff reorganization	-129.9	-102.2
Rationalization & associated costs	-25.9	-37.3
Integration & acquisition costs	-15.4	-19.9
Customer relationships amortization (PPA)	-50.7	-44.3
Others	-39.7	-24.8
<b>Operating income</b>	<b>440.3</b>	<b>416.7</b>
Net financial expenses	-51.6	-62.7
Income tax expenses	-104.1	-95.9
Non-controlling interests & associates	-19.4	3.5
<b>Net income Group share</b>	<b>265.2</b>	<b>261.6</b>

2014 qualified as estimates under R. AMF 2004-04

# Cash flow statement

**2014 annual  
results**

February 18, 2015

<i>In € million</i>	<b>2014</b>	<b>2013</b>
<b>OMDA*</b>	<b>919.4</b>	<b>865.4</b>
Capital Expenditures	-354.1	-340.0
Change in working capital requirement	104.6	111.2
<b>Cash flow from operations</b>	<b>669.9</b>	<b>636.6</b>
Taxes paid	-119.7	-96.7
Net costs of financial debt paid	-15.3	-30.9
Reorganisation	-137.8	-114.0
Rationalisation	-39.6	-53.4
Integration & acquisition costs	-15.0	-19.9
Net financial investments	-0.8	-2.8
Profit sharing amounts payable transferred to debt	-1.0	-3.2
Other changes	26.4	49.4
<b>Free cash flow</b>	<b>367.1</b>	<b>365.1</b>
Net material (acquisitions) / disposals	-341.5	-16.2
Capital increase / (decrease)	288.4	480.1
Share buy-back	-234.5	-115.8
Dividends paid to shareholders	-38.3	-17.3
<b>Change in net debt</b>	<b>41.2</b>	<b>695.9</b>
Impact of foreign exchange rate fluctuation	42.5	-22.6
<b>Opening net cash</b>	<b>905.4</b>	<b>232.1</b>
<b>Closing net cash</b>	<b>989.1</b>	<b>905.4</b>

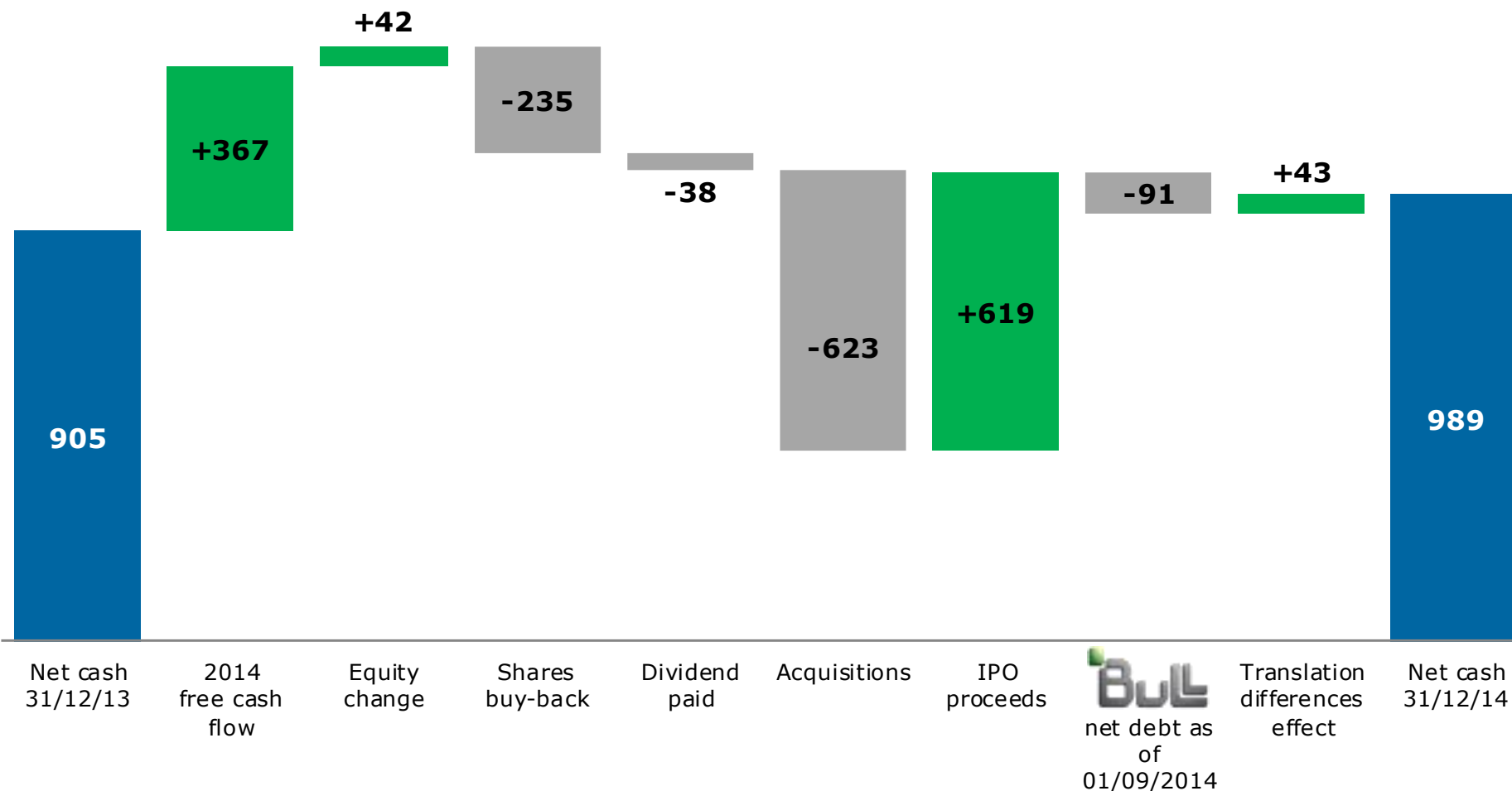
2014 qualified as estimates under R. AMF 2004-04. \* Operating Margin before Depreciation and Amortization

# Net cash evolution

(in € million)

2014 annual results

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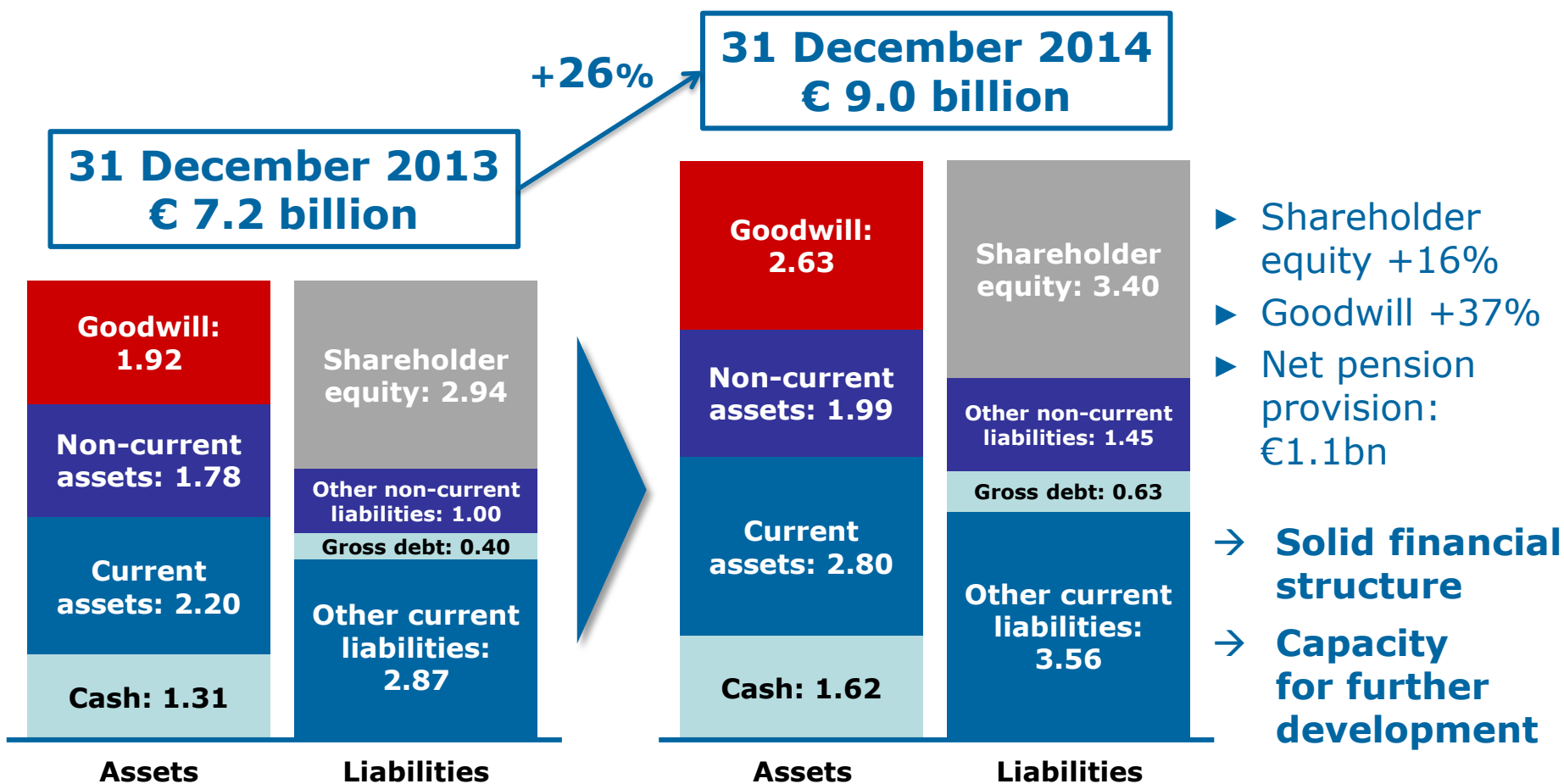
2014 qualified as estimates under R. AMF 2004-04

# Simplified balance sheet evolution

(in € billion)

**2014 annual results**

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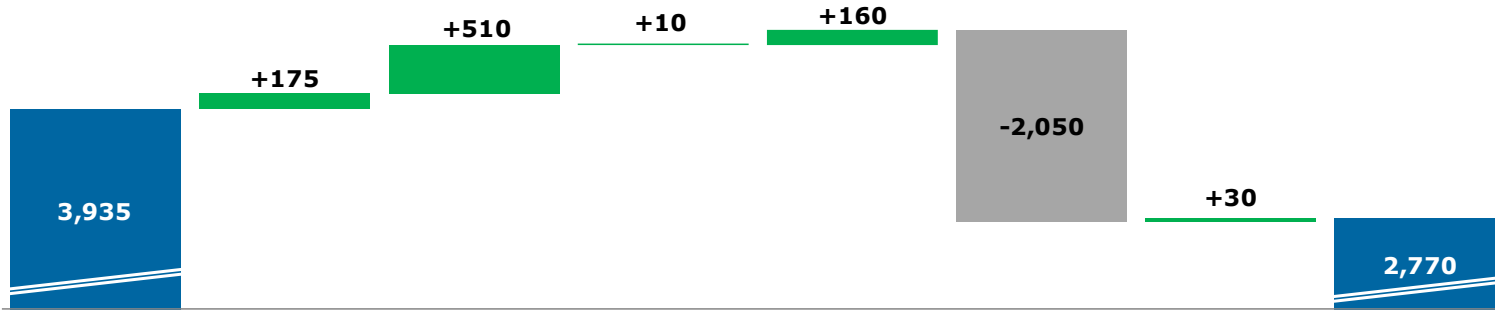


2014 qualified as estimates under R. AMF 2004-04

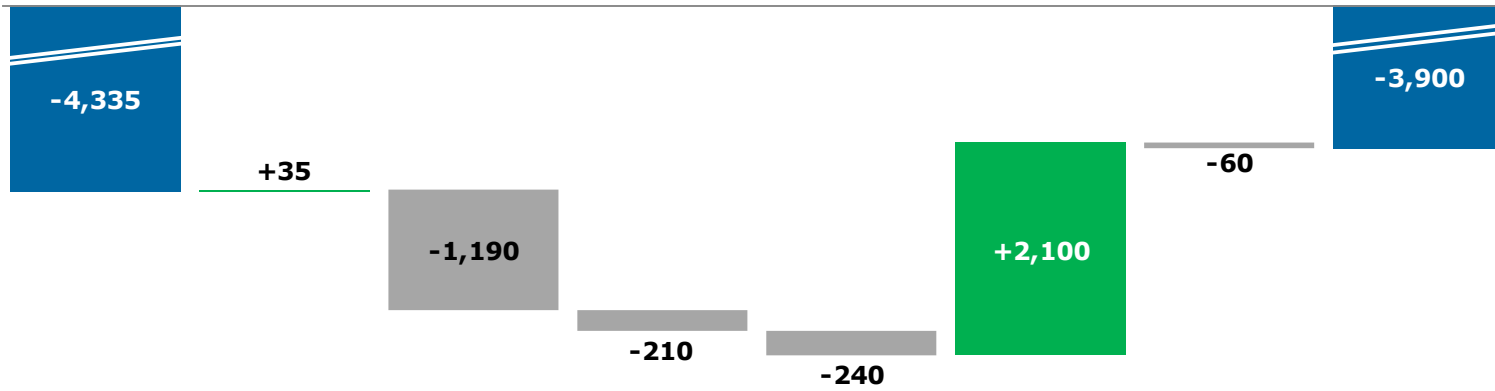
# 2014 pensions evolution related to interest rate drop, Bull scope, and exit from the Dutch Pension Fund *(in € million)*

**2014 annual results**  
February 18, 2015

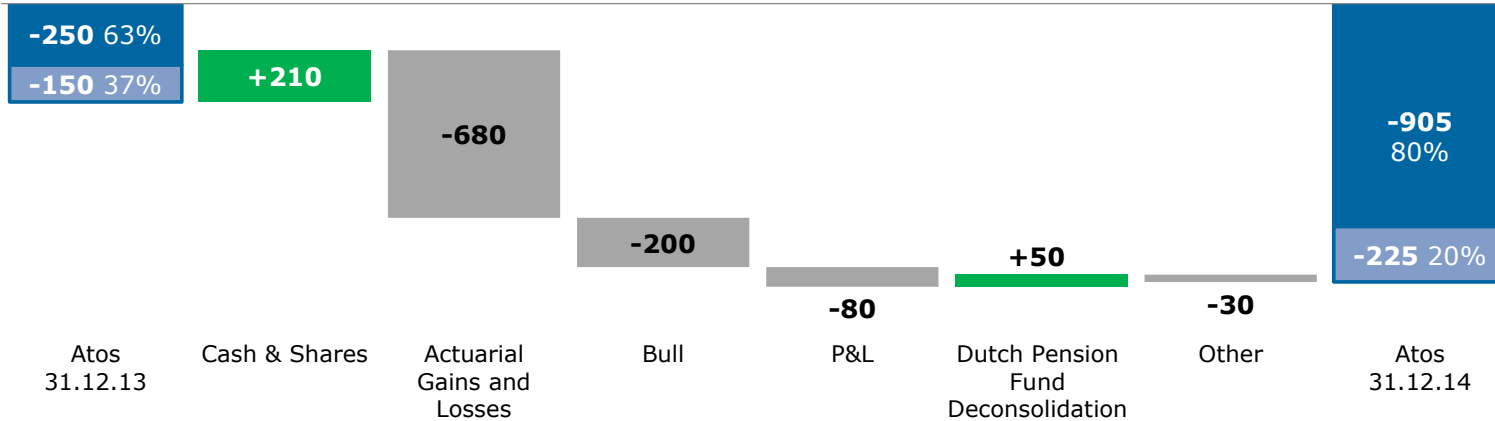
## Plan Assets



## Liabilities



## Balance Sheet



**Remaining funding obligation mostly in the UK**  
**Strategy in place to mitigate it**

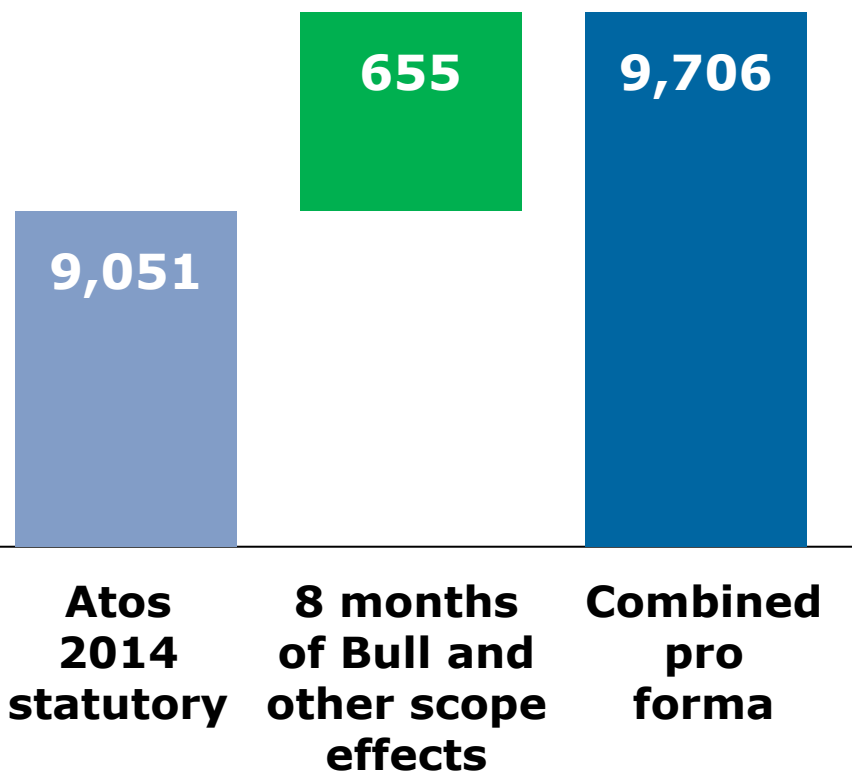
■ no funding obligation  
■ funding obligation

# 2014 revenue and operating margin estimated pro forma (in € million)

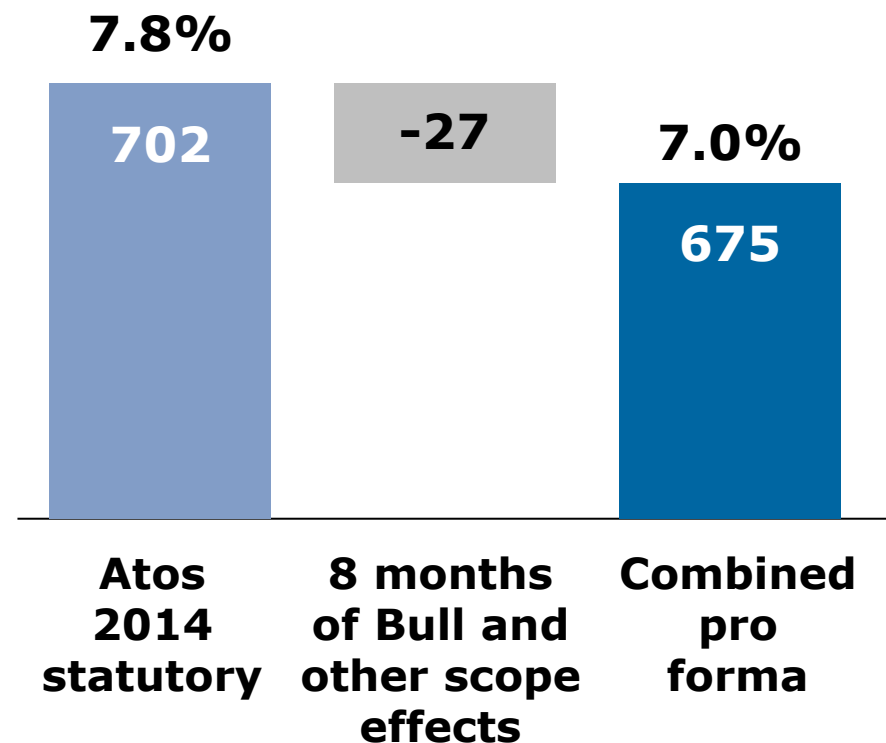
2014 annual  
results

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## Revenue



## Operating margin





Patrick Adiba,  
Executive Vice President and Chief Commercial Officer

## **Commercial activity**

# Order entry, backlog, and pipeline

2014 annual results

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## ► Order entry and book-to-bill

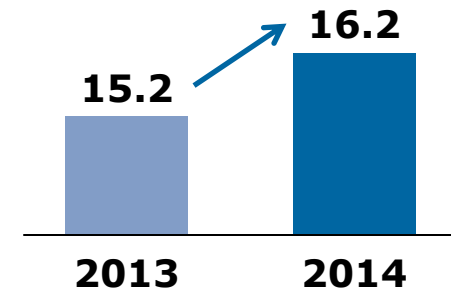
### By Service Line

	Order Entry	Book to bill
	FY 2014	FY 2014
Managed Services	4,523	99%
Consulting & Systems Integration	3,136	100%
Big Data & Cyber-security	342	143%
<b>Total IT Services</b>	<b>8,002</b>	<b>101%</b>

### By Market

	Order Entry	Book to bill
	FY 2014	FY 2014
Manufacturing, Retail & Transportation	3,354	110%
Public & Health	2,182	91%
Telcos, Media & Utilities	1,889	96%
Financial Services	1,688	102%
<b>Total Group</b>	<b>9,113</b>	<b>101%</b>

## ► Full backlog Group (€bn)



## ► Full qualified pipeline Group

**€ 5.5 billion**  
6.8 months of revenue

# Q4 main wins by vertical

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2014 annual  
results

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## Manufacturing, Retail & Transportation

- ▶ **K+S** (Germany): **MS** – IT outsourcing (new logo)
- ▶ **A large retailer** (France): **SI** – Service center (renewal)
- ▶ **PWC** (France): **MS** – Digital transformation with a Cloud component (extension of scope)
- ▶ **Volkswagen** (Brazil): **SI** – Application Management (new)
- ▶ **Symrise** (Germany): **SI** – Storage operations (renewal)

## Public & Health

- ▶ **Ashgabat Olympic Complex** (CEE): **SI** – ICT Design
- ▶ **European Commission** (Benelux): **MS** – Office automation (renewal)
- ▶ **French national railway**: **SI** - Infrastructures, network, & application delivery (new)
- ▶ **Immigration Department** (CEE): **SI** – Implement, deliver & maintain eGates
- ▶ **CEA** (France): **BD&S** – HPC infrastructures and services (new)
- ▶ **Ministerio de Ciência Tecnologia & Inovação** (Brazil): **BD&S** – HPC infrastructures and services (new)

# Q4 main wins by vertical

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## Telcos, Media & Utilities

- ▶ **Microsoft** (North America, Asia & Latin America): **MS** – Data center services (new)
- ▶ **EDF** (France): **WL** - Multi-channel solutions (new)
- ▶ **Orange** (France): **SI** – Service Platform Integration Services (renewal)
- ▶ **Telecom Italia** (CEE): **SI** – Maintenance and IT Services (new)
- ▶ **Capital IQ** (North America): **MS** – Storage and Data centers operations (new)

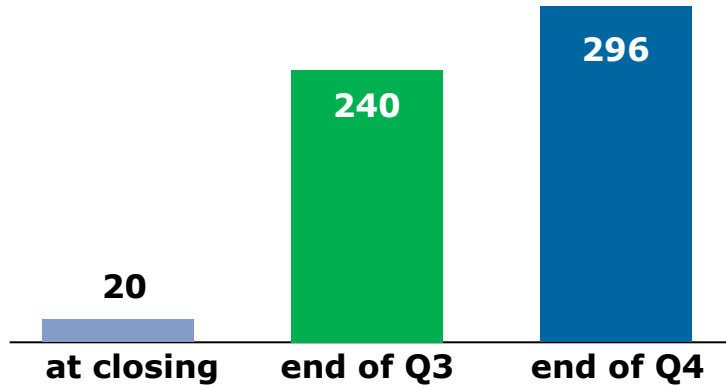
## Financial Services

- ▶ **NS&I** (UK): **MS** – Design, build, test and implementation of infrastructure(new)
- ▶ **Leading Banking Group in Spain**: **SI** - Application Management (new)
- ▶ **Two leading Belgium bank**: **WL** – Card issuing and processing (renewal)
- ▶ **A large Euro-bank** : **WL** – Credit card issuing and processing (renewal)

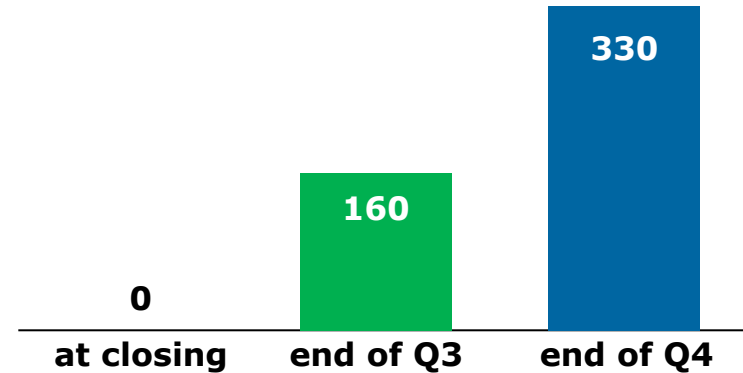
# Bull integration: update on revenue synergies actions

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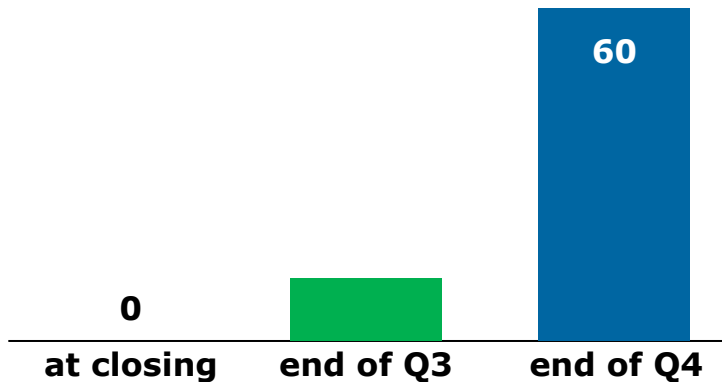
### Top clients visited



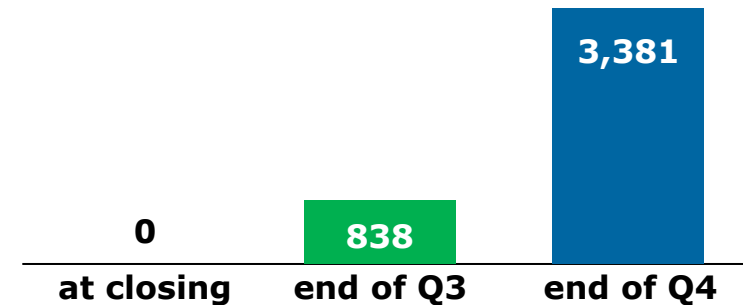
### Business identified (€m)



### Business won (€m)



### Sales people trained to cross-sell Atos/Bull offers

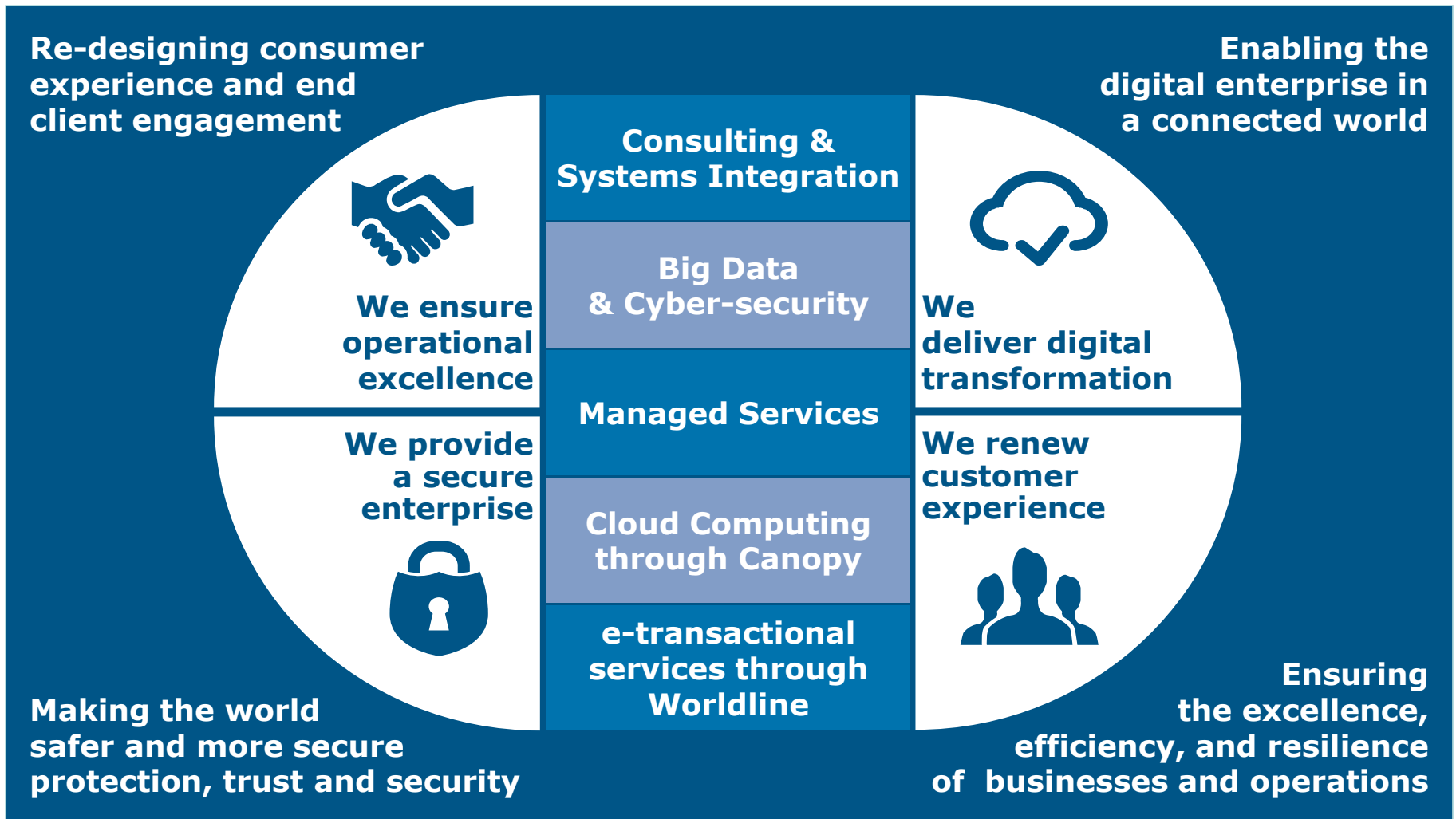


- ▶ **Fertilization as a strong growth engine. Many of our Customer are still served by only one service line.**
- ▶ **Sales targets / Incentives** fully aligned with the fertilization targets
- ▶ **>110 expert sales** positions have been created in order to increase the ability to understand and resolve the customer challenges
- ▶ **Training** on sales and offerings (cross Service Lines)
- ▶ **Opportunity Assessment** tool has been developed for major portfolio items :
  - Assessments undertaken on 300 accounts
  - 15,000 leads identified
  - 4,000 qualified lead for pipeline
  - Win rate for fertilization deals 88% (increase from 84% in 2013)
- ▶ The new **Bid factories** handled over 8,500 proposals with value of more than €550 million
- ▶ **Rapid growth board**: generate pro-active offers to anticipate on the demand

# Digital empowerment leveraging compelling competencies & technologies

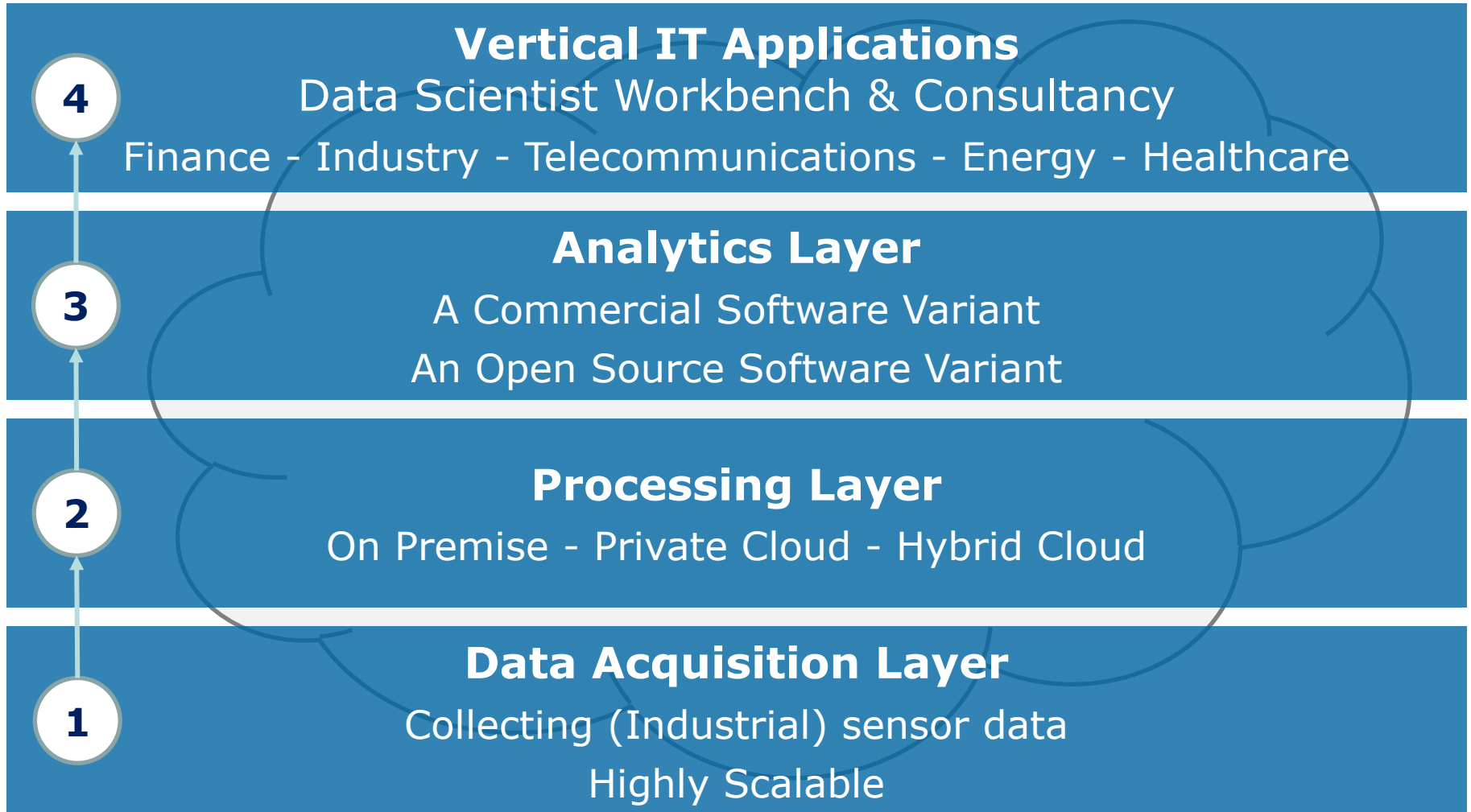
2014 annual results

February 18, 2015



# Atos and Siemens jointly invest in Industrial Data Analytics and Big Data

2014 annual results  
February 18, 2015





Charles Dehelly,  
Senior Executive Vice President, Global Operations

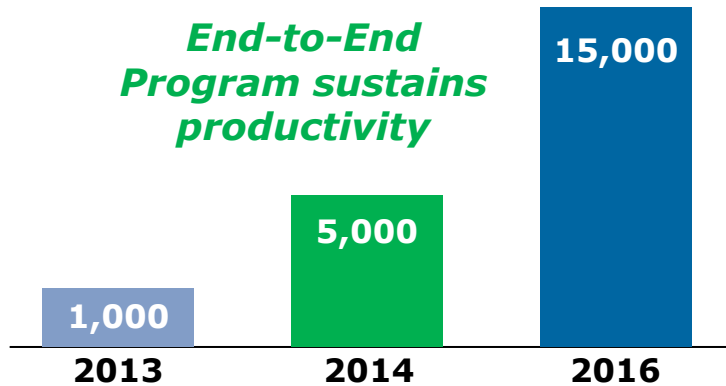
## **Top Tier One Program and integration streams**

# Continuous progress to deliver Atos 3-year plan targets

2014 annual results

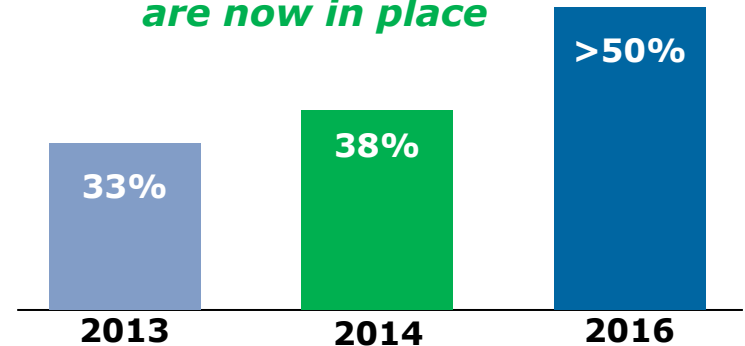
February 18, 2015

## End-to-end coverage in FTE (Managed Services + Systems Integration)

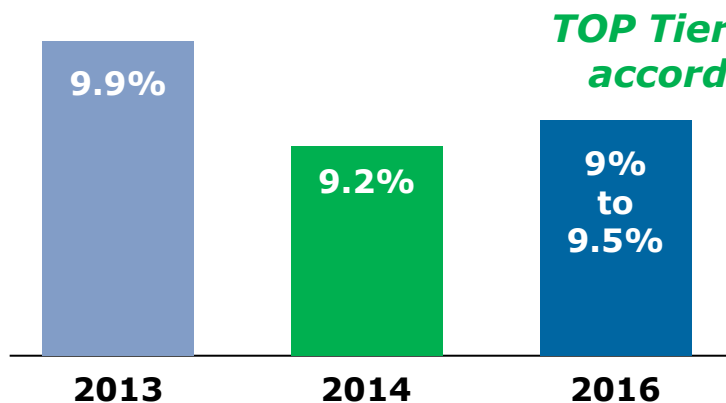


## Systems Integration offshore ratio

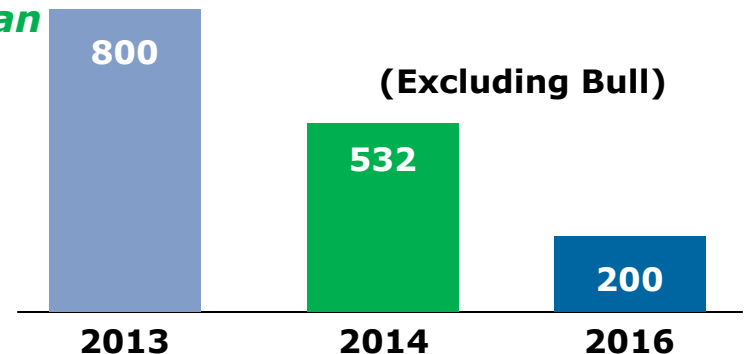
*META Program basics are now in place*



## SG&A as % of revenue



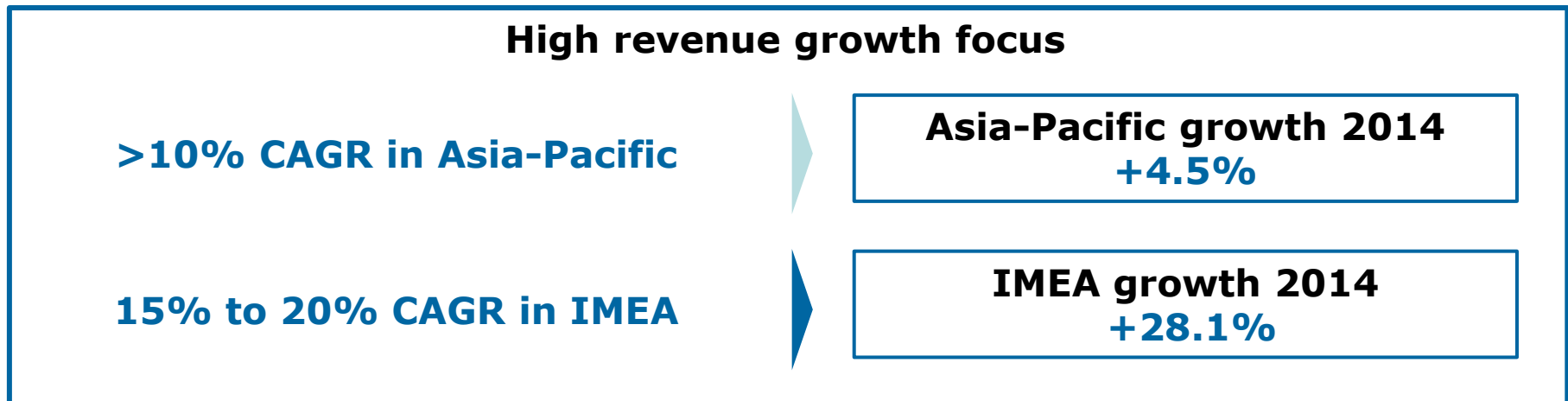
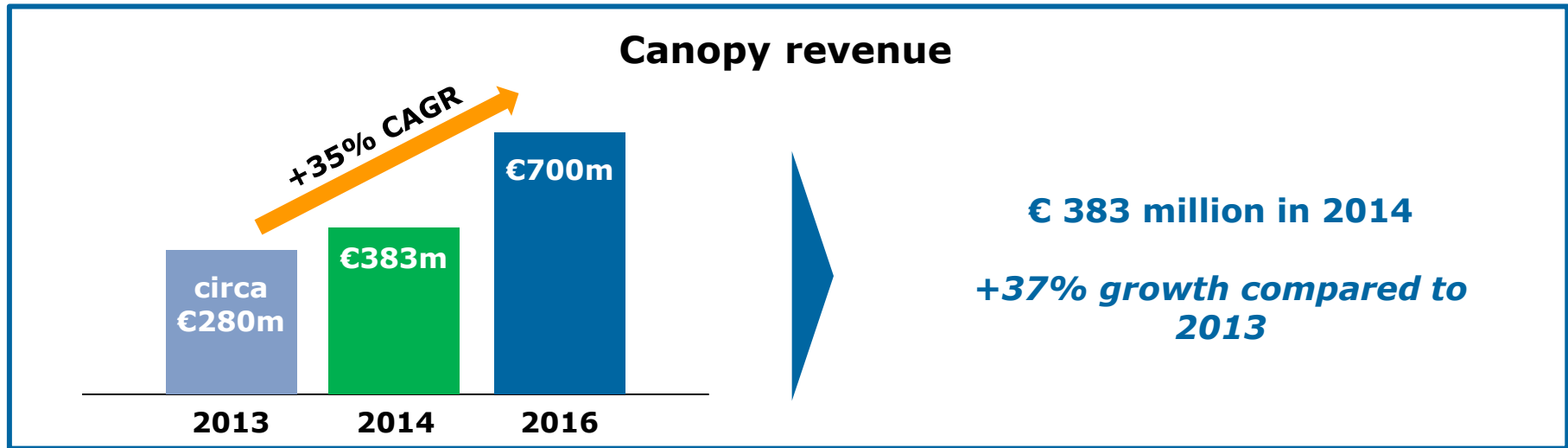
## Number of vendors representing 80% of purchasing



# Organic growth delivered in selected areas as per 2016 Ambition

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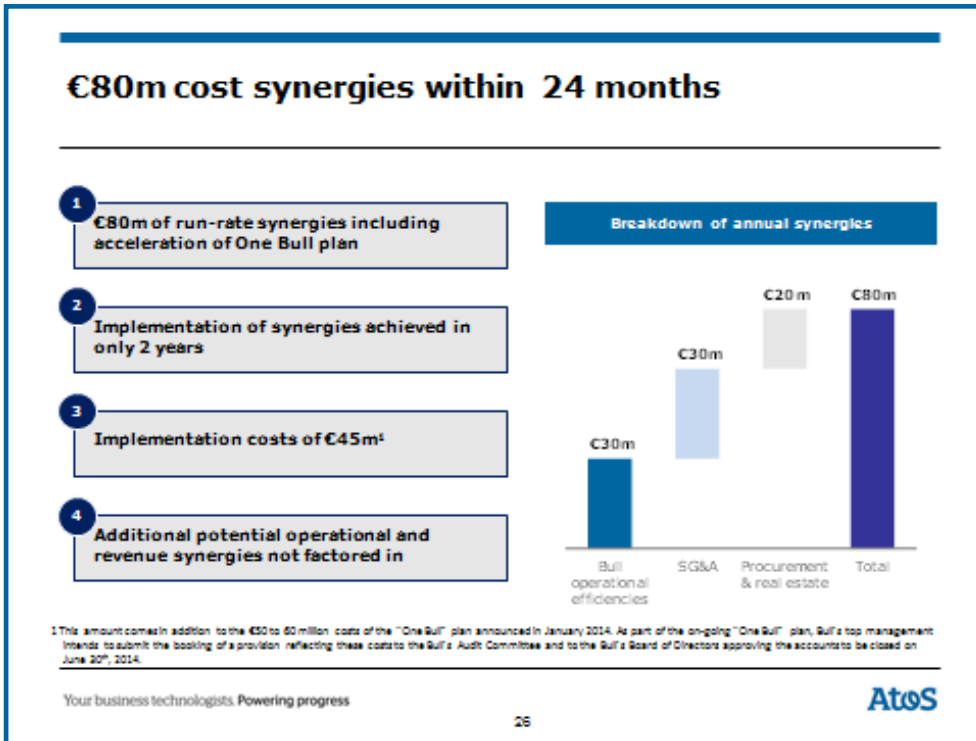


# Increased Bull synergies and accelerated roadmap

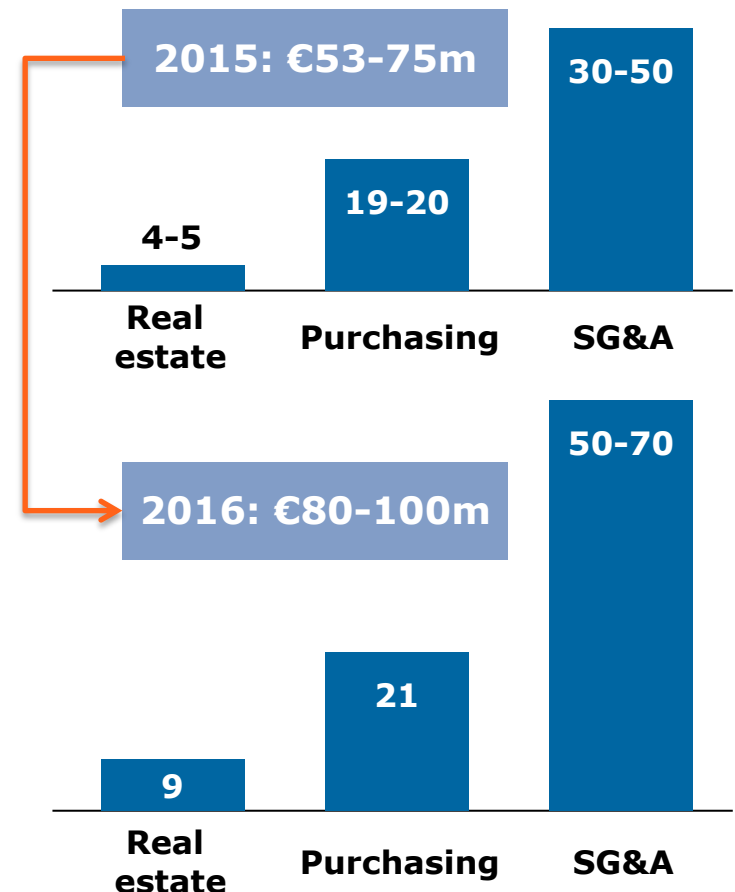
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Reminder:



## Breakdown of Bull integration synergies (€m)



## Breakdown of Bull integration costs



# All the Bull transaction objectives have been successfully achieved in 2014

**2014 annual results**

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Reminder:

## A transaction fully in line with 4 key Ambition 2016 Atos objectives

- |   |   |   |
|---|---|---|
| 1 | Enhance European #1 position in Cloud services in Europe  | ✓ |
| 2 | Anchor Atos global leadership in Managed Services   | ✓ |
| 3 | Bring to market disruptive and innovative offerings and pursue strategic partnerships with technology leaders | ✓ |
| 4 | Acquisitions with financial discipline in specific geographies and segments                                   | ✓ |

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7

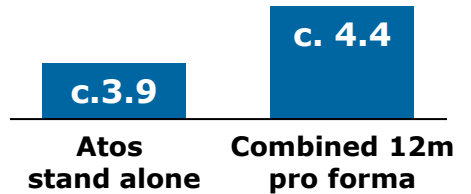
## Enhanced position in Cloud

\* Based on 12 months contribution of Bull in 2014

- ▶ +37% revenue growth in 2014 for Canopy stand alone
- ▶ +45% revenue growth in 2014 thanks to Bull contribution\*

## Increased leadership in Managed Services

Revenue in € billion

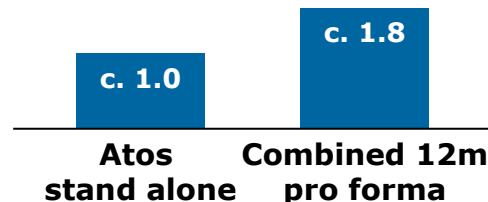


## Strong technological assets

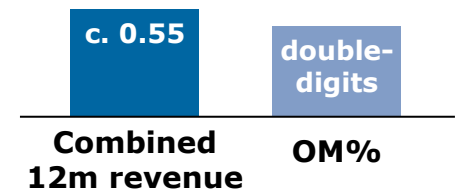
- ▶ 1,600 patents registered
- ▶ billion amongst best in-memory servers for analytics and big data technologies such as SAP HANA

## Consolidated positions in France and creation of a growing and accretive new Service Line

France revenue (€bn)



Big Data & Cyber-security (€m)

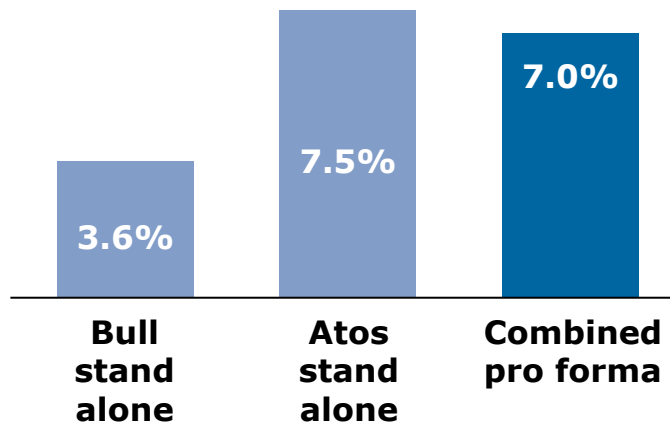


# Atos with Bull to deliver according to 2016 Ambition

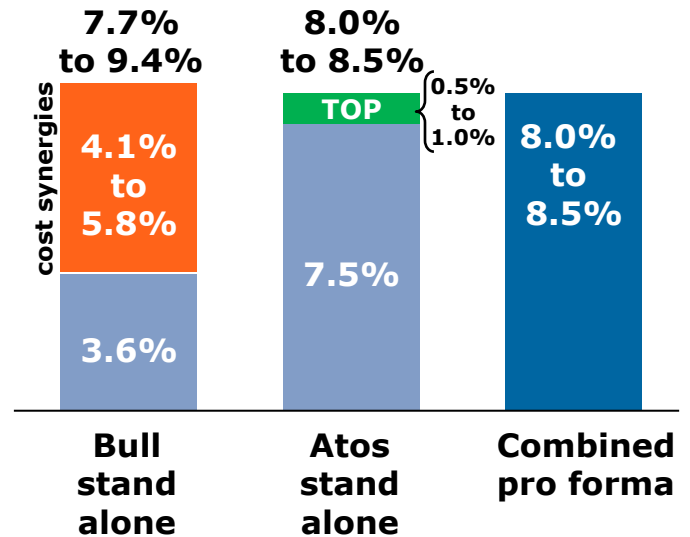
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2013 operating margin



2015e operating margin



Catch up of Bull profitability to Atos level through synergies

# Xerox ITO acquisition process

A 2 steps approach based on Atos proven methodology

2014 annual results

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Between signing and closing

From closing onward

## Carve-Out

Work stream weekly steerco: **Xerox leads**

- C01** IS separation
- C02** Network & Security
- C03** Real Estate
- C04** Soft/hardware, Xerox IP, and other vendor contracts
- C05** TSA
- C06** People transfer
- C07** Legal restructuring
- C08** Client consent

## Closing

Work stream weekly steerco: **Xerox leads**

- CL1** Antitrust & Conditions precedent
- CL2** Monthly performances review (OE/ER/OM) vs Plan
- CL3** Interim governance
- CL4** Tax / Section 197
- CL5** MOSA / PCV
- CL6** Finance items / Equipment Leasing

## Joint transversal for Day 1 readiness

Work stream weekly steerco: **Atos leads**

- I1** Sales  
Atos/XBS/ XIT working process  
Training & account plan
- I2** Purchasing datas preparations  
Managed Services master plan
- I3** High level DC plan; Blue print GDC; Go forward  
Capex/Technology/Tooling
- I4** Big Data and Security offer/org.
- I5** Systems Integration offer/org and GDC optimization (process training)
- I6** Cloud / Canopy offer/org
- I7** Financial & HR operations
- I8** Communication & Talents (Social process pre closing)
- I9** Country specific items

## TOP work streams

Monthly review

TOP Sales	<b>T1</b> Quality/customer satisfaction
	<b>T2</b> Project margin improvement
TOP Efficiency	<b>T3</b> SI industrialization
	<b>T4</b> MS industrialization
	<b>T5</b> IT process standardization
	<b>T6</b> Utilization rate optimization
TOP Indirect	<b>T7</b> Finance optimization
	<b>T8</b> HR optimization/WFM
	<b>T9</b> SG&A optimization
	<b>T10</b> Real Estate optimization
	<b>T11</b> Standard of living
TOP Cash	<b>T12</b> WIP/CAPEX

## Post Closing

- PCL1** Debt, WC, Deferred assets
- PCL2** Open contract items
- PCL3** Legal restructuring
- PCL4** MOSA

For information purpose only and in compliance with competition rules

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Thierry Breton, Chairman & CEO

## **Conclusion**



# A world of global partnerships

Solid and long-term strategic partnerships with technology leaders

2014 annual results

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## Enhanced Alliance

The diagram illustrates the formation of Canopy. At the top, the logos for Atos, EMC<sup>2</sup>, VMware, and VCE are displayed. A large black arrow points downwards from these logos to the Canopy logo. Below the Canopy logo, it reads "THE OPEN CLOUD COMPANY" and "Powered by Atos, EMC<sup>2</sup> and VMware". At the bottom, it states "Innovative and long-term committed Alliance".

## Global Strategic Alliances

A collection of logos representing global strategic alliances. The logos include Microsoft (four colored squares), SAP (white text on a blue triangle), Samsung (white text on a blue oval), Citrix (black text with a dot), Oracle (red text), Yonyou (red text), and OpenStack (red 3D cube with white text).

## Global Strategic Cooperation with Siemens

# SIEMENS

Bring innovative IT solutions to BtoB markets through global strategic cooperation

**Global and solid partnerships with leaders investing massively and on a long-term basis**

# Atos DNA: Excellence in Corporate Responsibility

2014 annual results

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- ▶ **Atos member of the Dow Jones Sustainability World, FTSE4Good and Ethibel Excellence Indexes** demonstrating corporate responsibility leadership in the IT sector
- ▶ **Achieved for 3<sup>rd</sup> year running highest GRI qualification** for its Corporate Responsibility Integrated Report for extra-financial reporting. **AA1000 compliant** on best practices handling Stakeholders expectations.
- ▶ **Member of the Carbon Disclosure Leadership Indexes** confirming strong commitment on Carbon management and reduction targets.
- ▶ **Improving scoring as Responsible IT supplier** assessed by an external company and showing advancement in sustainable procurement practices.
- ▶ More employees participating in **Social initiatives** and saying that Atos is a **Great place to work**.
- ▶ Developing strong organizational and security measures to guarantee high level of personal **Data protection** to Atos employees and clients.
- ▶ **Highlighting Atos' offerings contribution to the sustainability excellence in clients** (e.g. lowering the footprint of operations, energy efficiency, collaborative working, connecting vehicles, forecasting climate, securing patient information, etc.)



# A transformational year for Atos

## 3 transactions matching all Ambition 2016 objectives

2014 annual results

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	Xerox ITO	Bull	Worldline
▶ Expand Atos foothold in the US	✓		
▶ Anchor Atos global leadership in Managed Services	✓	✓	
▶ Increasing Cloud position	✓	✓	
▶ Reinforce growth and profitability in Systems Integration		✓	
▶ Grow through customer focus, new offerings & partnerships	✓	✓	
▶ Provide strategic flexibility to Worldline to anchor its leadership in Payments			✓

# Key takeaways and 2015 priorities

2014 annual  
results

February 18, 2015

**2014:** a year of accelerated transformation



**Sales  
reorganization**



**Solid financial  
structure**

## Top priorities for 2015:

**1** Boost revenue  
with our clients  
through innovation,  
partnerships and  
state-of-the-art  
technologies

**2** Consolidate  
and develop Atos  
platform in the US

**3** Strategic  
development  
of Worldline

→ 3-year plan **2016 Ambition** well on track

Management team

## **Q&A session**

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# From Questions to Answers

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## Thank you

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