

2019 Investor Day

Atos

Building on Atos industry & portfolio strengths and enhancing vertical go-to-market approach

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2019 Investor Day

Atos

Building on our strengths, scaling industry-specific customer focus

Cybersecurity everywhere



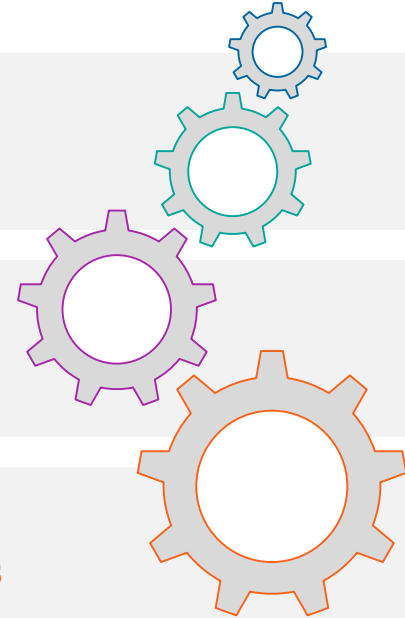
Industry expertise and solutions




Smart data platforms and services



Ecosystems of multiple infrastructures




We have started our journey towards increased customer centricity



Building on our strengths for the next wave of data-driven industry-specific digital transformation

- ▶ **Strong foundation of offerings** in IDM, B&PS, BDS
- ▶ **Ecosystems of multiple infrastructures**
- ▶ **Smart data platforms and services**
- ▶ **Cybersecurity** everywhere
- ▶ Addition of **Syntel know-how**



A journey already started

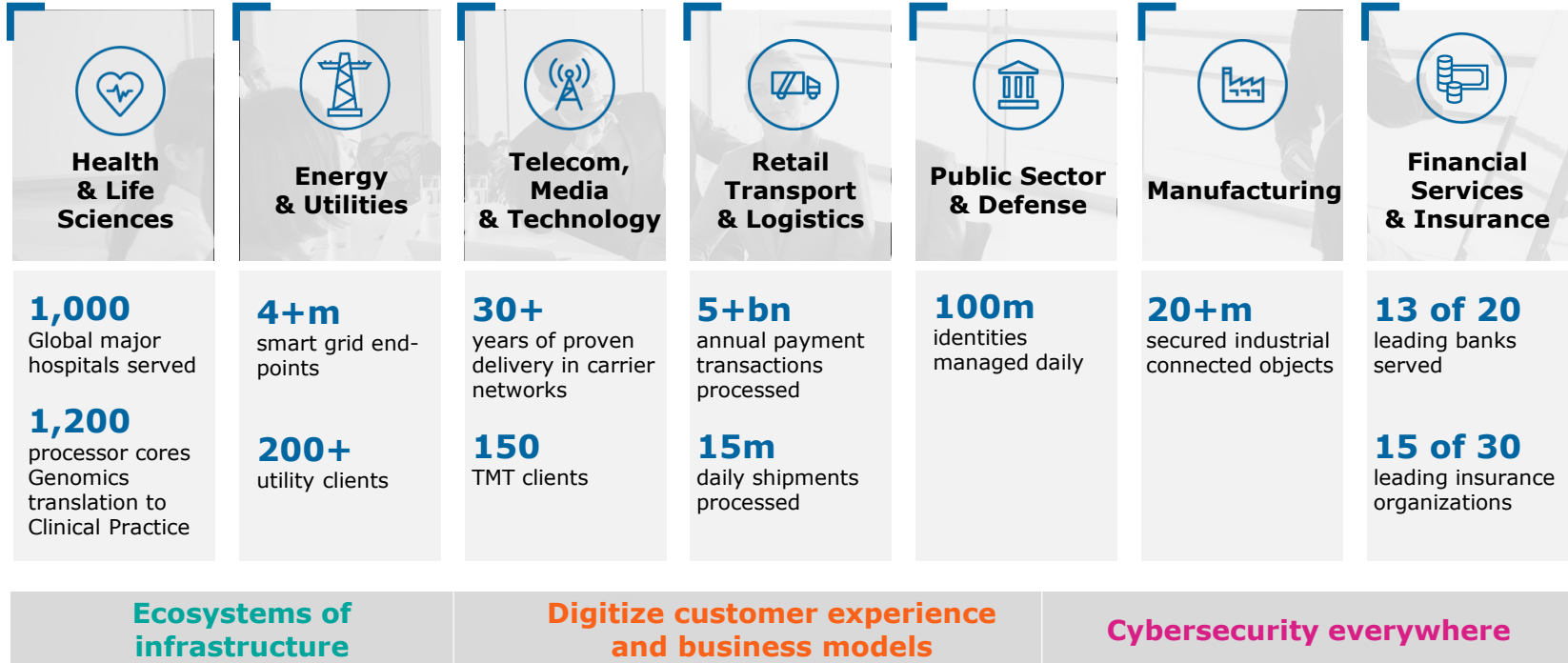
- ▶ Supported clients in **transforming their businesses and running mission critical services**
- ▶ Achieved **~4% growth and a strong Net Promoter Score of +48** on our Global integrated accounts in 2018



A journey set for future growth

- ▶ Strengthening our **vertical go-to-market approach**
- ▶ Expanding the **Global Integrated Account** management model
- ▶ Investing in **industry specific upscaling, preparing and training our people**

Strengthening our industry go-to-market approach in 7 verticals



Health



\$69bn
Market size

Evolving demographics

Growing funding gap

Evolving patients behaviors

From reactive
to proactive care



1

**Build real-time clinical
delivery & Electronic
Health Record**

2

**Enable collaboration,
tele-health and remote
monitoring**

3

**Contribute to precision
medicine**

Expertise

10+ thousand business
technologists

Major acquisitions

anthelio
A higher aim. A newer standard.
SYNTEL
Consider IT Done

CONDUENT
PURSUIT
HealthcareAdvisors

Solutions/IP

E2E Electronic Health
Record solutions

Identity and Access
Management **Evidian**

OMICS
solutions

Point of Care
solutions

E-health
solutions

Experience

1 thousand major hospitals
in Europe and North America



#4 overall Healthcare
IT services provider worldwide

Partners

SIEMENS

Allscripts

SAP

Cerner

AGFA

Epic

Energy & utilities



\$57bn
Market size

Renewables

Regulation driving
competition and new entrants

Energy & Utilities 4.0

1

Connect generation
facilities & enhance
equipment reliability

2

Enable real-time grid
management

3

Deploy smart & eco-
friendly customer
journey

Expertise

6 thousand business
technologists

3 thousand industry
experts

Solutions/IP

Atos
Worldgrid

Control
System

SCADA

Smart
Metering

CIS

Fraud
Detection

ECARGA
Futur-proof management
Of EV charging points

Experience

35+ years of experience

200+ Clients
served



Partners



Telecommunications



\$207bn
Market size

Diversification
into new businesses

Transformation of
customer journey

Simplified & virtualized
network



1

**Deploy omnichannel
customer engagement
platform**

2

**Rationalize & automate
back-office processes**

3

**Deploy network and
media function
virtualization**

Expertise

10 thousand business
technologists

3 thousand industry
experts

Solutions/IP

Integrated
telco play

ATF
Atos Tooling Framework

Intelligence Automation
Platform

Experience

100 BSS transformations
in the last 10 years

150 clients
served



Partners



Retail



\$202bn
Market size

Next-Gen customer experience:
integrated, anytime, anywhere and securely

Cost efficiency

Quality of Service



1 Deliver outstanding
customer experience

2 Support agile & efficient
operations, including
Next-Gen supply chain

3 Next-Gen payment
model

Expertise

Worldline

Undisputed leader of
payment services in Europe



Solutions/IP

Digital
Cloud Coupon

Product
Scanning

Track
& Trace

Digital
Signature Experience

Payment
Solutions

Loyalty
systems

Experience

1,100+ retailers served



Partners



ses imagotag



Public sector & Defense

 **\$230bn**
Market size

Integrated e-State
& digital citizens

Budgetary constraints

National security
& sovereignty



1 Enhance citizen
experience and the ability
to govern

2 Modernize legacy
systems for operational
excellence

3 Provide security,
identity and trust

Expertise

Global

Expertise applied locally
Government-to-Government

10+ thousand business
technologists

Solutions/IP

 Evidian  BullSequana  Auxylum NG9-1-1 Centrillum Track & Trace

Experience

190+

Public Sector players
migrated on cloud

5

Continents
served



Partners

AIRBUS

QINETIQ

SIEMENS

 **DARKTRACE**

 **Microsoft**

 **VMWARE**

 **DELL**

 **SAP**

ORACLE

 **FIWARE**
FOUNDATION

Manufacturing



\$175bn
Market size

Industry 4.0

Increased personalization
of products

Smart/autonomous
products



1 Support Next-Gen R&D
& manufacturing

2 Develop digital products
& services

3 Enhance trust & compliance

Expertise

30 thousand manufacturing-
business technologists

5 global competence centers

Solutions/IP

 **MindSphere**
by SIEMENS



e-Payment
platforms

€330m

joint R&D investments
with Siemens

Experience

#1 IT service provider in
Manufacturing in Europe

B/S/H/



Atlas Copco

PHILIPS

Dräger



Schneider
Electric



AKZO NOBEL

NXP

BOSCH

AIRBUS

Partners

SIEMENS



Wonderware

Materialise
innovators you can count on

SAP

Manufacturing customer success story

MindSphere deployed at a global leading automotive manufacturer



Consolidation in
MindSphere platform of
IoT data coming from
plant equipment

Potential to use **advanced functionalities**, e.g.,
analytical scenarios and
predictive maintenance, to
optimize manufacturing
activities



**Increase
machine uptime
by 5-10%**

**Increase output
by 10%**

**Reduce errors
by up to 50-
80%**

**Reduce cost by
5-10%**

**React up to 3
times faster**

Financial Services & Insurance



\$333bn
Market size

Transformation of
customer journey

Development of open
ecosystems

Acceleration of on-demand
platform services

Regulatory
requirements



1 Deliver connected Digital
Banking and Insurance

2 Enhance operational
excellence

3 Mitigate cybersecurity
risks & meet regulatory
requirements

Expertise

16 thousand banking
experts

5 thousand
Insurance experts

Solutions/IP

SyntBots™
Automation NEX



ATM

Exit Legacy
Powered by
SYNTEL

Experience

13 of 20 leading
banks



15 of 30 top
insurances



Partners

SAPIENS

SimCorp

DB BANKING
TECHNOLOGY

CIRCEO



Duck Creek
Technologies

PAYTWEAK

NGDATA

Financial Services & Insurance customer success story

Atos Life & Pension 3.0 solution deployed at Aegon



Establishing an **inclusive culture of transformation**



Enhancing customer intimacy through integrated CX channels



Innovating as a standard – building in additional functionality



Re-platforming and cloudification for optimized operations



Digitize business processes for Protection, Life and Pensions



Automating repetitive and lower-value-added tasks

Digitizing 1.4m L&P Policies

Reduce costs by 46% in 10 years

Outcomes-based partnership

Cutting edge CX Lab/Academy to drive channel shift and digital self service adoption

Adapting our customer engagement model for the next wave



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