Atos Group

Q3 2026 Performance

October 21, 2026



Today’s presenters



Philippe Salle
Group Chairman & CEO



Jacques-François de Prest
Group CFO

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Today’s agenda

- Q3 2026
  Business highlights
- Q3 2026
  Operational performance
- Q3 2026
  Financial results
- Outlook
- Questions & Answers



01

Q3 2026
Business highlights

Philippe Salle
Group Chairman & CEO

Q3 2026: another quarter of strong execution, on track to achieve full-year targets

Continued sequential performance improvement
Full-year targets confirmed

Genesis continues to outperform its initial objectives

Commercial activity reflecting usual summer seasonality

Acceleration in the Group's strategic technology pillars

Key milestone reached: operations turn cash positive in Q3 for the first time since Genesis launch

REVENUE

€1,642 m

at current perimeter[1]
(-2.4% yoy organic growth for Atos & Eviden SBUs)

ORDER ENTRY

€1,024 m

Book-to-bill: 62%
(down 8 pts from 70% in Q3 25)

NET CHANGE IN CASH[2]

c.€44 m

(incl. c. €50 m restructuring)

LIQUIDITY

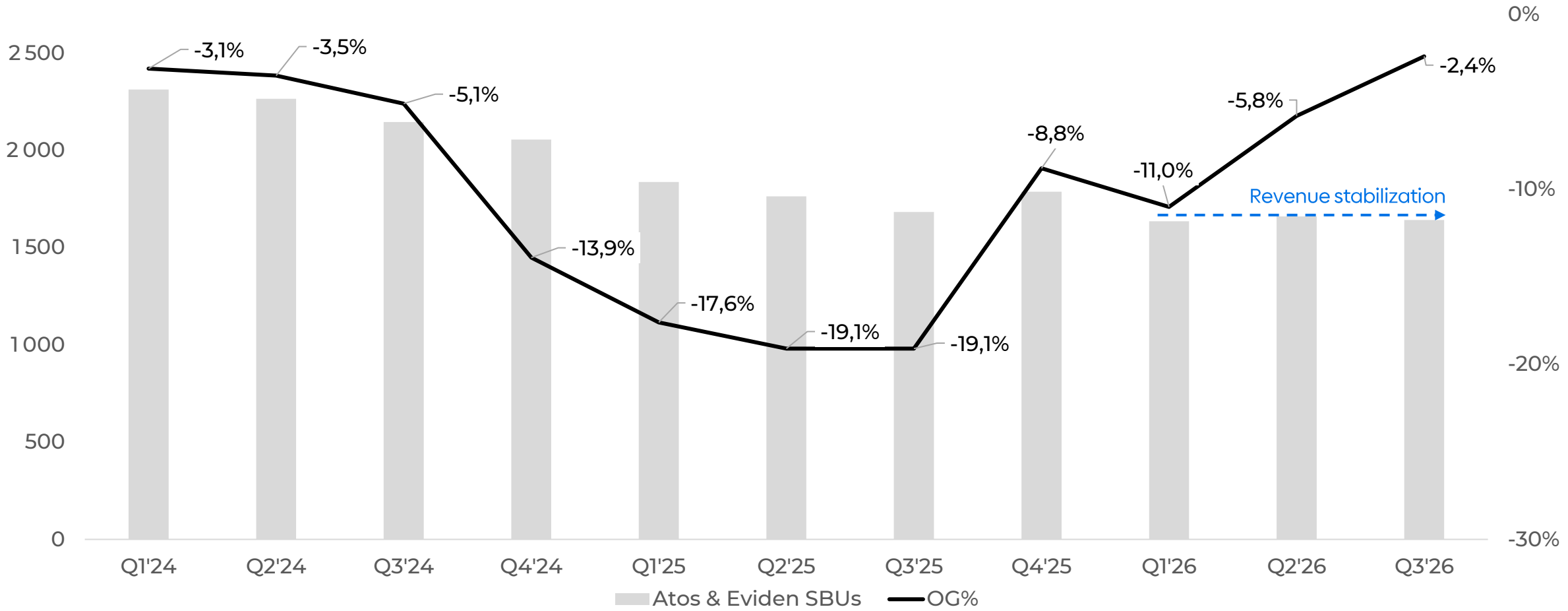
€966 m

at September 30, 2026

Notes: (1) Current perimeter excludes all divested operations (Bull, Ideal GRP and South America activities) for the period ; (2) Net change in cash is obtained by deducting from Free Cash Flow the impact of non-structural working capital optimization actions, such as unsolicited customer payments received before the invoice due date. Net change in cash excludes: i/ net financial debt repayments; ii/ net cash inflows (outflows) from acquisitions or disposals of businesses or entities; iii/ capital increases, share buybacks and dividends paid to shareholders and non-controlling interests; iv/ cash movements relating to other financial assets and liabilities, such as deposits on escrow accounts used as cash collateral; and v/ foreign exchange impacts on cash.

Stabilization achieved with third consecutive quarter of improvement in the organic growth trajectory

Atos & Eviden SBUs revenue and organic growth by quarter (in € million, at current perimeter[1])



Notes: (1) Current perimeter corresponds to Group's baseline for establishing future ambition: for all years, excluding the estimated impact of Advanced Computing activities, South America operations and Ideal GRP divestitures.

Genesis still outperforming as growth complements simplification

› 124% target savings completed

Growth & offering portfolio management

- Accelerated **initiatives** to support the **three strategic technology growth pillars** presented at FY 2025 (agentic AI, sovereign and cyber)
- **Continued portfolio enablement**, supported by the new commercial Target Operating Model, with c. 40% of planned sessions delivered across geographies
- **Strengthened strategic partner engagement**, with a satisfaction score of 8.1/10, highlighting strong confidence in future joint growth opportunities

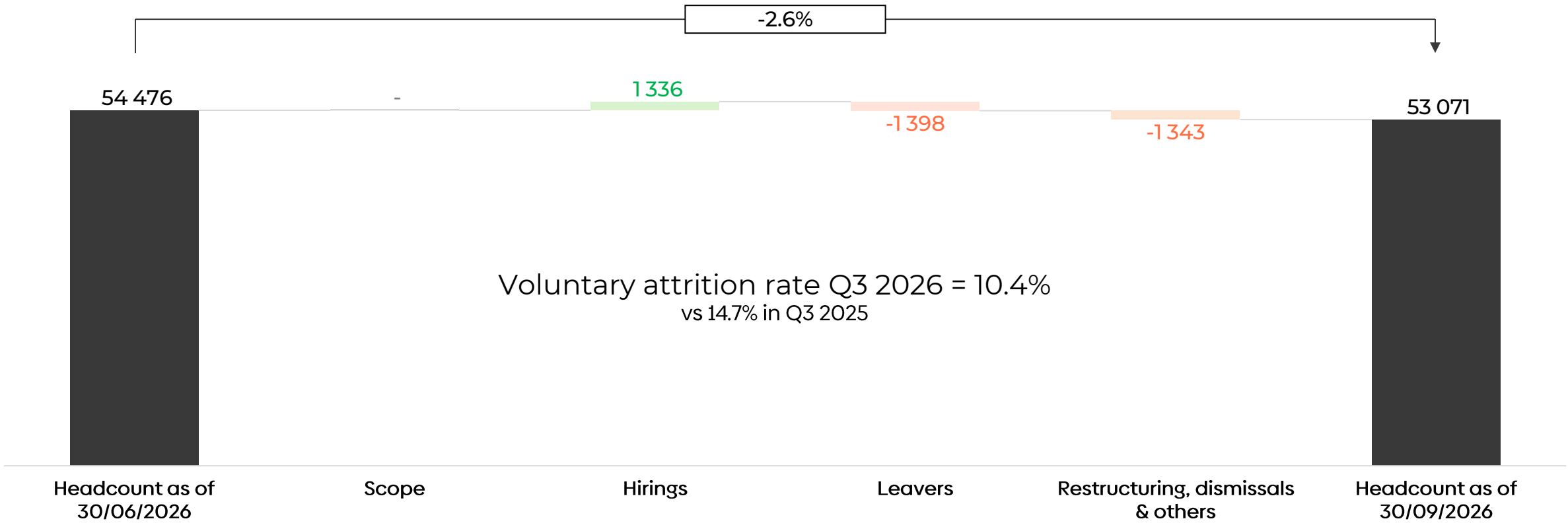
Microsoft DELL Google Cloud SAP servicenow IBM aws

Simplification

- Further progress in **restructuring plan execution**, with **c. €50m associated cash out** during the quarter
- **Billability rate** c. 84% at the end of the quarter
- Continued geographic **portfolio simplification** in Central and Eastern Europe
- Trim and simplification of **bid process** to streamline administrative processes



Workforce evolution reflecting Genesis execution



Solid commercial activity despite usual summer seasonality

Book-to-bill

at **62%** in Q3 2026
down c. 7 pts

(vs 70% Q3 2025)
due to the lack of large deal signature opportunities during the quarter

Qualified pipeline

modest increase
during Q3 2026

after €1,660m up in H1 2026

Renewal rate

Growing YTD at **c. 93%**

(vs. 91% Q3 YTD 2025)

Major contract wins* and renewals in Q3 2026

Exclusive partnership
EDF - France's leading energy company

Operational info. mngt system for nuclear power plants
Digital Apps. & Amplify, Data&AI, C&MI, DWP, Cyber
15 years

Contract win
Metropolitan Police Service

Apps management services contract
Digital Apps, Cyber
Up to £350M
6 years

Framework agreement
HM Revenue & Customs (HMRC)

Low-code platform leadership services
Digital Apps
Up to £78M
3 years + 1 + 1 optional

Contract win
European Space Operator renewal

Eviden SkyMon NG seen as most advanced satellite monitoring
Mission-Critical Systems
Up to 2 M€
Multiyears

Contract win
Barcelona City Council (Spain)

AI-powered digital employee support
Digital Apps.
3+1+1 years

Contract win
Oriola corporation

SAP modernization & data analytics
Smart platforms
€15M
Multi-years

Notes: (*) The amounts indicated represent a maximum cap over the term of the agreement, rather than a firm guaranteed amount.

Atos strategic pillars strong momentum

Agentic AI

From pilots to production: agentic AI scaling across clients, partners and platforms

Atos Genesis Intelligence

State of the art end-to-end Sovereign AI Suite

Recognized for "Excellence in Agentic AI Deployment"

Turning autonomous AI into **a secure, production-grade enterprise capability**
2026 Silver Stevie® Award winner

Digital Sovereignty

Launched Atos Sovereign Cloud, designed and engineered in the EU, and widened our sovereign ecosystem

SAP

Sovereign Cloud Partner in Germany, France, the Netherlands and the UK

STACKIT
A Brand of Schwarz Digits

Integrator and reseller of the European **STACKIT sovereign cloud**

Cybersecurity

Certified, AI-enabled security operations for defence and highly regulated sectors

CMMC 2.0 Level 2

Perfect 110/110 score for our North America MDR SOC, ahead of the US DoD Nov 2026 mandate

Gulf Cyberfender Hub (GCH): UAE SOC

New AI-driven Dubai SOC with local data residency and agentic AI for faster threat detection and response

Industry Analyst Recognitions Q3 2026

- **Gartner**
  A Tech Innovator in GenAI Computer Vision, 2026
- **IDC**
  A Leader in European GRC Services 2026
  A Leader in Managed Security Services (MSS), Middle East, 2026
- **ISG**
  A Leader in Agentic AI Services Global region 2026
- **KuppingerCole**
  A Leader in Identity Governance and Administration (IGA), 2026



WINNER 2026 IDC AI Innovation Award
Sovereign AI Agent for Engineering R&D, developed jointly by Atos and Flender China **recognized as the Best Agentic AI Practice**

Three strategic pillars. One consistent story of execution.

Successfully delivering value to our customers

SPIE

One of Europe's leading multi-technical services providers is scaling AI on an Atos-built enterprise Agentic AI platform.

In 10 weeks:
- **Double weekly active users**
- **3.6x AI interactions to 42,000+**

Agentic AI in production: IT support, knowledge management, field operations

FLENDER

Global drive-systems maker runs an Atos sovereign AI agent for engineering R&D, fully on-premises to protect its IP:
- **80% less engineering effort**
- **6x productivity**
- **2,000 hours saved a year**

Sovereign agentic AI; winner of the 2026 IDC China Best Agentic AI Practice Award

UGAP

France's national public procurement agency selected the Atos, Open and Thales consortium for **two four-year national cloud and infrastructure frameworks**

Atos leads the cloud lot; secure, sovereign multi-cloud with AIOps

BARCELONA CITY COUNCIL

Atos to transform technology services for municipal employees through automation, data analytics, generative AI, digital experience, self-service and advanced knowledge mgmt.
- **12 initiatives to support proactive and predictive management.**

Goal: improve 71% of SLA indicators starting in the second year

Global automotive manufacturer

Atos' AI-powered Intelligent Quality Engineering brings agentic testing to critical production apps:
- **35% less testing effort**
- **30% better quality**
- **40% faster time-to-market**

Agentic testing at scale across mission-critical applications

EU Lottery Operator

Selected Eviden Cyber Products, SaaS data protection and trusted time-stamping, to **secure the integrity of its digital gaming transactions**

Five-year agreement, regulated sector

HFS

Atos "has spent decades running technology in regulated industries, including air traffic control, defense, and critical national infrastructure. In those environments, control and accountability are the prerequisites, not a later addition. That heritage is harder to replicate than any single piece of technology."
Joel Martin, Executive Research Leader, HFS

ISG

"Atos engineers agentic systems around governed enterprise execution, connecting AI decisions with workflows, data and business systems while maintaining defined control boundaries for delegated operational work"
Gowtham Sampat, Assistant Director & Principal Analyst, ISG

Legend: Strategic Pillars

A Agentic AI C Cybersecurity S Sovereignity

Atos Client Zero: internal adoption of agentic AI

Enterprise capability and value realization across internal operations

Enterprise capability progress

Strategy

SAIL leadership cohort supporting executive stewardship

Governance

AI Transformation Hub and 'AI'dea intake

Change management & culture

Maturity assessment v2. 800+ AI champions across functions/geos

Platform architecture

1st French HQ-ed firm on Microsoft Frontier Suite and data modernization using Atos IP

AI literacy & talent amplification

4K+ Copilot certifications and a global AI hackathon

Value realization

Enterprise Compliance & Certifications (ECC)

- **20+ AI agents** for enterprise quality, compliance and audits.
- **70–90% less effort** in selected tasks.
- **3,000+ productivity hours/year** estimated.
- Human review, approval and accountability retained.

RFP Manager

- **~2,000 tenders/month** screened with **90% relevance accuracy.**
- **Bid/no-bid in 2 days vs 2 weeks.**
- **€0.5bn+ TCV** pursued in 6 months after AI screening.
- **400+ users** across all business lines. In production in Germany.

AutogenAI

- **GenAI proposal writing** supports analysis, drafting and review.
- **20% productivity increase.**
- **500+ users enabled** across the deal lifecycle.
- **100% of targeted global users trained**.

1,000+ use cases in development | **198** live use cases deployed*

LIVE AGENTS CertInsight · Order-to-Cash · Support Atos Risk AuditMate · Finance Library Assistant · Doc Repo

Notes: (*) Built with both internal tools/platforms and tools/platforms across our partner ecosystem

Best-in-class cyber resilience at machine speed

Specialized AI agents collaborate across the cyber defense lifecycle, with governance and human control built in

CLIENT CONTEXT

Environment | Assets | Policies | Telemetry

THREAT INTELLIGENCE

CTI platform | Atos Threat Research Center | Adversary insights

AI AGENTS ACROSS THE CYBER DEFENSE LIFECYCLE

IDENTIFY EXPOSURE

AI Exposure Agent

Prioritize based on exploitable risk

VALIDATE ATTACK PATH

AI Offensive Tester

Validates attack paths

ENGINEER DETECTION

AI Detection Engineer

Creates and tunes detections

TRIAGE & ENRICH

AI SOC Analyst

Investigates alerts autonomously

CONTAIN THREAT

AI SecOps Response Agent

Mitigates risk and contains

Up to 80% acceleration measured

End-to-end across the cyber defense lifecycle

TRUST & CONTROL BUILT INTO THE AGENTIC WORKFLOW

Agent Guard

Monitors every agent action, enforces policies and maintains audit trails

Cyber expert

Approves key actions · Human oversight

Responsible AI

Critical safeguards for autonomous actions

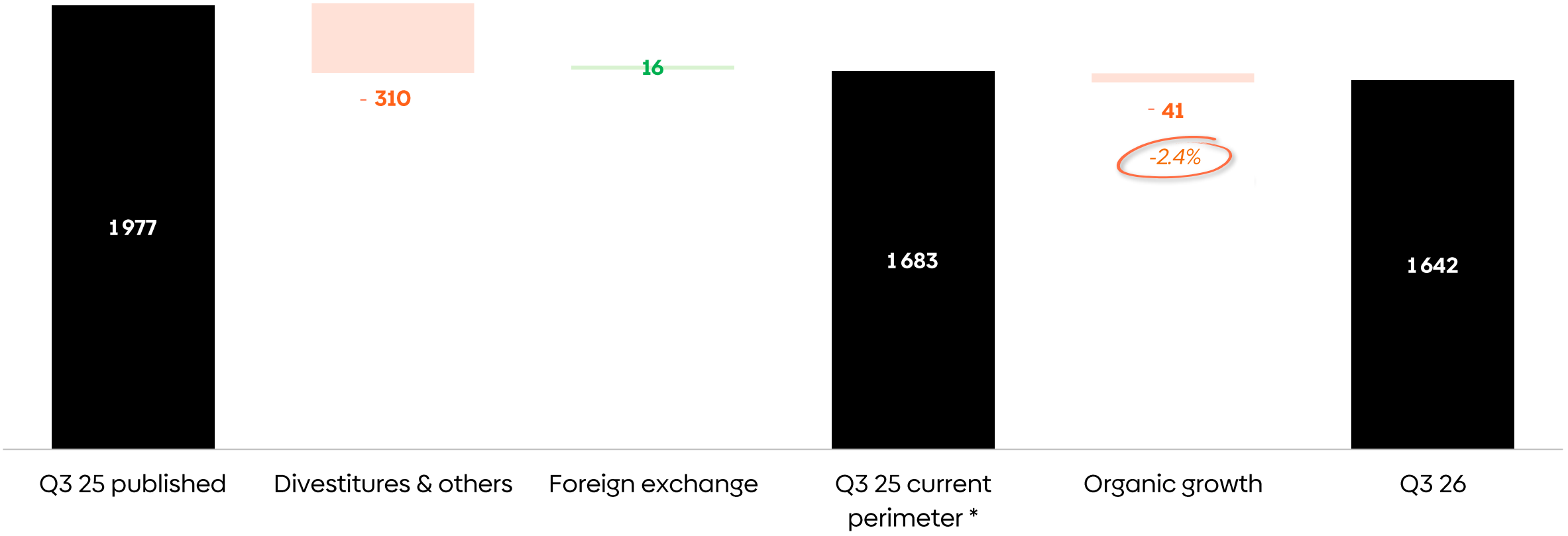
02

Q3 2026 Operational performance

Philippe Salle
Group Chairman & CEO

Q3 2026 revenue evolution

Atos & Eviden SBUs revenue (Q3, in € million, 2025-2026)



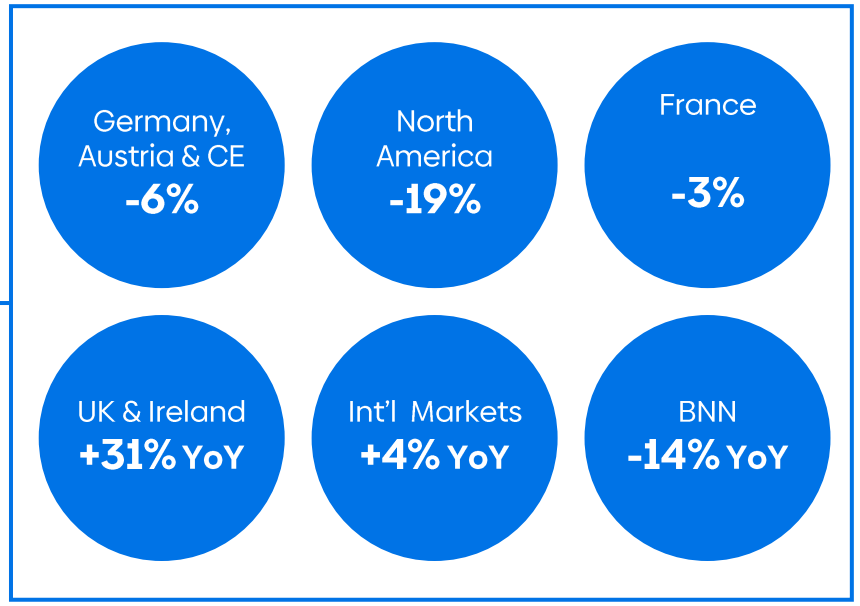
Notes: (*) At September 2026 average exchange rates perimeter

Group organic growth & revenue by geo

Q3 organic growth trend

ATOS SBU
-2.0% YoY

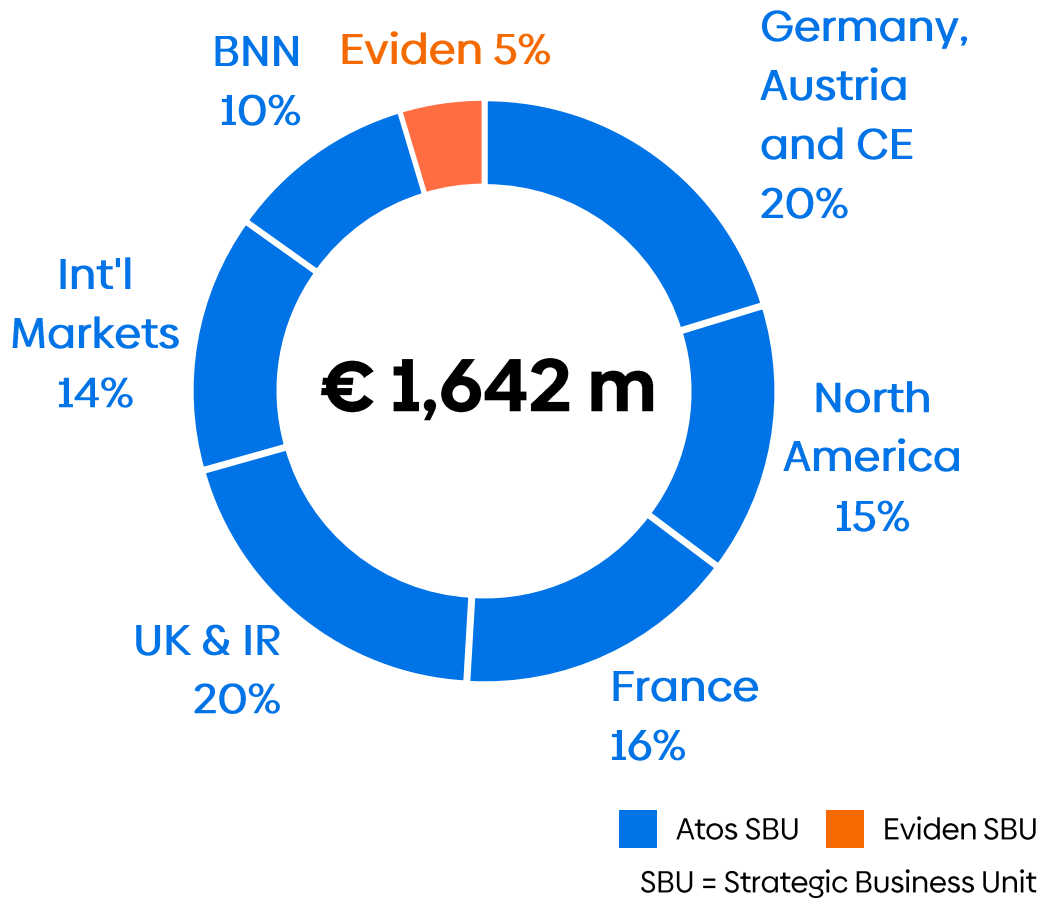
Eviden SBU
+5.1%* YoY



Atos SBU: improving sequentially and reflecting the positive impact of commercial discipline, cross-selling initiatives and more selective contract portfolio

Eviden SBU: continued positive momentum, in most product lines

Q3 revenue mix

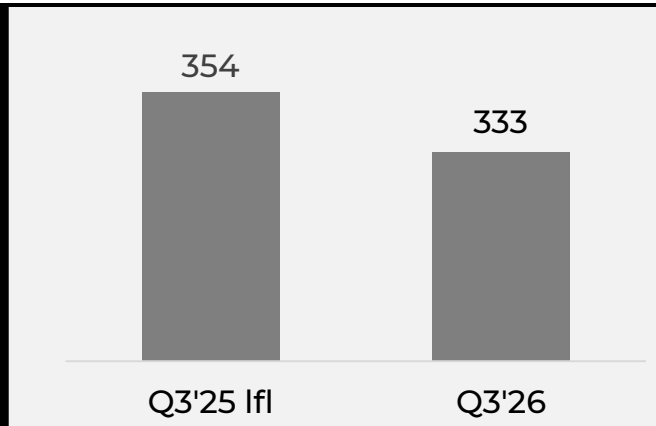


SBU = Strategic Business Unit

Notes: (*) Excluding one-offs restatements following Bull's deconsolidation and revenue recognition timing effects

Atos – Germany, Austria & Central Europe third quarter of improvement in organic growth

Revenue (€m)



-6.1% organic growth yoy in Q3 26:

- A few large client-ramp downs following insourcing strategies
- Managed exit of low-profitability contracts
- Partially offset by successful fertilization and cross selling at existing clients
- Partially offset by renewed relations with former clients

Business highlights in Q3 2026

✓ **Contract win**
Leading engineering & technical services company in Germany

AI-powered digital workplace services
Digital workplace
c. €23M
5 years

✓ **Contract win**
Zakład Ubezpieczeń Społecznych – Polish social insurance institution

SAP maintenance and operations*
Smart platforms
c. €1M
5 years

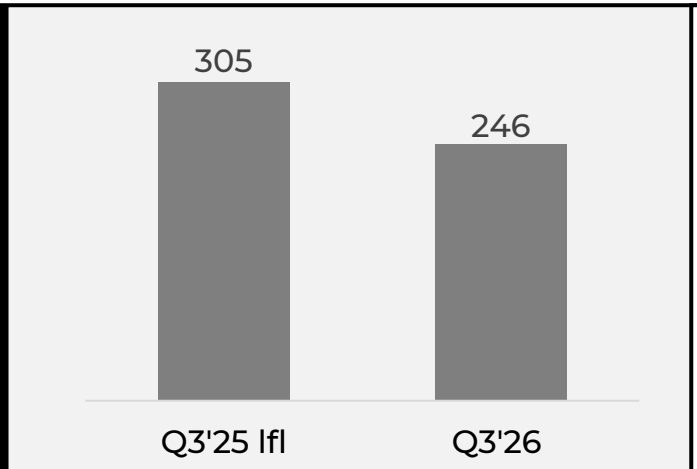
✓ **Contract win**
Leading Austrian Foodservice Wholesaler

IT operations optimization program
C&MI, Digital Apps
€6.5M
4 years

Notes: (*) Consortium with BPX S.A.

Atos - North America: stabilized revenue with visibly improving commercial momentum, incl. new logos

Revenue (€m)



-19.3% organic growth yoy in Q3 26:

- Stabilization of the quarterly revenues since the start of the year
- Year-on-year decline mostly driven by low profitability contract exits and a scope reduction at existing clients
- Visibly improving commercial momentum, with significantly growing qualified pipeline year-on-year, including related to new logos

Business highlights in Q3 2026

Contract win
Leading global elevator manufacturer

ServiceNow licensing for 70,000 employees
Digital Apps.
$10.5M
3 years

Contract win
Regional property casualty insurer

Consumption-based mainframe services
C&MI
$7.9M
4+1 years

Contract win
Leading global asset servicing provider

AI-driven cloud & data modernization
Data & AI
$2.2M
1+ year

Award
Gold medals with North America-specific ISG Provider Lens reports

Leader ISG AI-Driven ADM
Digital Apps.

US Public sector services

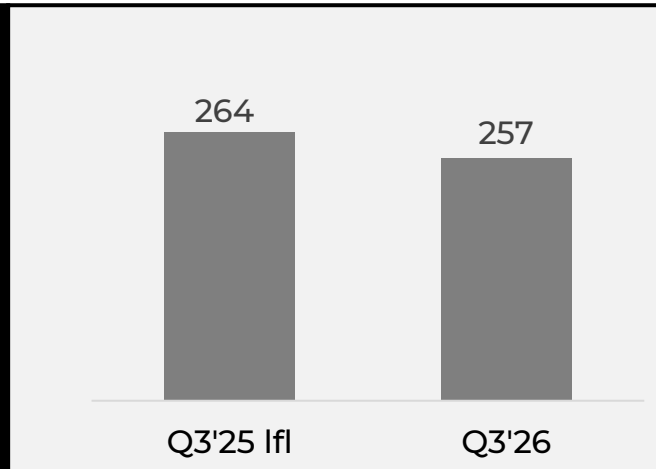
Influence
Engaged public sector leaders at various local conferences*

Influence
Sponsored InsureTech Connect event, at Las Vegas in September 2026

Notes: (*) Texas State Agency Business Administrators' Association, Texas Association of State Systems for Computing and Communications & Commonwealth of Virginia Innovative Technology Symposium

Atos – France: continued growth momentum amid public sector softness

Revenue (€m)



-2.7% organic growth yoy in Q3 26:

- New positive inflexion in the growth curve
- Public sector remaining soft whereas other sectors have started to recover

Business highlights in Q3 2026

Framework agreement
UGAP – public sector procurement agency

Trusted cloud & infra. transformation
C&MI
4 years

Reasearch & Inno.
Atos' scientific committee with Atos leaders & external experts

Drive innovation in open, sovereign & responsible AI

Deployment
Région Île-de-France

e-GF, financial mngt. platform deployment
Digital applications
2.5 years

Exclusive partnership
EDF - France's leading energy company

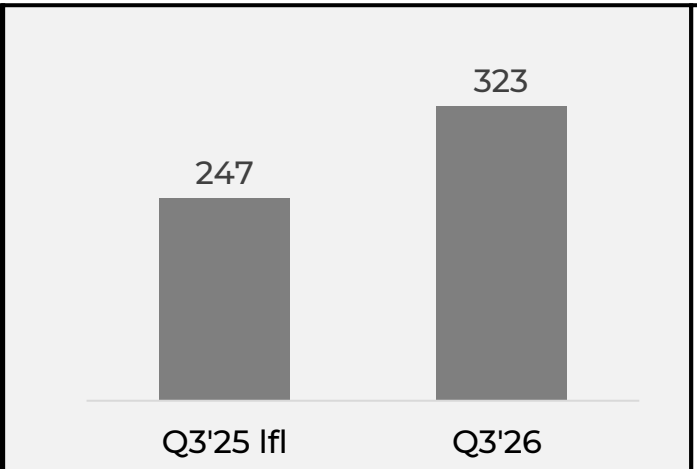
Operational info. mngt system for nuclear power plants
Digital Apps. & Amplify, Data&AI, C&MI, Digital Worplace, Cyber
15 years

Influence
French maritime cyber alliance

Joined cybersecurity resilience network
Cyber

Atos - UK & Ireland: fourth consecutive quarter of organic growth, at exceptionally high level

Revenue (€m)



+30.8% organic growth yoy in Q3 26:

- 4th consecutive quarter of growth (c. +8% quarter-on-quarter)
- High and unrepeatable level of growth was due to:
  - low comps in the same period last year
  - continued strong momentum in 2026, boosted by new wins in the region

Business highlights in Q3 2026

Contract win
Metropolitan Police Service

Apps management services contract
Digital Apps, Cyber
Up to £350M
6 years

Framework agreement
HM Revenue & Customs (HMRC)

Low-code platform leadership services
Digital Apps
Up to £78M
3 years + 1 + 1 optional

Partnership
Forfield - UK defence supply chain alliance

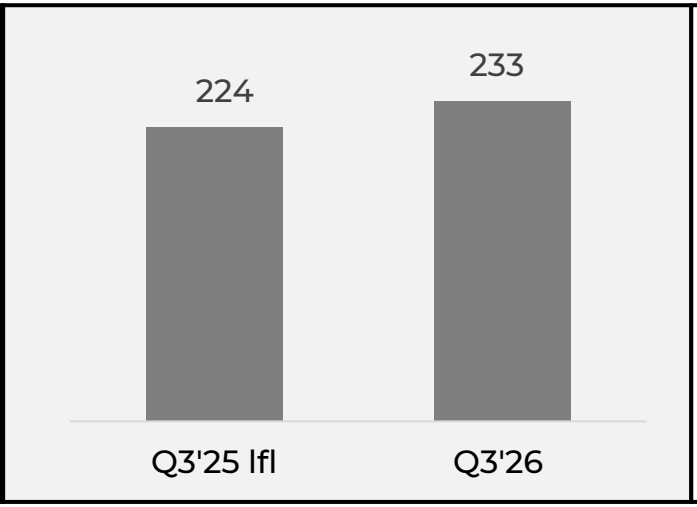
Securing digital systems & cyber
Digital Apps & Cyber

Influence
Future Readiness - AI literacy & readiness programme to students & staff

Provide funding for AI skills & critical thinking development

Atos - International Markets: back to growth for first time since Genesis launch, with positive momentum across regions

Revenue (€m)



+4.0% organic growth yoy in Q3 26:

- Broad-based performance, with most regions growing and Switzerland, Middle East & Turkey, and Southeast Europe delivering double-digit growth
- APAC impacted by expected ramp-down of a large contract following the customer's strategic insourcing of part of its IT operations

Business highlights in Q3 2026

Contract win
Barcelona City Council (Spain)

AI-powered digital employee support
Digital Apps.
3+1+1 years

Contracts wins
Several banks in Hong Kong

Business-critical mainframe mng. services
C&MI
Over €90M
3 years

Framework agreement
Migros (Switzerland)

Automated & trusted managed services
C&MI
3 years

Portfolio
Security Operations Center (UAE) opening

Next-gen AI-powered cyber resilience
With GCH

Award
IDC AI Innovation Award (China)

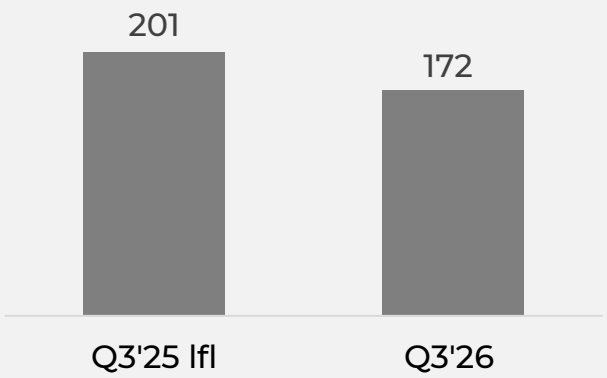
Sovereign AI agent for Engineering R&D
With Flender China manufacturer

Award
Whiteline Research study (Spain)

#1 in Digital workplace, #3 in C&MI

Atos - Belux, Netherlands & Nordics: active portfolio management and good traction in upselling

Revenue (€m)



-14.2% organic growth yoy in Q3 26:

- Managed exits from low-profitability contracts
- Ramp-downs on existing clients
- Churn partially offset by growing activity at existing clients

Business highlights in Q3 2026

Contract win
Oriola corporation

SAP modernization & data analytics
Smart platforms
€15M
Multi-years

Contract win
DSM Group Business Services B.V.

SAP TAM services for Geneva DC
Smart platforms
€1.3M
Multi-years

Contract win
Region Hovestaden

SAP ERP services and licenses
Smart Platforms
€16.3M
N/A

Award
MT1000 2026 - Dutch business services provider ranking

#1 in the Netherlands for IT Staffing & Outsourcing

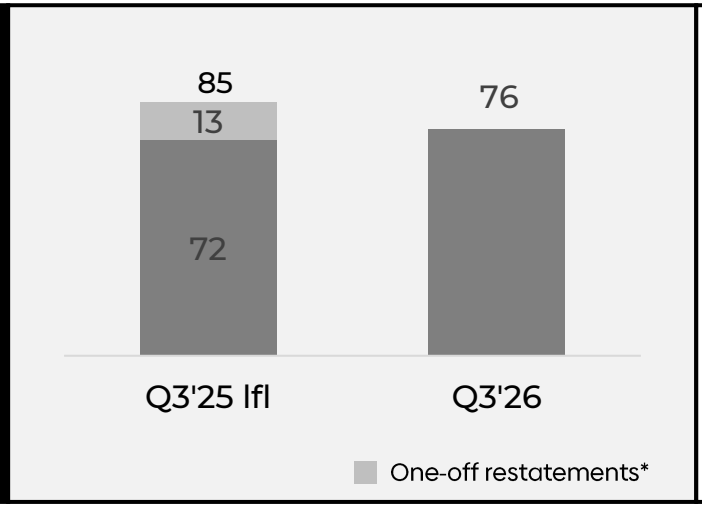
Partnership
Brainport Partnerfonds

Strategic regional innovation ecosystem partnership

Influence
CyberSec Netherlands participation

Eviden: positive underlying growth for the second consecutive quarter

Revenue (€m)



+5.1% underlying organic* growth yoy in Q3 26:

- Growth in Defense activities, particularly in Mission-critical systems & Cyber
- Cyber product line growing year-on-year for the first time since the launch of Genesis
- Slowdown in Middle East, esp. in Vision AI

Business highlights in Q3 2026

Recognition
Gartner sees Eviden as Top Tech Innovator

Ipsotek ViSuite as Cutting-Edge application in Gartner Tech Innovators in Gen AI Computer Vision 2026
Vision AI

Contract win
Leading automotive manufacturer

Renewal of Eviden DirX Identify and Access Management
Cyber Security Products
Up to €1M
1 years

Contract win
European Gaming Operator

SaaS Data protection and time-stamping of gaming operations
Cyber Security Products
Up to €1M, > 5 years

Contract win
France Central Gov. entity

Eviden CardOS token technology adopted in France
Cyber Security Products
Up to €1M

Contract win
European Space Operator renewal

Eviden SkyMon NG seen as the most advanced satellite monitoring
Mission-Critical Systems
Up to €2M
Multiyears

Portfolio
Cisco chose Eviden Vision AI

Eviden Vision AI as first AI Computer Vision ISV for Cisco Secure AI factory
Vision AI

Notes: (*) Excluding one-offs restatements following Bull's deconsolidation and revenue recognition timing effects

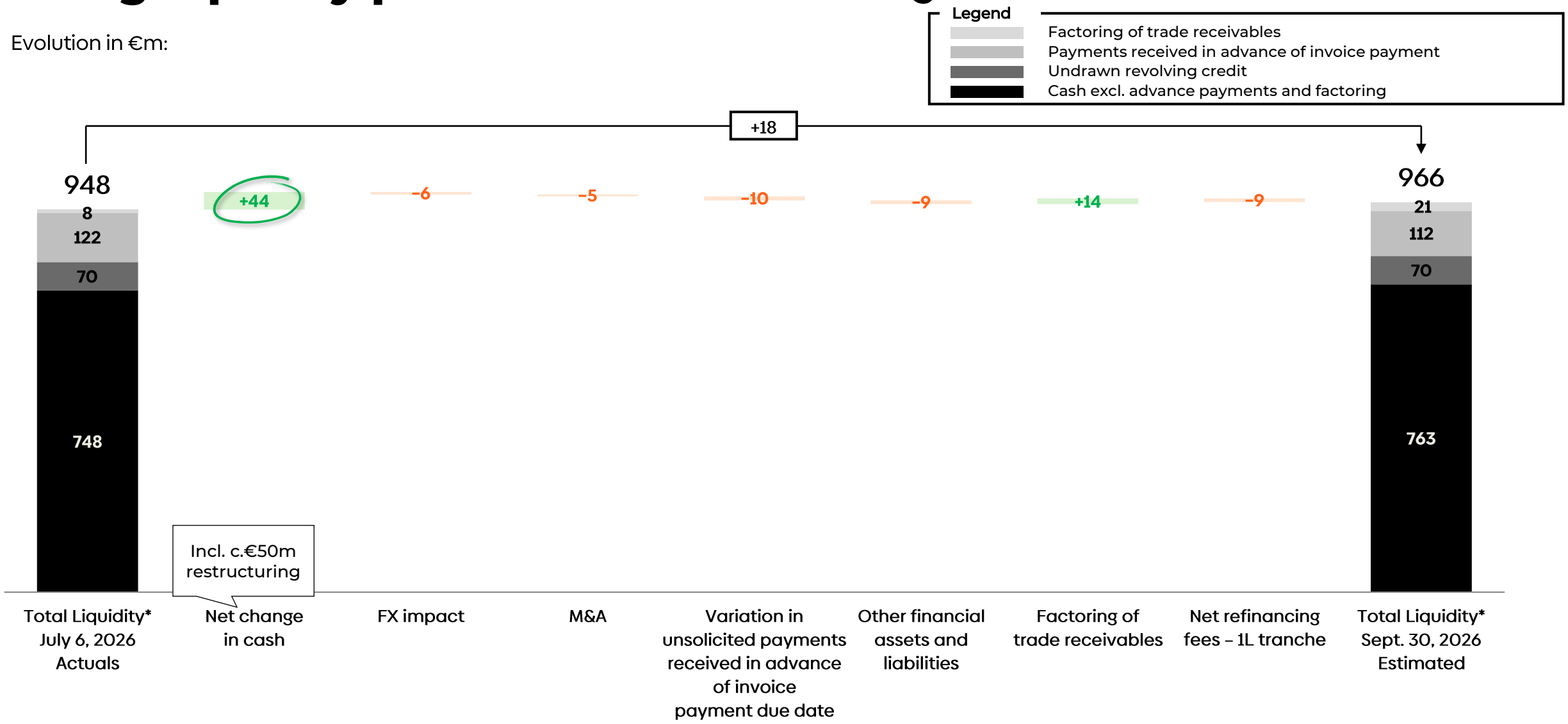
03

Q3 2026 Financial Results

Jacques-François de Prest
Group CFO

Strong liquidity position at the end of Q3

Evolution in €m:



Notes: (*) Liquidity is defined as the sum of (i) the consolidated cash and cash-equivalent position of the Group and (ii) the amounts available under any undrawn committed facilities (including committed overdrafts). Consolidated cash and cash-equivalent includes trapped cash and unpooled cash and excludes cash held in escrow accounts in order to provide cash collateral.

04

Outlook

Philippe Salle
Group Chairman & CEO

Confirmed financial ambition

2026

Stabilization

Organic growth at c. -5%
(Atos & Eviden SBUs)

~7% Operating Margin

Positive net change in cash[1]

2028

Sustainable cash generation

Organic growth acceleration
5-7%
2026-2028 revenue CAGR

Further cost optimization & profitable growth
c.10% operating margin

Visible deleveraging
<1.5x net debt/OMDAL[2]

Notes: Group's baseline for establishing future ambition: for all years, excluding the estimated impact of Advanced Computing activities, South America operations and Ideal GRP divestitures
Additional notes: (1) Net change in cash is obtained by deducting from Free Cash Flow the impact of non-structural working capital optimization actions, such as unsolicited customer payments received before the invoice due date. Net change in cash excludes: i/ net financial debt repayments; ii/ net cash inflows (outflows) from acquisitions or disposals of businesses or entities; iii/ capital increases, share buybacks and dividends paid to shareholders and non-controlling interests; iv/ cash movements relating to other financial assets and liabilities, such as deposits on escrow accounts used as cash collateral; and v/ foreign exchange impacts on cash ; (2) OMDAL=Operating Margin before Depreciations, Amortization and Leases

Q&A Session

Q&A Session



Philippe Salle
Group Chairman & CEO



Jacques-François de Prest
Group CFO

Thank You!

For more information
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