First quarter 2014

Thursday April 17th, 2014

Bezons
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 2013 Reference Document filed with the Autorité des Marches Financiers (AMF) on April 2nd, 2014 under the registration number: D14-0272.

Business Units include Germany, France, United Kingdom & Ireland, Benelux & The Nordics (BTN: The Netherlands, Belgium, Luxembourg, Denmark, Finland, and Sweden), Worldline, Central & Eastern Europe (CEE: Austria, Bulgaria, Croatia, Serbia, Poland, Czech Republic, Russia, Romania, Slovakia, Switzerland, Italy, and Turkey), North America (USA and Canada), Iberia (Spain and Portugal), and Other Business Units including Major Events (including MSL), 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, Morocco, South Africa, and Cloud & Enterprise Software.

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

Worldline pro forma revenue figures are best estimates made by the company and net of any transaction with other Atos Service Lines. As a result, Worldline standalone first quarter revenue figure may differ very slightly.
Agenda

1. Key figures & highlights
2. Commercial activity
3. Financial results
4. Performance of Worldline
5. 2014 objectives
6. Q&A session
7. Appendix
Gilles Grapinet,
Senior Executive Vice President, Global Functions

Highlights
### Key figures

<table>
<thead>
<tr>
<th></th>
<th>Q1 2014</th>
<th>Q1 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue (€m)</strong></td>
<td>2,064</td>
<td>2,102</td>
</tr>
<tr>
<td><strong>Free cash flow (€m)</strong></td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td><strong>Net cash (€m)</strong></td>
<td>830</td>
<td>258</td>
</tr>
<tr>
<td><strong>Total number of employees</strong></td>
<td>76,026</td>
<td>76,261</td>
</tr>
</tbody>
</table>

*Revenue at constant scope and exchange rates*
Contract renewed until 2017 with a large media company in the United Kingdom

Successful delivery of the IT Services for Sochi 2014

Signature of a Memorandum of Understanding with Gazprom and Sibur for a long term strategic partnership in IT services in Russia
Agreement for early termination of WCA contract with DWP

Successful Industry Analyst Day held with testimonials from large customers ready for digitalization of their business with Atos

Share buy-back II program almost completed

Worldline IPO* process well on track as planned and completion expected before summer break

* depending on market conditions and after consultation of the appropriate employee representative organization
Gilles Grapinet,
Senior Executive Vice President, Global Functions

Commercial activity
Key commercial figures

**First quarter 2014**
April 17th, 2014

<table>
<thead>
<tr>
<th>Figure Description</th>
<th>Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order entry (€ million)</td>
<td>1,671</td>
<td></td>
</tr>
<tr>
<td>Backlog (€ billion) (1.7 years of revenue)</td>
<td>14.7</td>
<td></td>
</tr>
<tr>
<td>Book to bill ratio</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>Pipeline (€ billion) (7 months of revenue)</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>
Main wins in IT Services

Manufacturing, Retail & Transportation

- **RAG** (Germany): **MS & SI** – Infrastructure management (renewal)
- **BMW** (Germany): **SI** – Test and acceptance management (new business)
- **Philips** (Benelux): **MS** - R&D storage (new business)
- **TNO Information** (Benelux): **SI** - IT Project (new business)
- **Thyssen Krupp** (France): **SI** – SAP roll-out (new business)

Public & Health

- **European Agency**: **SI** - Framework contract for the maintenance of the Schengen information system
- **Government Gateway** (UK): **MS & SI** - 2 year extension
- **UK Public administration** (UK): **SI** – Extension
- **French Ministry of Budget** (France): **TS** – New business
- **Natural England** (UK): **SI** - Systems Integration (renewal)
- **English Ministry** (UK): **CO** - Network Services (new business)
Main wins in IT Services
2/2

First quarter 2014
April 17th, 2014

Telcos, Media & Utilities

▶ A large media company (UK): **MS & SI** – Managed Service (renewal)
▶ EDF RTE (France): **MS** - Enterprise application (new business)
▶ GDF Suez (France): **MS** – European common platform (new business)
▶ Unify (Germany): **MS** - Datacenter (renewal)
▶ InterContinental Hotels Group (North America): **MS** – User services (Renewal)

Financial Services

▶ A large Spanish bank (Iberia): **SI** - Applications Management (new business)
▶ A leading international bank (France): **MS** – Cloud Services (new business)
▶ A large Spanish bank (Iberia): **SI** - Application Management (new business)
▶ The largest Islamic bank (ME region), **SI** - Applications Management (new business)
Order entry and backlog

Total order entry in Q1 2014 at € 1,671 million

<table>
<thead>
<tr>
<th>Book to bill</th>
<th>Q1 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Services*</td>
<td>79%</td>
</tr>
<tr>
<td>Consulting &amp; Systems Integration</td>
<td>92%</td>
</tr>
<tr>
<td>Worldline</td>
<td>83%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td><strong>81%</strong></td>
</tr>
</tbody>
</table>

Strong fertilization revenue plan:
600+ sales with specific Q2 2014 targets

Backlog: Strong visibility at € 14.7 billion

- Managed Services (2.2 years of revenue) 66%
- Consulting & Systems Integration (1.1 years of revenue) 23%
- Worldline (1.4 years of revenue) 11%

* Excluding BPO

First quarter 2014
April 17th, 2014

120% to 130% targeted book to bill in Q2 2014
Full qualified pipeline

Healthy pipeline at € 5.0 billion

Breakdown by Service Line

- Managed Services: 56%
- C & SI: 33%
- Worldline: 11%

Breakdown by deals size

- Above € 50 million: 67%
- € 50 to 20 million: 25%
- Below € 20 million: 8%

Solid pipeline with large deals in Managed Services

New Head of Sales appointed at Group level: Patrick Adiba
Michel-Alain Proch, 
Executive Vice President and Group CFO

Financial results
Constant scope and exchange rates reconciliation

<table>
<thead>
<tr>
<th>In € million</th>
<th>Q1 2014</th>
<th>Q1 2013</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statutory revenue</td>
<td>2,064</td>
<td>2,117</td>
<td>-2.5%</td>
</tr>
<tr>
<td>Scope effect</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Exchange rates effect</td>
<td>-18</td>
<td>-18</td>
<td></td>
</tr>
<tr>
<td><strong>Revenue at constant scope and exchange rates</strong></td>
<td><strong>2,064</strong></td>
<td><strong>2,102</strong></td>
<td><strong>-1.8%</strong></td>
</tr>
</tbody>
</table>

- **Scope effect** resulted from the acquisition of WindowLogic (Asia-Pacific, July 2013) and the disposal of Atos Formation (France, March 2013) and Metrum (The Netherlands, January 2014).

- **Significant exchange rates effect** Exchange rates effect resulted from the Argentine peso (-35.5%), the Brazilian real (-18.7%) and the US dollar (-3.4%) depreciating versus the euro and from the British pound strengthening versus the euro (+2.8%).
Reporting changes further to new organization implemented:

- Consulting & Technology Services was mostly transferred to **Consulting & Systems Integration**. A small part of the Technology Services was transferred to **Managed Services**

- BPO was transferred to **Managed Services**

- **Worldline** is presented as if the carve-out would have taken place on January 1st, 2013

- HTTS & Specialized Businesses does not exist anymore and Other Specialized Businesses (Civil & National Security and Smart Energy) were transferred to **Consulting & Systems Integration**

- Sub-market Transport transferred to **Manufacturing, Retail & Transport**
### Revenue by Service Line

<table>
<thead>
<tr>
<th>In € million</th>
<th>Q1 2014</th>
<th>Q1 2013*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managed Services</td>
<td>1,075</td>
<td>1,101</td>
<td>-2.4%</td>
</tr>
<tr>
<td>Consulting &amp; Systems Integration</td>
<td>724</td>
<td>738</td>
<td>-1.9%</td>
</tr>
<tr>
<td>Worldline</td>
<td>265</td>
<td>262</td>
<td>+1.0%</td>
</tr>
<tr>
<td><strong>Total Group</strong></td>
<td><strong>2,064</strong></td>
<td><strong>2,102</strong></td>
<td><strong>-1.8%</strong></td>
</tr>
</tbody>
</table>

*Constant scope and exchange rates

- **Cloud Services** strongly grew in **Managed Services** contracts
- Positive organic growth both in Financial and Medical **BPO**
- **Systems Integration** growing in Public & Health and Manufacturing, Retail & Transportations
- Strong **Consulting** activity in the United Kingdom
Revenue by Business Unit

<table>
<thead>
<tr>
<th>In € million</th>
<th>Q1 2014</th>
<th>Q1 2013*</th>
<th>% growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom &amp; Ireland</td>
<td>396</td>
<td>390</td>
<td>+1.6%</td>
</tr>
<tr>
<td>Germany</td>
<td>389</td>
<td>400</td>
<td>-2.7%</td>
</tr>
<tr>
<td>France</td>
<td>257</td>
<td>263</td>
<td>-2.1%</td>
</tr>
<tr>
<td>Benelux &amp; The Nordics</td>
<td>255</td>
<td>279</td>
<td>-8.5%</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td>184</td>
<td>186</td>
<td>-1.0%</td>
</tr>
<tr>
<td>North America</td>
<td>143</td>
<td>147</td>
<td>-3.1%</td>
</tr>
<tr>
<td>Iberia</td>
<td>71</td>
<td>74</td>
<td>-4.5%</td>
</tr>
<tr>
<td>Other BUs</td>
<td>104</td>
<td>100</td>
<td>+3.5%</td>
</tr>
<tr>
<td><strong>Total IT Services</strong></td>
<td><strong>1,799</strong></td>
<td><strong>1,839</strong></td>
<td><strong>-2.2%</strong></td>
</tr>
<tr>
<td><strong>Worldline</strong></td>
<td><strong>265</strong></td>
<td><strong>262</strong></td>
<td><strong>+1.0%</strong></td>
</tr>
<tr>
<td><strong>TOTAL GROUP</strong></td>
<td><strong>2,064</strong></td>
<td><strong>2,102</strong></td>
<td><strong>-1.8%</strong></td>
</tr>
</tbody>
</table>

*Constant scope and exchange rates*
First quarter 2014
April 17th, 2014

- Stable number of staff
- Strong level of hiring at circa 10,000 on a yearly basis

<table>
<thead>
<tr>
<th>Headcount as of 31/12/13</th>
<th>Scope effect</th>
<th>Hiring</th>
<th>Leavers</th>
<th>Restructuring &amp; dismissals</th>
<th>Change in temporary staff</th>
<th>Headcount as of 31/03/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>76,320</td>
<td>100</td>
<td>2,452</td>
<td>1,772</td>
<td>734</td>
<td>140</td>
<td>76,026</td>
</tr>
</tbody>
</table>
Cash flow and net cash position
(in € million)

- Free cash flow stable compared to Q1 2013
- Share buy-back II completed

<table>
<thead>
<tr>
<th>Net cash 31/12/13</th>
<th>Q1 2014 free cash flow</th>
<th>Share buy-back</th>
<th>Translation differences effect</th>
<th>Net cash 31/03/14</th>
</tr>
</thead>
<tbody>
<tr>
<td>905</td>
<td>30</td>
<td>-102</td>
<td>-3</td>
<td>830</td>
</tr>
</tbody>
</table>

First quarter 2014
April 17th, 2014
Update on DWP WCA contract

Agreement reached in March 2014 with the Department for Work and Pensions in the UK regarding the Work Capability Assessment (WCA) contract:

- **Early exit** on February 2015 versus August 2015 previously
- New **agreed volumes** of medical assessments to be delivered until February 2015 and **subsequent credit regime**
- **Smooth transition** to one single provider which guarantees **complete transfer of staff** (administrative and medical) as well as **infrastructures**
- **Continuity and quality of service** until completion of the transition
- **Full waving of past claims** through a **financial settlement fully accrued** in 2013 Group accounts
- Work Capability Assessment contract in **Northern Ireland unaffected** by early termination

**DWP Personal Independence Payment (PIP)** contract is **ramping-up**:

- Scotland, North of England, London and South of England
3-year plan well on track with already significant progresses in Q1 2014

**End-to-end coverage in FTE**

2013: 1,000
Q1 2014: 1,500
2016: 15,000

*+ pilot in SI*

**Systems Integration offshore ratio**

2013: 33%
Q1 2014: 35%
2016: >50%

**SG&A as % of revenue**

2013: 10%
Q1 2014: 9.8%
2016: 9% to 9.5%

**Number of vendors representing 80% of purchasing**

2013: 800
Q1 2014: 550
2016: 200
Gilles Grapinet,
Senior Executive Vice President, Global Functions
Chief Executive Officer of Worldline

Performance of Worldline
E-payment services
an atos company
Key figures

First quarter 2014
April 17th, 2014

€265m
+1.0% organic

Revenue

€1.6bn

Backlog

€25m

Free cash flow

7,200

Total headcount
Merchant Services & Terminals

First quarter 2014
April 17th, 2014

Main activities & offerings

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

Q1 2014

€89m
Revenue
+1.2%
Organic growth
**Financial Processing & Software Licensing**

**Main activities & offerings**

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

**Q1 2014**

€94m Revenue

+3.0% Organic growth

**First quarter 2014**
April 17th, 2014
Mobility & e-Transactional Services

First quarter 2014
April 17th, 2014

Main activities & offerings

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

Q1 2014

€82m Revenue
-1.5% Organic growth
Recent wins and partnerships for Worldline

From January to March 2014

▶ In Belgium, Worldline was retained by ING to support its acquiring business
▶ “Fonds de Garantie des Dépôts et de Résolution” selected Worldline to develop and host its information system in France
▶ Worldline’s contract was extended with Volkswagen Bank in Germany and in France with LCL and “Groupe Chèque Dejeuner”
▶ Partner of Good Deal to enhance kiosk platform of accessing promotions for retail customers
▶ Worldline to integrate into PAY.ON’s web-based, omnichannel payment gateway to extend the coverage of its international acceptance
▶ Partnership with Yapital to allow retailers with card terminals to receive payments via smartphones through network operators
▶ HERE and Worldline teamed for cars and commercial vehicles enabling connected services
Gilles Grapinet,
Senior Executive Vice President, Global Functions

2014 objectives
The Group confirms all its objectives for 2014 as stated in the February 19th, 2014 release, i.e.:

▶ **Revenue**
  – The Group expects to **positively grow** compared to 2013.

▶ **Operating margin**
  – The Group has the objective to continue improving its operating margin rate targeting **7.5% to 8.0%** of revenue.

▶ **Free cash flow**
  – The Group expects to achieve a free cash flow **above 2013** level, in line with 2016 ambition.
Management team

Q&A session
From Questions to Answers
Appendix
New organization effect on Q1 2013
and constant scope and FX reconciliation

First quarter
2014
April 17th, 2014

In € million

<table>
<thead>
<tr>
<th>In € million</th>
<th>Q1 2013 statutory</th>
<th>Internal transfer</th>
<th>Atos Worldgrid</th>
<th>Atos WFM &amp; Diamis</th>
<th>N&amp;SWE</th>
<th>Worldline Carve-out</th>
<th>Q1 2013 new organization</th>
<th>Scope impact</th>
<th>Exchange rates impact*</th>
<th>Q1 2013 at constant scope and FX*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>396</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>400</td>
<td>400</td>
<td>10</td>
<td>390</td>
</tr>
<tr>
<td>UK &amp; Ireland</td>
<td>411</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>380</td>
<td>380</td>
<td>10</td>
<td>390</td>
</tr>
<tr>
<td>France</td>
<td>228</td>
<td>22</td>
<td>12</td>
<td>40</td>
<td></td>
<td></td>
<td>280</td>
<td>263</td>
<td>0</td>
<td>279</td>
</tr>
<tr>
<td>Benelux &amp; The Nordics</td>
<td>240</td>
<td>24</td>
<td>36</td>
<td></td>
<td></td>
<td></td>
<td>192</td>
<td>192</td>
<td>-5</td>
<td>186</td>
</tr>
<tr>
<td>Atos Worldline</td>
<td>228</td>
<td></td>
<td>-12</td>
<td></td>
<td></td>
<td></td>
<td>153</td>
<td>153</td>
<td>-5</td>
<td>147</td>
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<tr>
<td>Central &amp; Eastern Europe</td>
<td>127</td>
<td>13</td>
<td>53</td>
<td>-2</td>
<td></td>
<td></td>
<td>192</td>
<td>192</td>
<td>-5</td>
<td>186</td>
</tr>
<tr>
<td>North America</td>
<td>153</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>153</td>
<td>153</td>
<td>-5</td>
<td>147</td>
</tr>
<tr>
<td>North &amp; South Western Europe</td>
<td>94</td>
<td></td>
<td>-94</td>
<td></td>
<td></td>
<td></td>
<td>74</td>
<td>74</td>
<td>-14</td>
<td>100</td>
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<tr>
<td>Iberia</td>
<td>76</td>
<td>6</td>
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<td>111</td>
<td>111</td>
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</tr>
<tr>
<td>Other BUs</td>
<td>166</td>
<td>-46</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>111</td>
<td>111</td>
<td>4</td>
<td>100</td>
</tr>
<tr>
<td>Total IT Services</td>
<td>2,117</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-265</td>
<td>1,852</td>
<td>2</td>
<td>-15</td>
<td>1,839</td>
</tr>
<tr>
<td>Worldline</td>
<td></td>
<td></td>
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<td>262</td>
</tr>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2,117</td>
<td>2</td>
<td>-18</td>
<td>2,102</td>
</tr>
<tr>
<td>Managed Services (incl. BPO)</td>
<td>990</td>
<td></td>
<td>117</td>
<td></td>
<td></td>
<td>0</td>
<td>1,107</td>
<td>1,107</td>
<td>-6</td>
<td>1,101</td>
</tr>
<tr>
<td>Consulting &amp; Systems Integration</td>
<td>485</td>
<td>201</td>
<td>46</td>
<td>12</td>
<td></td>
<td>0</td>
<td>745</td>
<td>745</td>
<td>-9</td>
<td>738</td>
</tr>
<tr>
<td>HTTS &amp; Specialized Businesses</td>
<td>481</td>
<td></td>
<td>-157</td>
<td>-46</td>
<td>-12</td>
<td>-265</td>
<td></td>
<td>2,117</td>
<td>-18</td>
<td>2,102</td>
</tr>
<tr>
<td>Consulting &amp; Technology Serv.</td>
<td>161</td>
<td></td>
<td>-161</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>265</td>
<td>-3</td>
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<td>2</td>
<td>-18</td>
<td>2,102</td>
</tr>
</tbody>
</table>

* At March 2014 Exchange rates
### New organization effect on FY 2013 and constant scope and FX reconciliation

**First quarter 2014**  
April 17th, 2014

#### In € million

<table>
<thead>
<tr>
<th></th>
<th>FY 2013 statutory</th>
<th>Internal transfer</th>
<th>Worldline Carve-out</th>
<th>FY 2013 new organization</th>
<th>Scope impact</th>
<th>Exchange rates impact*</th>
<th>FY 2013 at constant scope and FX*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Germany</strong></td>
<td>1,659</td>
<td>1</td>
<td>-127</td>
<td>1,661</td>
<td></td>
<td></td>
<td>1,661</td>
</tr>
<tr>
<td><strong>UK &amp; Ireland</strong></td>
<td>1,647</td>
<td>0</td>
<td>-127</td>
<td>1,521</td>
<td>40</td>
<td>-1</td>
<td>1,560</td>
</tr>
<tr>
<td><strong>France</strong></td>
<td>1,020</td>
<td>1</td>
<td>1,020</td>
<td>1,020</td>
<td>0</td>
<td></td>
<td>1,020</td>
</tr>
<tr>
<td><strong>Benelux (&amp; The Nordics)</strong></td>
<td>1,083</td>
<td>1</td>
<td>1,085</td>
<td>-3</td>
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<td><strong>Total IT Services</strong></td>
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<td>-43</td>
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*At March 2014 Exchange rates*
Thank you

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