

- » BOOST PERFORMANCE
- » REDUCE COST
- » INCREASE AGILITY
- » ENHANCE CRM
- » SHORTEN TIME TO MARKET
- » DRIVE INNOVATION
- » IMPROVE EFFICIENCY
- » INCREASE ADAPTIVITY
- » ENABLE BUSINESS TRANSPARENCY
- » ENSURE REGULATORY COMPLIANCE



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Global SAP Business From Old to New World SAP

Iain Boag
Group Senior Vice President Enterprise Solutions and Strategic Partnerships
December 2007

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Global SAP Strategy & Capability

SAP Strategy 2008 – 2010



Business development

- » **MMT (Maximize Manufacturing Together)** : effort to be increased and **COE (Centre of Expertise)** concept expanded to additional sectors e.g. Banking
- » **Ramp up the industrialization for ERP Upgrade**
- » **Alliance to Win** - Some possible areas:
 - » Banking
 - » Nuclear power
- » Determine Atos Origin's entry into Business ByDesign formerly A1S
- » Increase resources and abilities in Application Management
- » Align with Atos Origin goal in Asia e.g. China & India

Sales Support & Knowledge sharing

- » SAP TCC evolution
- » Training

Global Practice management

- » **Recruitment and Retention** – SAP estimate 50,000 shortage by 2010
- » Requires employee and market identity

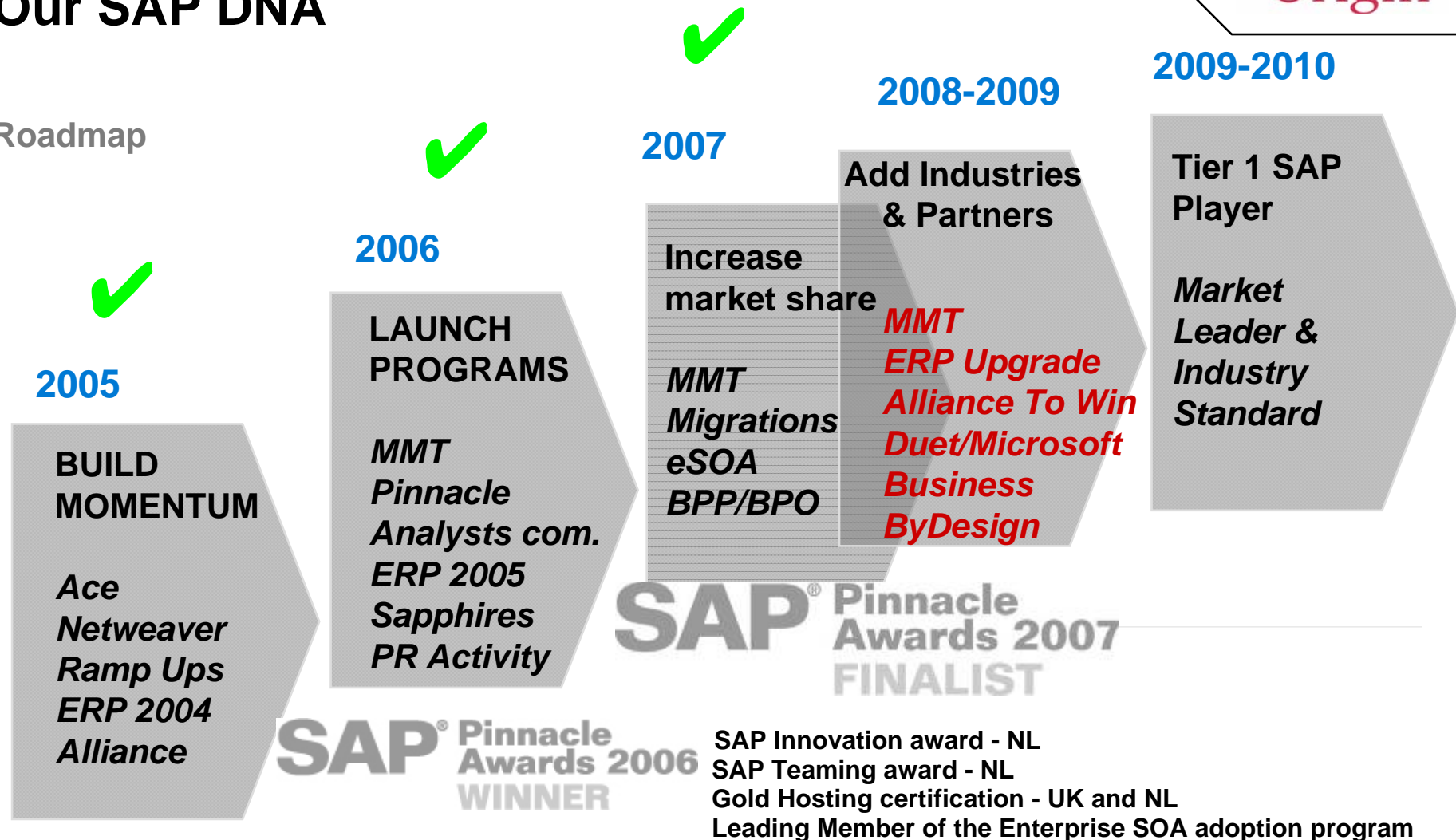


SAP Strategy 2008 - 2010



Our SAP DNA

Roadmap



Increase MMT and COE scope and expand the relationship & Industries

Atos Origin target markets



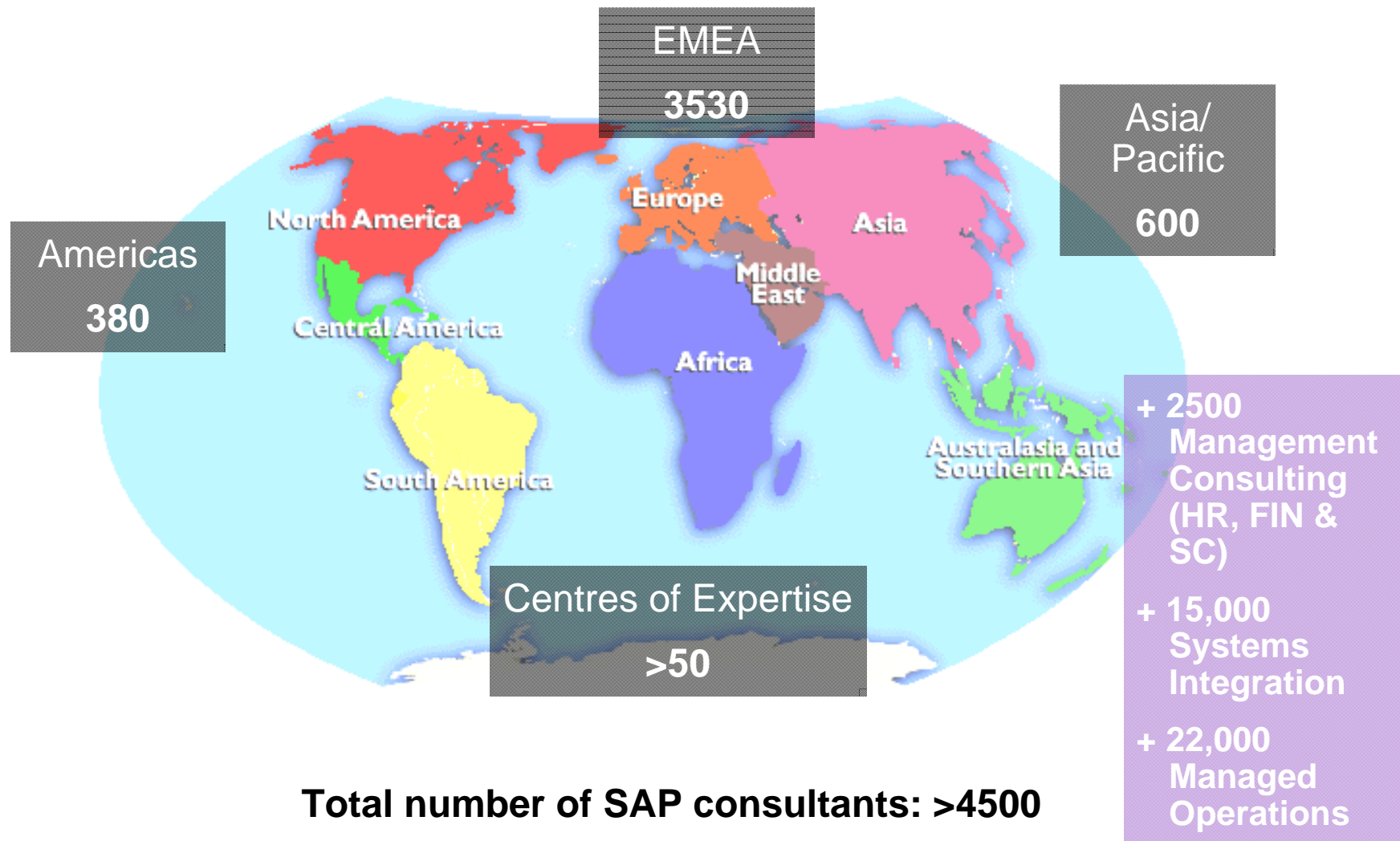
LARGE	SAP Business Suite including SAP ERP 6.0	> 2,500 employees	~ \$30 billion market
	SAP Business All-in-One	< 2,500 employees	~ \$15 billion market
MIDSIZE	SAP Business ByDesign*	100-500 employees	NEW BUSINESS ~ \$15 billion market
	SAP Business One	< 100 employees	~ \$15 billion market

***Market under evaluation**

SAP Capability



We have SAP resources throughout the world



Total number of SAP consultants: >4500

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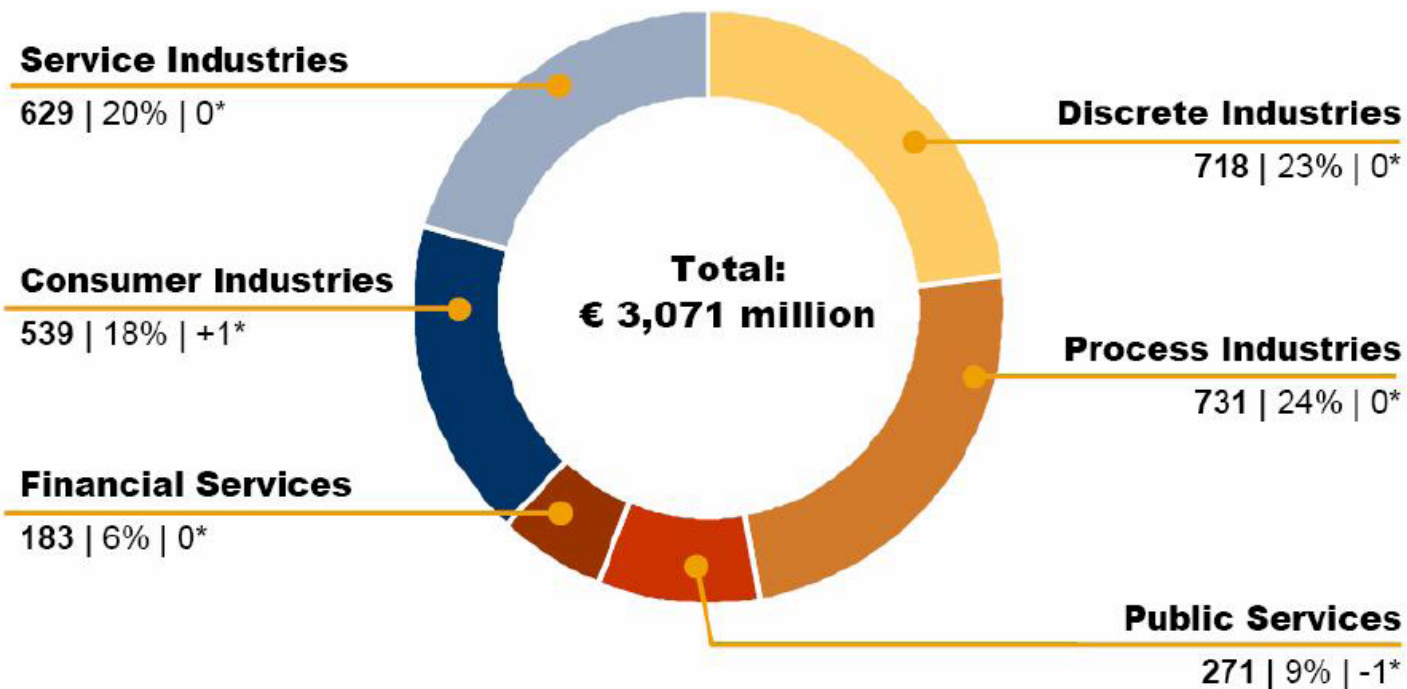
MMT - Maximize Manufacturing Together

The SAP Manufacturing market



Software Revenue by Industry – Full Year 2006

in € million | in percent of software revenue | change compared to FY 2005



* in percentage points

© SAP AG 2007 - SAP's Industry Strategy, Nils Herzberg

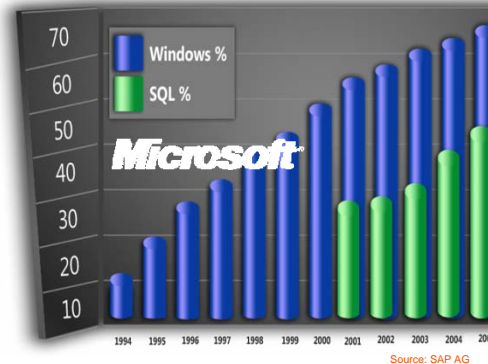
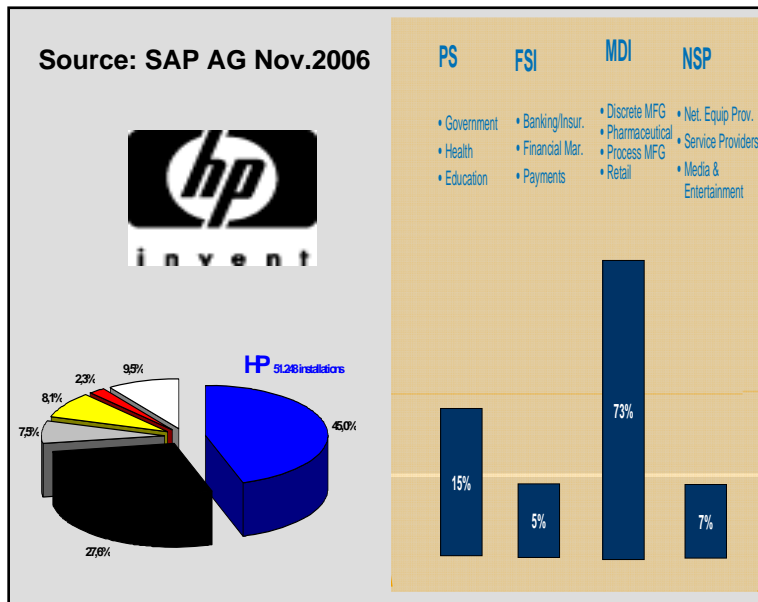
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THE BEST-RUN BUSINESSES RUN SAP™

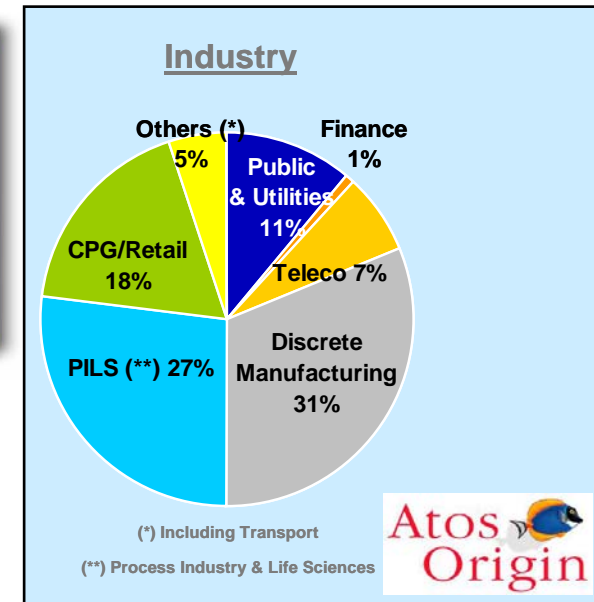


- 65% revenue in manufacturing
- €16-20bn estimated associated SAP services

Market Position in the SAP world



- » Leading Operating System for the last 5 years
- » Over 43,000 SAP installations on Windows Server (>53% of all SAP installations)
- » 65% of new SAP installations on Windows, 41% of all on SQL Server (as of CY2005)



Automotive Industry

Supplier Solution (9 / Top 10)

OEM Solution (10 / Top 19)

Sales & Service Solution (5 / Top 10)

CP Industry

90+% of the largest companies



High Tech Industry

- » **Semiconductors**
9 out of the Top 10 companies run SAP
- » **EMS Providers**
4 out of the Top 5 companies run SAP
- » **OEMs**
5 out of the Top 10 companies run SAP
- » **Software & Services**
7 out of the Top 10 companies run SAP

Chemical Industry

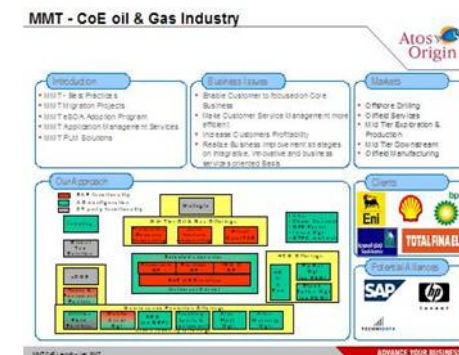
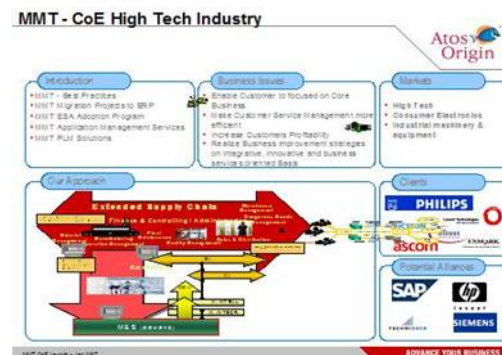
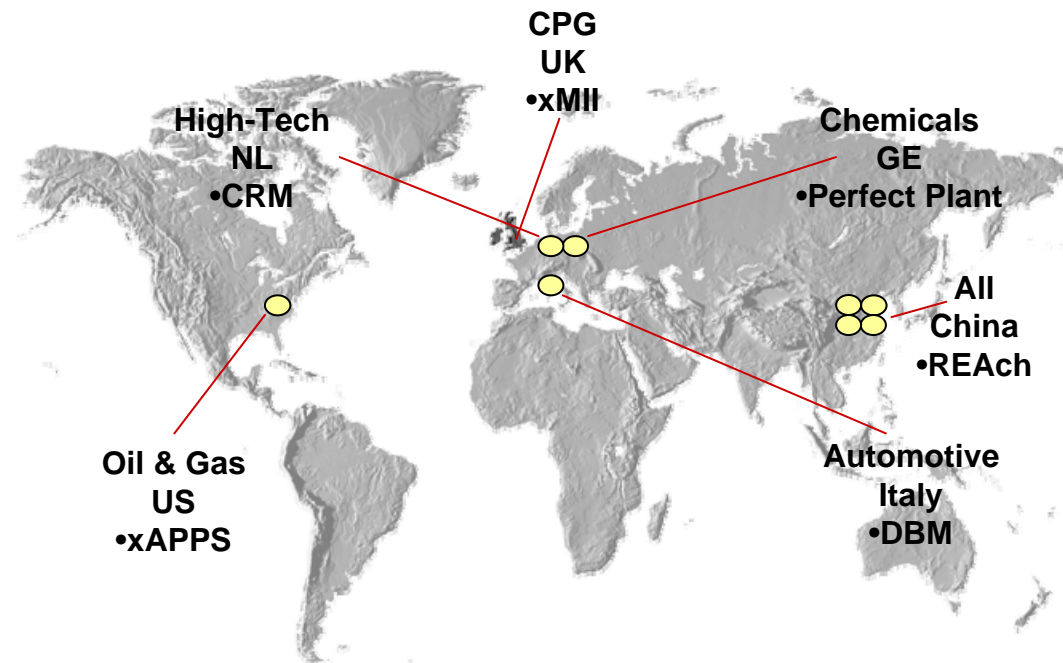
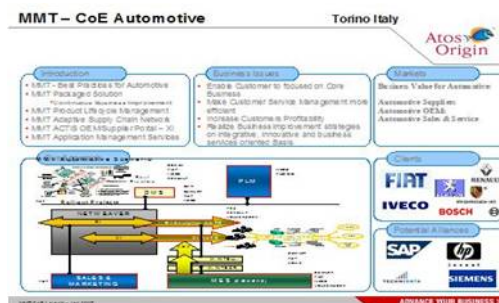
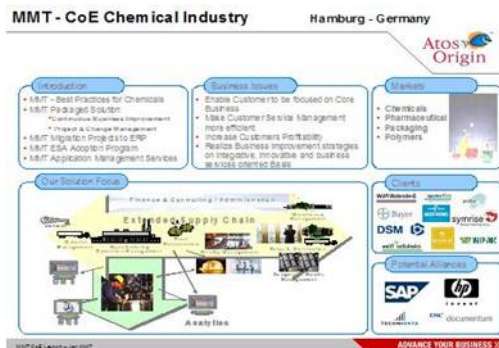
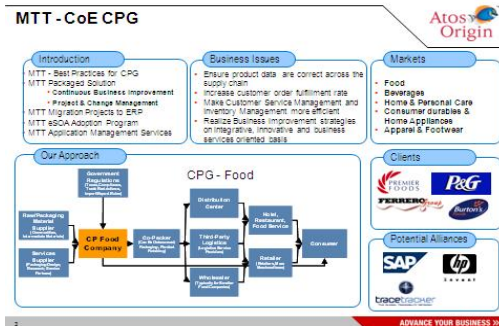
99% of the 500 largest companies

Oil & Gas Industry

More than 500 companies and 500,000 Oil & Gas users



... and CoEs around the world

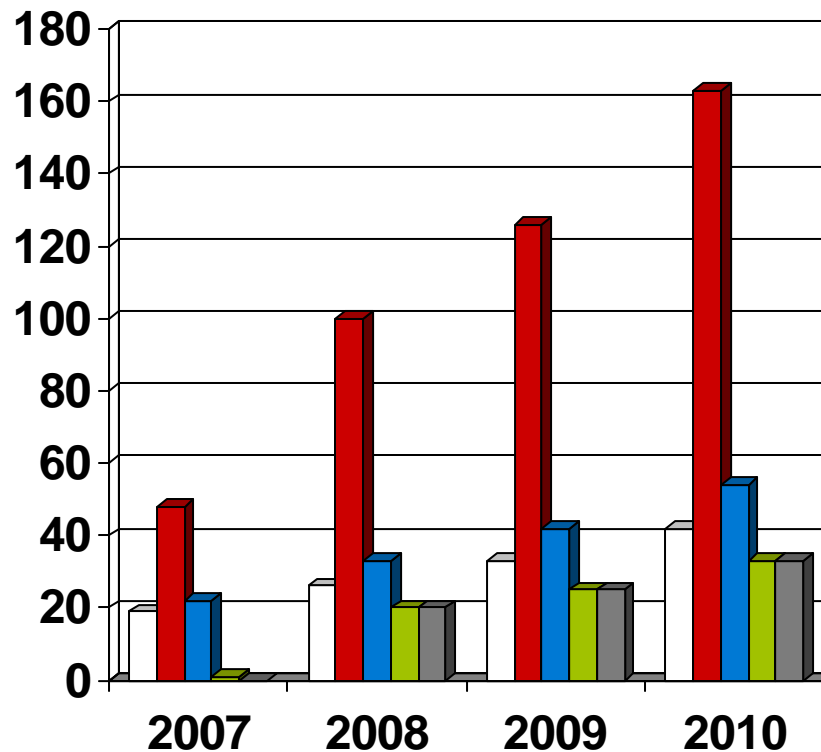


Atos Origin Opportunities

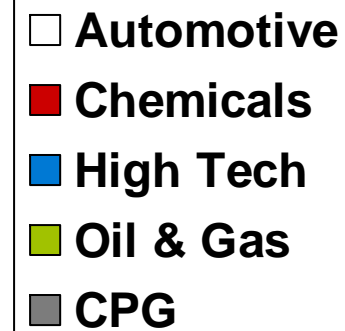


Rationale for developing the solution

€m



MMT revenue forecast



CAGR assumption

25%

30%

CHEMCHINA 中国化工



IVECO



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Move Programme

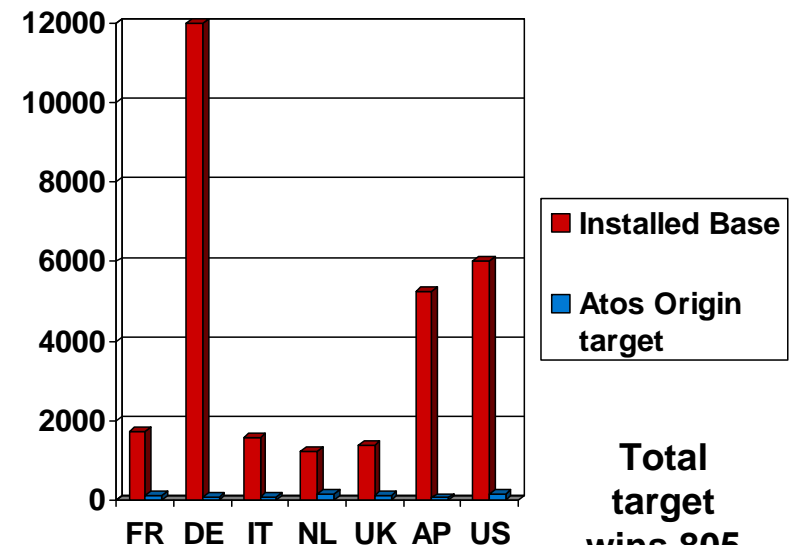
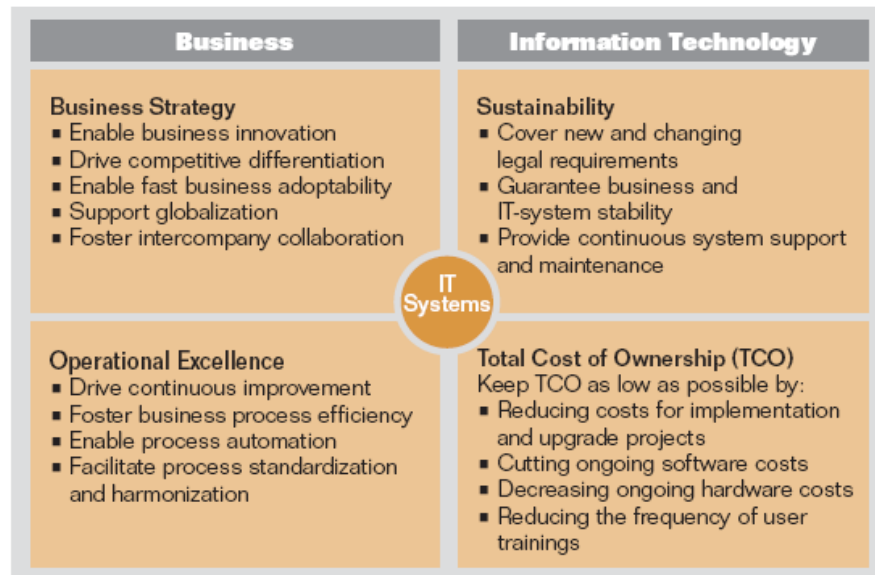
ERP Upgrades

The Upgrade Opportunity



SAP ERP 6.0 Improves the Business

A unique opportunity to deploy Atos Origin's ACSIMO Design/Build/Operate model



Total target wins 805 (2.75%)

Atos Origin Revenue opportunity 2008/9 €233m (technical upgrades) + functional upgrade/business process improvement (to be determined)



Atos Origin Positioned as the Trusted Advisor



SAP Upgrade Services at a pace geared to the business

- » Complete set of services to support all three categories of upgrade project: Technical, Functional and Strategic
- » A “continuous” upgrade approach to business improvement and innovation with the focus on Functional and Strategic

Atos Origin Differentiators

- » Standard services, tools, processes globally
- » **Upgrade Best Practice**
- » **Packaged Upgrade Services:**
 - » Awareness
 - » Assessment
 - » Technical Upgrade
 - » Optimisation
 - » Strategic Upgrade
- » **Upgrade Evaluation Tool**
- » **Upgrade Cost Estimator Tool**
- » Tooling beyond SAP's tools
- » **Onshore/Nearshore/Closethore/Offshore Sourcing**
- » Comprehensive Training Program
- » Experienced Upgrade Project Coaches
- » Global Upgrade Collaboration Community
- » **Global SAP Technical Competency Centre and Test Factory**
- » Global Upgrade Knowledge Base Repository
- » **Global Centres of Excellence for Industry Best Practice**

SAP ERP 6.0 Upgrade Status 2007			
	Upgrade Projects Completed	Upgrade Projects being Executed	Upgrade Projects being Engaged
Total	47	22	136

- » White paper - SAP Enterprise SOA: Win or Lose?
- » Member of SAP Business Process Management (BPM) Design Partner Council
- » Examples of eSOA client work:
 - GDF
 - D:Group
 - Piaggio
 - Swisscom
 - Symrise
 - BP
 - E Plus

The Atos Origin enterprise architecture methodology has evolved in the past decade and focuses on high-level “city planning” rather than the detailed blueprints many of its competitors advocate. This approach also has a strong emphasis on enterprise architecture governance processes and is supported by a range of standard planning tools.

Derek Prior – “Choosing a partner for building a SAP service oriented architecture” October 2007

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Alliance to Win

Banking & Payments

SAP: Alliance To Win



Atos Origin is invited to become the 3rd Global Services partner to design a joint strategic roadmap with SAP.

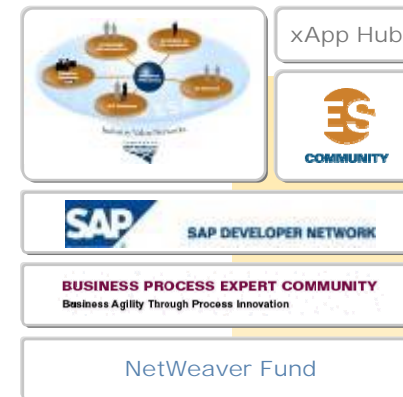
The program will require significant investment from both parties in terms of executive commitment (on country and global levels) and in terms of money.

The win-win business cases will be defined in a workshop. The result of this workshop will have to be endorsed by both Management Boards in 2008. Initiatives considered in priority order are:

Banking & Payments

Nuclear Power

Communities and networks support innovation



Enabling Services for Value



Systems Integrators

Banking & Payments

Strategic solution focus

- » SAP Banking as key package software for Core Banking and ERP

Key enabler

- » >2500 employees engaged on Banking & Payments together with established SAP capability >4500 as a basis for delivery and commitment to scale up including Asia (China)
- » Significant banking client base, which Atos Origin will influence
- » Complementary products & services
 - Previous Atos alliances and solutions which might have conflicted are now terminated
 - Atos Worldline for card payment services and software
 - Consulting, SI and MO i.e. full service provider
- » Differentiators
 - Self-service banking expertise
 - Payments and SEPA focus
- » Thought leadership
 - Governance, risk & compliance e.g. Basel II, MIFID etc
 - Next generation CRM
- » Intellectual Property e.g. Product Process Templates

Next steps

- » Assess potential core banking market in more detail
- » Refine the Atos business case in terms of geographies
- » Scale up the Centres of Expertise and transition existing people



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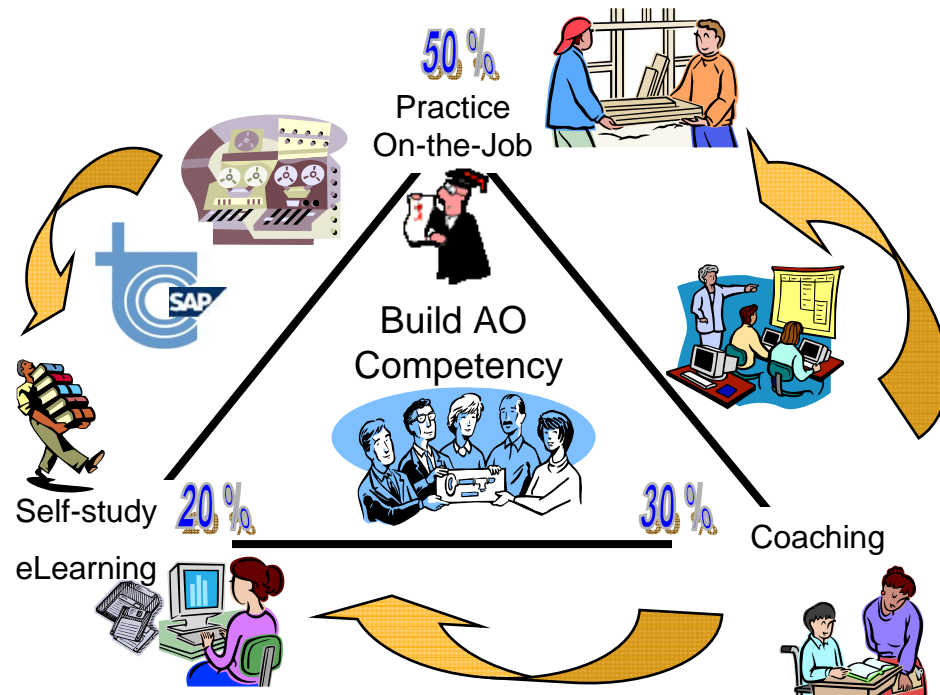
Underpinning the growth

SAPcc - ACE Programme



Benefits of Accelerated Consultant Education

- Retain and attract SAP Business Consultants
- Offshore to onshore (LTA)
- Flexibility to adapt to Atos Origin specific requirements
- Ability to add Atos Origin specific knowledge-share to materials
- Reduce time away from job for consultants through consolidated, customized training
- Large Cost Saving
- Increase Atos Origin Level of SAP Certification
- Train the Trainer Concept – knowledge spread
- Expertise in-house



Conclusions



- » **SAP is the number 1 in enterprise applications (>27%)**
- » **SAP's double digit licence growth is sustainable**
- » **Atos Origin is committed to SAP and Manufacturing**
- » **We will capitalise on additional SAP opportunities in:**
 - **ERP upgrade**
 - **Banking**
 - **New geographies and markets**
- » **Atos Origin has rapidly adopted SAP's New World**