Third quarter 2013

Friday, October 25th, 2013
Disclaimers

- 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 2012 Reference Document filed with the Autorité des Marches Financiers (AMF) on April 3rd, 2013 under the registration number: D13-0271 and its update filed with the Autorité des Marchés Financiers (AMF) on July 31st, 2013 under the registration number: D13-0271-A01.

- Global Business Units include **Germany, France, United Kingdom & Ireland, Benelux & The Nordics** (The Netherlands, Belgium, Luxembourg, Denmark, Finland, Sweden, and Estonia), **Atos Worldline** (French, German, Belgian, Asian, and Indian subsidiaries), **Central & Eastern Europe** (CEE: Austria, Bulgaria, Croatia, Serbia, Poland, Czech Republic, Russia, Romania, Slovakia, Hungary, Switzerland, Italy, 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, and Chile), Asia Pacific (Japan, China, Hong Kong, Singapore, Malaysia, Indonesia, Philippines, Taiwan, Thailand, New Zealand, and Australia), India, Middle East (UAE, Qatar, and Saudi Arabia), Morocco, South Africa, and New Business Ventures (blueKiwi, Yunano and Canopy).

- Revenue organic growth is presented at constant scope and exchange rates.

- Adjusted (non diluted) Earnings Per Share (EPS) represents the net income adjusted of restructuring, rationalization and customer relationship amortization, net of tax, divided by the weighted average number of shares during the year.
Agenda

1. Highlights and 2013 objectives
2. Commercial activity
3. Financial performance
4. Focus on Worldline
5. Q&A session
Gilles Grapinet,
Senior Executive Vice President, Global Functions

Highlights and 2013 objectives
Q3 2013 Highlights

Third quarter 2013
25 October 2013

- **2,086**
  - Revenue (EUR million)
  - -1.8%
  - Rev. organic evolution

- **85%**
  - Book to bill ratio

- **5.4**
  - Pipeline (EUR billion)
  - (7 months of revenue)

- **15.1**
  - Backlog (EUR billion)
  - (1.7 years of revenue)

- **21**
  - Free cash flow (EUR million)

- **353**
  - Net cash (EUR million)

- **77,080**
  - Total Group number of employees
With revenue expected nearly stable compared to 2012, the Group maintains the ambition to reach its objectives as stated in the February 21st, 2013 release, i.e.:

**Operating margin**
- The Group has the objective to improve its operating margin rate to around 7.5 percent of revenue compared to 6.6 percent in 2012.

**Free Cash Flow**
- The Group has the ambition to achieve a free cash flow above EUR 350 million.

**Earnings per share (EPS)**
- The Group ambitions an EPS (adjusted, non diluted) representing an increase of +50 percent compared to 2011 statutory (up +25 percent compared to 2012).
Gilles Grapinet,
Senior Executive Vice President, Global Functions

Commercial activity
Order entry and book to bill

- Total order entry in Q3 2013 at EUR 1,780 million

- Book to bill ratio
  - Q3 vs. Q4:

- Full weighted pipeline at EUR 5.4 billion
Backlog evolution (in EUR billion)

Total backlog at EUR 15.1 billion at the end of September 2013

Managed Services

HTTS & Specialized Businesses

Systems Integration

Consulting & Technology Services

Backlog to revenue* (in number of year)

* Figures reported to 2012 revenue at September 2013 exchange rates
Manufacturing, Retail & Services

- **Elopak**: MS - Outsourcing contract in Norway (new logo)
- **Volkswagen** (Latin America): MS - Datacenter, Network and Service Desk
- **Adidas**: HTTS - Global Virtual Footwall solution as part of Atos partnership with Samsung
- **Daimler** (North America): SI/MS - Renewal and extension for AMS, SAP deployment, and Managed Services

Public sector, Healthcare & Transport

- **UK Post Office**: MS/SI - Service integrator and Service desk
- **UK Ministry of Justice**: MS - Future IT Supply
- **Polish Region Podkarpackie**: MS/SI - eAdministration system
- **City of Toronto**: SI - 2015 PaNam Games hosting city – TSR & Test events
- **NHS**: MS - Managed Services
- **Ministry of Defense** (Switzerland): SB - Air Traffic Control Support
Q3 main wins by vertical
2/2

Telco, Media & Utilities

- **KPN**: SI - Systems Integration
- **Orange Poland**: SI - Systems Integration - BSS/OSS
- **Coriant**: MS - Managed Service
- **Maroc Telecom**: SI - MT TMA FMI
- **R.C.S. Editori**: MS - Datacenter outsourcing
- **Telegraaf Media Group**: MS – Canopy Infrastructure as a Service

Financial Services

- **Leading German bank**: MS - Management of bankwide email infrastructure (hosted by Canopy)
- **Al Rajeh** (leading Middle East bank): SI - New Omnichannel platform implementation & Application Management
- **Garanti** (leading Turkish bank): BPO contract renewal
- **MassMutual**: MS - Infrastructure and Application Operations outsourcing
- **Achmea**: MS - Test & Development cloud service (Canopy)
Michel-Alain Proch,
Executive Vice President and Group CFO

Financial performance
## Constant scope and exchange rates reconciliation

### In EUR million

<table>
<thead>
<tr>
<th></th>
<th>Q3 2013</th>
<th>Q3 2012</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Statutory revenue</strong></td>
<td>2,086</td>
<td>2,181</td>
<td>-4.4%</td>
</tr>
<tr>
<td>Scope impact</td>
<td>5</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Exchange rates impact</td>
<td>-61</td>
<td>-61</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue at constant scope and exchange rates</strong></td>
<td>2,086</td>
<td>2,125</td>
<td>-1.8%</td>
</tr>
</tbody>
</table>
## Q3 2013 revenue performance by Service Line

**Third quarter 2013**
*25 October 2013*

<table>
<thead>
<tr>
<th>Service Line</th>
<th>Q3 2013</th>
<th>Q3 2012*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Services</td>
<td>987</td>
<td>1,007</td>
<td>-2.0%</td>
</tr>
<tr>
<td>Systems Integration</td>
<td>547</td>
<td>555</td>
<td>-1.5%</td>
</tr>
<tr>
<td>HTTS &amp; Specialized Businesses</td>
<td>411</td>
<td>418</td>
<td>-1.7%</td>
</tr>
<tr>
<td>of which HTTS</td>
<td>294</td>
<td>284</td>
<td>+3.4%</td>
</tr>
<tr>
<td>Consulting &amp; Technology</td>
<td>141</td>
<td>144</td>
<td>-1.9%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td>2,086</td>
<td>2,125</td>
<td>-1.8%</td>
</tr>
</tbody>
</table>

*Constant scope and exchange rates*
# 9M 2013 revenue performance by Service Line

<table>
<thead>
<tr>
<th>Service Line</th>
<th>9M 2013</th>
<th>9M 2012*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Services</td>
<td>2,985</td>
<td>3,005</td>
<td>-0.6%</td>
</tr>
<tr>
<td>Systems Integration</td>
<td>1,680</td>
<td>1,698</td>
<td>-1.0%</td>
</tr>
<tr>
<td>HTTS &amp; Specialized Businesses</td>
<td>1,255</td>
<td>1,251</td>
<td>+0.3%</td>
</tr>
<tr>
<td>of which HTTS</td>
<td>886</td>
<td>845</td>
<td>+4.8%</td>
</tr>
<tr>
<td>Consulting &amp; Technology</td>
<td>456</td>
<td>488</td>
<td>-6.6%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td>6,376</td>
<td>6,441</td>
<td>-1.0%</td>
</tr>
</tbody>
</table>

* Constant scope and exchange rates
**Q3 2013 revenue performance by Business Unit**

- **Growth driven by North America, Iberia, and Atos Worldline**

<table>
<thead>
<tr>
<th>In EUR million</th>
<th>Q3 2013</th>
<th>Q3 2012*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>422</td>
<td>432</td>
<td>-2.2%</td>
</tr>
<tr>
<td>United Kingdom &amp; Ireland</td>
<td>394</td>
<td>395</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Benelux &amp; The Nordics</td>
<td>266</td>
<td>268</td>
<td>-0.8%</td>
</tr>
<tr>
<td>France</td>
<td>238</td>
<td>260</td>
<td>-8.2%</td>
</tr>
<tr>
<td>Atos Worldline</td>
<td>222</td>
<td>216</td>
<td>+3.1%</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td>196</td>
<td>211</td>
<td>-7.2%</td>
</tr>
<tr>
<td>North America</td>
<td>146</td>
<td>139</td>
<td>+5.4%</td>
</tr>
<tr>
<td>Iberia</td>
<td>81</td>
<td>77</td>
<td>+5.2%</td>
</tr>
<tr>
<td>Other BUs</td>
<td>119</td>
<td>128</td>
<td>-6.6%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td>2,086</td>
<td>2,125</td>
<td>-1.8%</td>
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*Constant scope and exchange rates*
### 9M 2013 revenue performance by Business Unit

**Growth driven by North America, Iberia, and Atos Worldline**

<table>
<thead>
<tr>
<th>In EUR million</th>
<th>9M 2013</th>
<th>9M 2012*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>1,232</td>
<td>1,282</td>
<td>-4.0%</td>
</tr>
<tr>
<td>United Kingdom &amp; Ireland</td>
<td>1,228</td>
<td>1,181</td>
<td>+4.0%</td>
</tr>
<tr>
<td>Benelux &amp; The Nordics</td>
<td>814</td>
<td>834</td>
<td>-2.4%</td>
</tr>
<tr>
<td>France</td>
<td>752</td>
<td>828</td>
<td>-9.1%</td>
</tr>
<tr>
<td>Atos Worldline</td>
<td>662</td>
<td>639</td>
<td>+3.6%</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td>616</td>
<td>630</td>
<td>-2.2%</td>
</tr>
<tr>
<td>North America</td>
<td>458</td>
<td>411</td>
<td>+11.5%</td>
</tr>
<tr>
<td>Iberia</td>
<td>245</td>
<td>259</td>
<td>-5.2%</td>
</tr>
<tr>
<td>Other BUs</td>
<td>370</td>
<td>379</td>
<td>-2.2%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td><strong>6,376</strong></td>
<td><strong>6,441</strong></td>
<td><strong>-1.0%</strong></td>
</tr>
</tbody>
</table>

* Constant scope and exchange rates
Group headcount evolution

Third quarter 2013
25 October 2013

Headcount as of 30/06/13: 77,105
Scope effect: +75
Hiring: +2,877
Leavers: -1,947
Restructuring & dismissals: -1,031
Headcount as of 30/09/13: 77,080
# Cash flow and net cash position

*(in EUR million)*

<table>
<thead>
<tr>
<th></th>
<th>Net cash 30/06/13</th>
<th>Q3 2013 free cash flow</th>
<th>Impact of FX fluctuation</th>
<th>Share buy-back</th>
<th>Acquisition*</th>
<th>Equity change**</th>
<th>Net cash 30/09/13</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net cash</strong></td>
<td>359</td>
<td>353</td>
<td>+21</td>
<td>-7</td>
<td>-14</td>
<td>-16</td>
<td>353</td>
</tr>
<tr>
<td><strong>Impact of FX fluctuation</strong></td>
<td></td>
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<tr>
<td><strong>Share buy-back</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Acquisition</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Equity change</strong></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Net cash</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

* Acquisition of WindowLogic in Australia and New-Zealand on July 1st, 2013.

** Equity change relates to Canopy and Buyster.
Gilles Grapinet,
Senior Executive Vice President, Global Functions

Focus on Worldline
Worldline Q3 2013 highlights

Third quarter 2013
25 October 2013

EUR 277 million
Q3 Revenue
+5.5%
Q3 organic growth

EUR 825 million
9M Revenue
+5.4%
9M organic growth

EUR 1.6 billion
Backlog at 30 Sept.

7,250
Staff at 30 Sept.
Merchant Services & Terminals

Third quarter 2013
25 October 2013

Main activities & offerings

▶ Commercial acquiring and acceptance services
▶ Online services
▶ Private label cards and loyalty services
▶ Payment terminals

9M 2013 revenue

EUR 264 million
+2.3% organic growth
Mobility & e-Transactional Services

Main activities & offerings

▶ e-Government services (tolling systems, fine processing centers,...)
▶ e-Ticketing solutions and services
▶ e-Consumer and mobility services

9M 2013 revenue

EUR 273 million
+10.3% organic growth
Financial Processing & Software Licensing

Main activities & offerings

- Issuing processing services
- Acquiring processing services
- Online banking platforms
- Payment software licensing

9M 2013 revenue

EUR 287 million
+4.0% organic growth
Recent wins and partnerships for Worldline

- **July 2013**: Partnership with Renault to offer secure shopping with new R-Link table
- **July 2013**: Worldline to assist Michelin solutions in developing connected solutions
- **September 2013**: Partner of Edenred and Sodexo for the roll out of electronic meal vouchers
- **September 2013**: Merchant acquiring agreement with Diners Club
- **September 2013**: Launch of a new unified multichannel interaction management platform in Europe with Eptica
- **September 2013**: Worldline chosen by BNP Paribas, La Banque Postale and Société Générale for implementing Paylib’ service
- **September 2013**: Worldline assists The Green Link in developing solutions for urban delivery
- **October 2013**: MasterCard and Worldline announce their partnership on the integration and deployment of MasterPass™, the future of digital transactions
Forthcoming event

Analyst Day on October 15th, 2013
## Analyst Day agenda

**November 15th, 2013 8:00am – 4:30pm**

<table>
<thead>
<tr>
<th>Time</th>
<th>Speaker</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00am</td>
<td><strong>Introduction by Gilles Arditti</strong></td>
<td></td>
</tr>
<tr>
<td>08:00am</td>
<td>Thierry Breton</td>
<td>Vision, strategy &amp; 2016 ambition</td>
</tr>
<tr>
<td>08:00am</td>
<td>Michel-Alain Proch</td>
<td>Financial strategy to support 2016 ambition</td>
</tr>
<tr>
<td>08:00am</td>
<td>Gilles Grapinet and team</td>
<td>Atos positioning to support topline growth</td>
</tr>
<tr>
<td></td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>01:10pm</td>
<td>Charles Dehelly and team</td>
<td>Plan to reach 2016 targets in IT Services</td>
</tr>
<tr>
<td>04:30pm</td>
<td><strong>End of the Analyst Day – Taxis and Shuttle departures</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Q&A

*01:10pm Lunch*

**Gilles Grapinet and team**

Worldline: strategy, execution and presentation by Business Line

**Q&A and conclusion**
Q&A session
From Questions to Answers
Thank you