Leading the shift to Digital & Sustainable Manufacturing

Eric Grall
Head of Manufacturing, Chief Operating Officer

Ursula Morgenstern
Head of Central Europe
MANUFACTURING ID CARD

>500 plants Worldwide among our TOP10 CUSTOMERS

GLOBAL CUSTOMERS representing c.61% OF REVENUE

TOP10 CUSTOMERS representing 51% OF REVENUE

18k HEADCOUNT

€2.3bn 2019 REVENUE

136m 2019 OPERATING MARGIN

#2 MANUFACTURING SERVICE PROVIDER

96% 2019 Book to bill

6.0% 2019 OPERATING RATE

€5.7bn FEB 20 ACTUALS BACKLOG representing 2 years of revenue

1) HFS 2020
MANUFACTURING GLOBAL FOOTPRINT

2019 Revenue: €2,3bn
<table>
<thead>
<tr>
<th>MANUFACTURING GLOBAL CONTEXT</th>
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<tbody>
<tr>
<td>SHIFT REQUIRED TO DIGITAL AND SUSTAINABLE MANUFACTURING</td>
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<tr>
<th>NEED AGILE and SCALABLE SUPPLY CHAINS</th>
<th>CYBERSECURITY</th>
<th>DECARBONIZATION</th>
<th>END CONSUMER OBSESSION</th>
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<td>to manage risk leveraging digital platforms</td>
<td>in a connected environment 48% of MFT customers have been hacked</td>
<td>Getting integrated into core manufacturers strategy. 1T€ investment in Europe</td>
<td>driving need for 360 customer analytics, transparency &amp; sustainability 56% of consumers are millennials</td>
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<th>SMART FACTORY MATURING</th>
<th>THE NEW NORMAL FOR AUTOMOTIVE</th>
<th>REINVENTING CPG</th>
<th>REINVENTING AEROSPACE</th>
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<td>to mainstream, IoT and AI on the shopfloor. Key to competitiveness for 86% of customers</td>
<td>Product Personalization, Electric Powertrains, Autonomous driving, and over-the-air updates</td>
<td>Products &amp; ingredients traceability, plastic reduction And Connected inventory solutions</td>
<td>Digitizing designs and production to reduce production Backlogs Expanding Aftermarket</td>
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* By market cap: Tesla  ** All industries, worldwide
MANUFACTURING
COVID CRISIS ACCELERATING SEVERAL EXISTING TRENDS

PRE-CRISIS TRENDS THAT WILL ENDURE:
- Digitalization
- Cybersecurity
- Decarbonization
- Traceability

TRENDS ACCELERATED BY THE COVID CRISIS:
- Standardization
- As a Service
- Rightshoring of supply chain

* By market cap: Tesla  ** All industries, worldwide

AT THE CORE OF ATOS VALUE PROPOSITION
MANUFACTURING
ATOS LEADING INDUSTRY EXPERTISE AND ASSETS

OUR EXPERTISE

18,000
MANUFACTURING-BUSINESS TECHNOLOGISTS

4
GLOBAL COMPETENCE CENTERS

INTIMATE INFRASTRUCTURE KNOWLEDGE FROM MAJOR PLAYERS

OUR SOLUTIONS & IP

Platforms Solutions:
• Smart Control room
• Connected Assets
• Digital twins, etc.
• PLM

CPG Supply Chain Management expertise

Mission Critical Systems (Aero, Auto)

Automotive Competence Center: High End R&D & Engineering Services

Service Enhancing Technologies: Virtual AR, Hollographic

OUR EXPERIENCE

Leader in Digital Manufacturing Services\(^1\)
#2 Manufacturing Service Provider\(^2\)

700+
Clients\(^3\) served

OUR PARTNERS

1) Nelson Hall 2020
2) HFS 2020
3) Named, active clients only
MANUFACTURING VALUE CHAIN IS PART OF ATOS DNA

PRODUCT DEVELOPMENT ➔ MANUFACTURING ➔ SALES & MARKETING ➔ AFTER SALES SERVICES ➔ REUSE, REFURB, RECYCLE

Ensure business continuity with Secured and integrated supply chains

Modernizing & Reinventing Manufacturing with Smart Factories

Personalizing User and Consumer Experiences

Improve Business Outcomes leveraging Digital Business Platforms & Ecosystems

SUSTAINABILITY & CYBERSECURITY

productivity, yield & energy gains

customer intimacy & retention

new revenue sources, lower warranty costs

sustainability & business continuity

Atos
MANUFACTURING (MFG)
EXPANDING & INDUSTRIALIZING THE PORTFOLIO TO ACCELERATE GROWTH

DRIVING PERFORMANCE

ROADMAP
Set strategy and direction to realize business value from digital transformation in a sustainable manner.

MANUFACTURING DATA FOUNDATION
Optimize core business applications in R&D, engineering, manufacturing & supply chain: PLM, MES, SAP, RPA

SMART FACTORY
Connect the factory in real time. Drive further improvements in productivity, yield, and energy consumption. IOT, edge, data platforms, AI

CUSTOMER CENTRED MANUFACTURING
Optimize customer and consumer experience at every stage of the journey to protect and grow revenues. Analytics, CRM, commerce, contact centre ...

CONNECTED PRODUCTS & SERVICES
Evaluate and implement new “connected” business models to enrich customer experience, grow revenues and improve supply chain performance. IoT, edge, data platforms, AI

SUSTAINABLE MANUFACTURING – A COMMON PURPOSE

CYBER SECURITY – ESSENTIAL

CORE INFRASTRUCTURE & PLATFORM SERVICES – THE FOUNDATION
Client STORIES
MANUFACTURING AUTOMOTIVE COMPETENCE CENTER
HIGH END R&D, BUSINESS CRITICAL ENVIRONMENT

MAJOR GERMAN AUTOMOTIVE MANUFACTURER
Connected Vehicle Service Management and Deployment

“New car over night” through the update over the air service

Customer benefits:
Upgrade cars over night, for a new level of customer experience
Access to new revenue streams for OEMs to sell additional features over the lifetime of the car
MANUFACTURING

CPG SAP COMPETENCE CENTER: SUPPLY CHAIN MANAGEMENT SERVICES

JEWELRY MANUFACTURER
ADDITIVE MANUFACTURING

Overall ecosystem with a hybrid SAP model for the new additive manufacturing solution
Increased productivity through new SAP application

GLOBAL BOTTLING COMPANY
VISION PICKING

Improved productivity and quality with Handsfree AR & Remote support
Reduce reading, typing time for workers on the shop floor. Complement with voice-based communication systems for full remote support

SWIRE
ATOS SAP S/4HANA

SAP S/4 HANA Greenfield implementation Implementation in complex processes and interfaces to achieve data transparency, integrated flexible processes and simplified ways of working
MANUFACTURING MEDIUM-TERM TARGETS: REVENUE GROWTH AND OPERATING MARGIN

MAIN ORGANIC GROWTH DRIVERS
- Cloud/DWP/SAP
- RPA/automation/AI + IoT/Edge
- Decarbonization, Platforms & Cyber-Security

MAIN OPERATING MARGIN DRIVERS
- Leverage & grow portfolio of pre-integrated solutions
- Progressive replacement of low margin contracts
- Automation acceleration & Operations Digital Platform

MAIN AREAS FOR STRATEGIC PARTNERSHIPS & M&A
- IoT & Edge
- Platform Solutions & PLM
- Information modeling, Applied AI/Automation for Supply Chain

*medium-term annual growth rate at constant currency
Thank YOU