

Telecom, Media & Technology

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Trusted partner for your Digital Journey



Atos

TELECOM, MEDIA & TECHNOLOGY INDUSTRY ID CARD

10 000 BUSINESS
TECHNOLOGISTS,
+ 3 000 industry
experts



GLOBAL
CUSTOMERS
representing
c. 58% OF REVENUE

€1.8^{bn}
2019 REVENUE

€1.9^{bn}
2019 ORDER ENTRY

10.2%
2019 OPERATING
MARGIN RATE



Present in
73
COUNTRIES

TOP 10
CUSTOMERS
representing
c. 44% OF
REVENUE

-2,7%
2019 Organic growth

292 TMT
CUSTOMERS

50%
OF BUSINESS IN
TELCO & MEDIA

€2.5^{bn}
2019 FULL BACKLOG
representing 139% year of revenue

TELECOM, MEDIA & TECHNOLOGY INDUSTRY

MARKET TRENDS



7bn

people are connected to mobile



31%

CAGR Chatbot Market to reach USD 10.08 bn by 2026



80%

80% of internet traffic is consumed today via video and TV



90%

of users said they find personalized advertising appealing



25bn

X3 more IoT objects will be connected by 2025



80%

of enterprise data will be processed outside data centers & the Cloud by 2025



SaaS

74% of operators have less than 10 percent of their BSS/OSS in a cloud



80%

enterprises will use software-defined networks by 2021



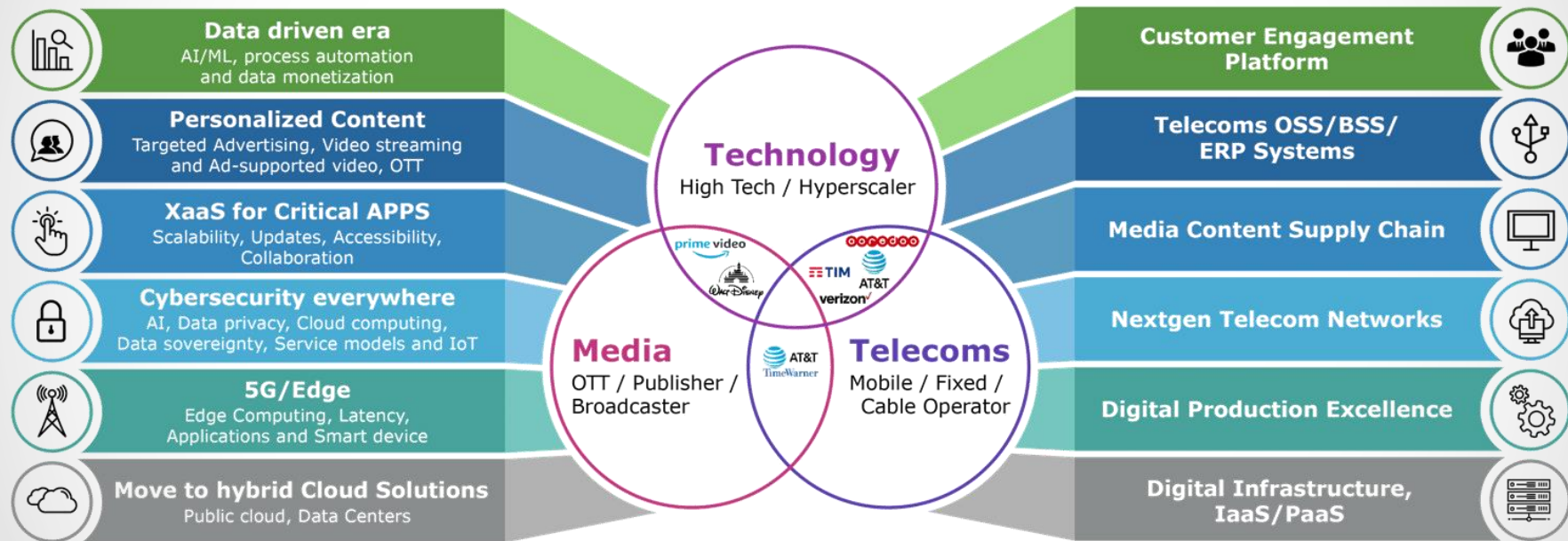
61%

of the sector's AI spending go to network operations, management and new data monetization stream

Sources: Cisco, Ericsson, IDATE, IDC, GSMA, GlobeNewswire

TOWARDS SUBINDUSTRIES CONVERGENCE

ATOS INVESTMENT PRIORITIES & PORTFOLIO



TELECOM, MEDIA & TECHNOLOGY

OUR STRENGTHS

OUR EXPERTISE

1300

IP in Telco

BNCS+

IP on the end-to-end
broadcasting platform

**NFV
Lab**

to help CSPs test NFVs in
a DevOps environment

OUR SOLUTIONS

**CYBERSECURITY, DATA ANALYTICS
& DECARBONIZATION**

- | Customer Engagement Platform
- | Telecoms OSS/BSS/ERP Systems
- | Media Content Supply Chain
- | Nextgen Telecom Networks
- | Digital Production Excellence
- | Digital Infra, IaaS/PaaS

OUR EXPERIENCE



INTERNATIONAL
OLYMPIC
COMMITTEE

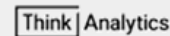
Digital partner of
the world's greatest
media & sporting event

292

CLIENTS SERVED



OUR PARTNERS



Atos

GROWTH STRATEGY

EXPORT OUR PLATFORMS AS OUR CUSTOMERS EXPAND TO NEW GEOGRAPHIES

TELECOMS

TOP
CUSTOMERS



PORTFOLIO

- | Nextgen Telecom Network (5G)
- | Telecoms OSS/BSS/ERP Systems
- | Digital Infra, IaaS/PaaS (Bare Metal Services, Edge computing)
- | Data Analytics (AI/ML)
- | Cybersecurity

MEDIA



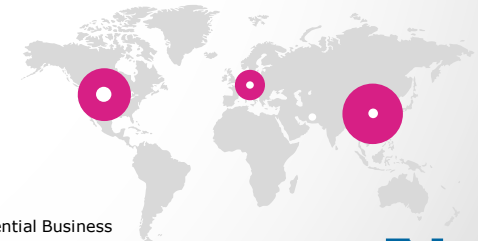
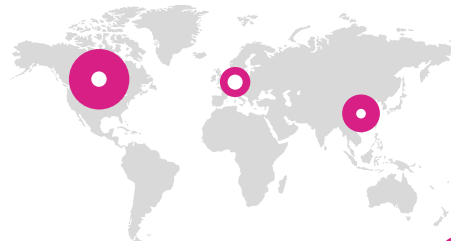
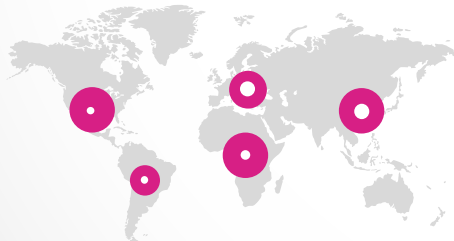
- | Customer Engagement Platform
- | Media Content Suppl Chain
- | Digital Production Excellence
- | Data Analytics (AI/ML)
- | Cybersecurity

TECHNOLOGY



- | Digital Infra, IaaS/PaaS (Bare Metal Services, Edge computing)
- | Data Analytics (AI/ML)
- | Cybersecurity

GEOGRAPHIES



Potential Business
Atos Business

Atos

DIGITAL BUSINESS SUPPORT SERVICES FOR BBC

SERVICE DELIVERY OF DIGITAL & BROADCAST OPERATIONS



MANAGING COMPLEXITY FOR UK'S PUBLIC SERVICE BROADCASTER

CHALLENGE

- | **New IP BBC and S4C broadcast facilities** in Cardiff to provide TV, radio and online services
- | And create a **wide range of programming** for viewers across the UK and supporting Welsh language

SOLUTION

- | **Around 600 Atos expert working on broadcast infrastructure** based on the Atos Broadcast Network Control System (BNCS): design, build and handover of technology and infrastructure

BENEFITS

- | Enabled **efficient**, converged support and maintenance
- | **Faster** and more **flexible** production workflows
- | **Easier** and more cost-effective content re-purposing
- | In our current contract with BBC, we are committed to a **50% reduction in our energy** usage in the services we provide to the BBC.



MEDIA ASSET MGMT./MEDIA WORKFLOW FOR INA

FRENCH NATIONAL AUDIOVISUAL INSTITUTE



INNOVATE WITH A DATA LAKE

CHALLENGE

- | **Modernize** the information system
- | **Leverage latent asset**

SOLUTION

- | **Data lake** to centralize storage, correlation and media assets metadata enrichment automation
- | Segmentation and categorization of data formats (images vs videos...)
- | Migration of the Legacy data
- | AI/ML-driven audio-video analysis tools for face, image and sound automatic recognition, speech to text and text OCR.

BENEFITS

- | **Better sourcing of media archives** (17 millions hours of TV and radio)
- | **Possibility to develop new services** (audio description...)

CUSTOMER ENGAGEMENT PLATFORM FOR SFR

FRENCH TELECOMMUNICATIONS OPERATOR



SFR

ADDRESS EXPONENTIAL MOBILE DATA GROWTH

CHALLENGE

- | Handle **huge mobile data growth** while revenue per subscriber are flat
- | **Reduce time & cost to deploy** Large Edge DC for 5G
- | Network **Capex and Opex reduction**
- | **Agility** to deploy new VNF and services

SOLUTION

- | Create a fully virtualized **NFV infrastructure** (private cloud) for **4G centralized DC** and **5G decentralized DC**
- | **~15+ VNF onboarded** (running either on **Openstack** or **VMWARE** on the same x86 infrastructure)
- | Design, Build, Operate 24/7
- | **ANSSI R226 approved for security**
- | **Network automation** of main deployment use cases:
 - | New Large Edge DC
 - | DC resource extension
 - | VNF onboarding

BENEFITS

- | **Reduction of deployment time and costs** via innovation, industrialization **and automation**
- | NFV DC deployment divided by 6 (from typically **12 months to 2 months**)
- | **Industrial** deployment of **5G DC**
- | **50% gain** on some **capacity extension**
- | Removing of several **legacy virtual infrastructures** in the network

CUSTOMER ENGAGEMENT PLATFORM FOR T-MOBILE

DUTCH TELECOMMUNICATIONS SERVICE PROVIDER



AI POWERED CHATBOT TO INCREASE CUSTOMER SATISFACTION

CHALLENGE

- | Provide a **more personalized customer care experience** on the T-Mobile website and social medias channels

SOLUTION

- | **Multi-channel chatbot** to streamline customer queries in a cost-efficient way:
 - | Atos industry expertise
 - | Latest AI/ML technologies from Google Cloud

BENEFITS

- | **Improved and more efficient service**, with faster insights into customer data
- | **Intent recognition increase** of 300+% through machine learning only after 4 sprints in 4 weeks

TMT PORTFOLIO

LAST WINS ALIGNED WITH NEW STRATEGY



CUSTOMER ENGAGEMENT
PLATFORM



TELECOMS
OSS/BSS/ERP SYSTEMS



MEDIA CONTENT
SUPPLY CHAIN



NEXTGEN TELECOM
NETWORKS



DIGITAL PRODUCTION
EXCELLENCE



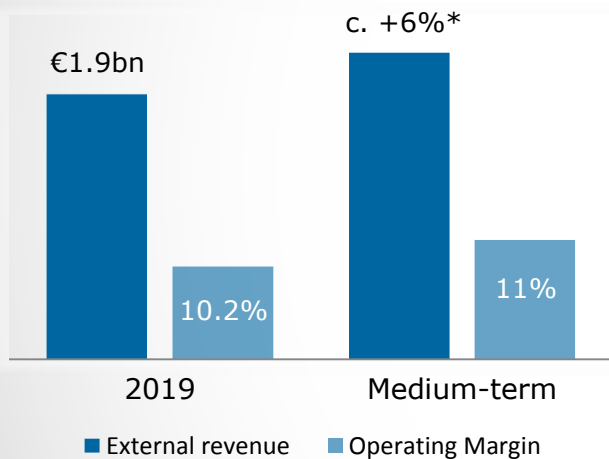
DIGITAL INFRASTRUCTURE,
IAAS/PAAS

END-TO-END
Cybersecurity
Data analytics,
decarbonization



MEDIUM-TERM TARGETS FOR TMT INDUSTRY

REVENUE GROWTH AND OPERATING MARGIN



MAIN ORGANIC GROWTH DRIVERS

- | Leverage Atos Digital Portfolio as our Top Customers grow
- | Address B2B shifts to Cybersecurity, AI/Edge, IoT
- | Enrich portfolio with strong partnerships

MAIN OPERATING MARGIN DRIVERS

- | Business replication using mutualized platforms for Network function & Media
- | Right-Shoring delivery and move to Agile
- | High value services developing more IP with software partners

MAIN AREAS FOR ACQUISITIONS

- | Online/Streaming and media platform
- | NFV transformation & Media Ipfication expertise

*medium-term annual growth rate at constant currency

Q&A

Trusted partner for your Digital Journey



Atos

Thank YOU

Trusted partner for your Digital Journey



Atos