Solutions30

Solutions for New Technologies

INVESTOR PRESENTATION

July 2019

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July 2019

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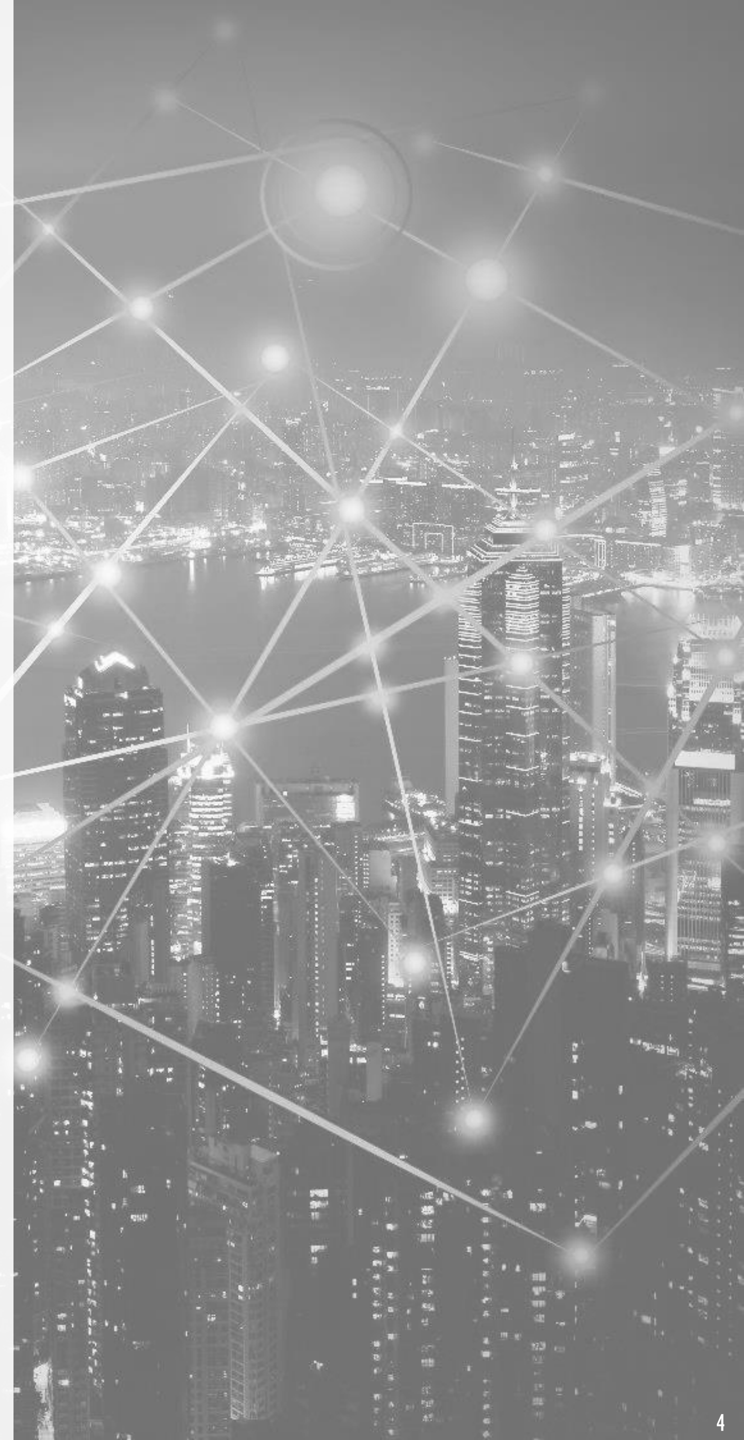
WHO WE ARE

A European leader for outsourced last digital mile solutions

MISSION

Solutions 30 is an integrated services company which aims at **making digital technologies easily accessible to everyone.**

We accelerate the transition to digital by **delivering 'last mile" solutions,** including connected equipment deployment and assistance. We provide **one-stop-shop solutions to end-clients,** both individuals and enterprises, **on behalf of large technology companies.**



INVESTMENT THESIS

#1 First mover advantage

- Solutions 30 was founded in 2003 and is a pioneer in the European market
- Our 'moat': long-term client relationships

#2 Low risk service business

- Asset light business with high returns on capital
- Large volumes of small individual jobs – no project work
- Flexible cost base

#3 Density is key

- Density in area coverage allows for good profitability
- First mover advantage means Solutions 30 has reached significant density in key markets

#4 Consolidation opportunity

- Highly fragmented market with strong incentives for consolidation
- Solutions 30 as the major consolidation driver, with significant value creation

#5 Geographical expansion

- Business model proven in France
- Easy to duplicate in new geographies (6 at the moment)
- Each geography has potential to be as large as France

SOLUTIONS 30 SNAPSHOT

MARKET LEADER

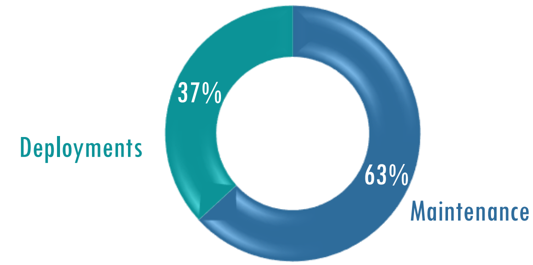
Solutions 30 is the clear European market leader in its segment.

> 8,000
personnel:
>5,000 employees and 3,000 referenced subcontractors

>50,000
Call-outs daily, more than 20 million since the company was founded

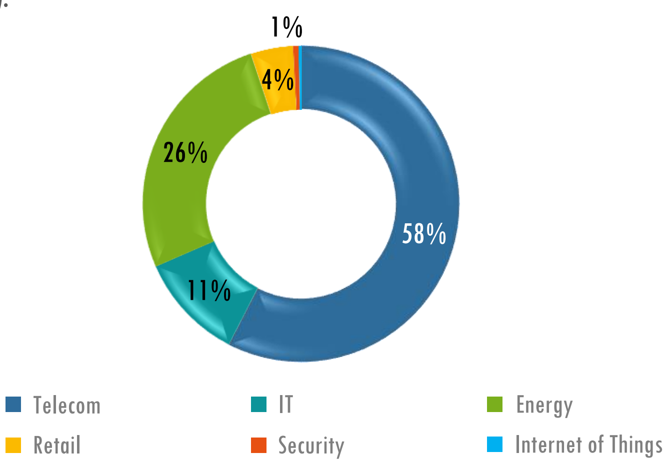
LARGE BASE OF RECURRING ACTIVITIES

Maintenance activities represent roughly 60% of Group revenues



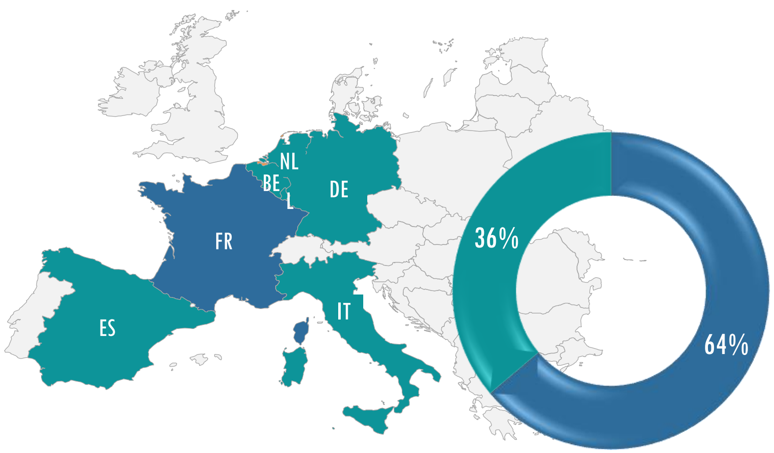
ACTIVE ACROSS VERTICALS

Solutions 30 delivers services to different markets (HY2019 French revenue):



ACTIVE IN SEVEN COUNTRIES

France remains the group's largest market, but the share of international business is constantly growing (FY2019 revenue).



THE MODEL: FULL-RANGE LAST MILE SERVICE SOLUTIONS

Outsourcing of a critical but non-core business to a trusted partner

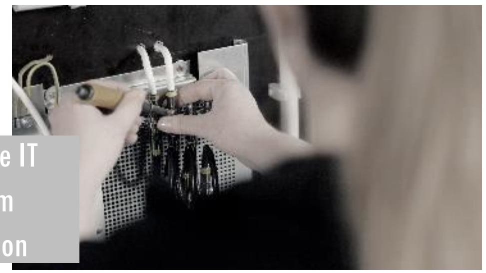
- Deliver service to end-customer faster, better and cheaper

Clients

Real—time IT platform integration

Last mile deployment and assistance

- Deploy internationally a scalable, profitable and repeatable B2B2C/ B2B model



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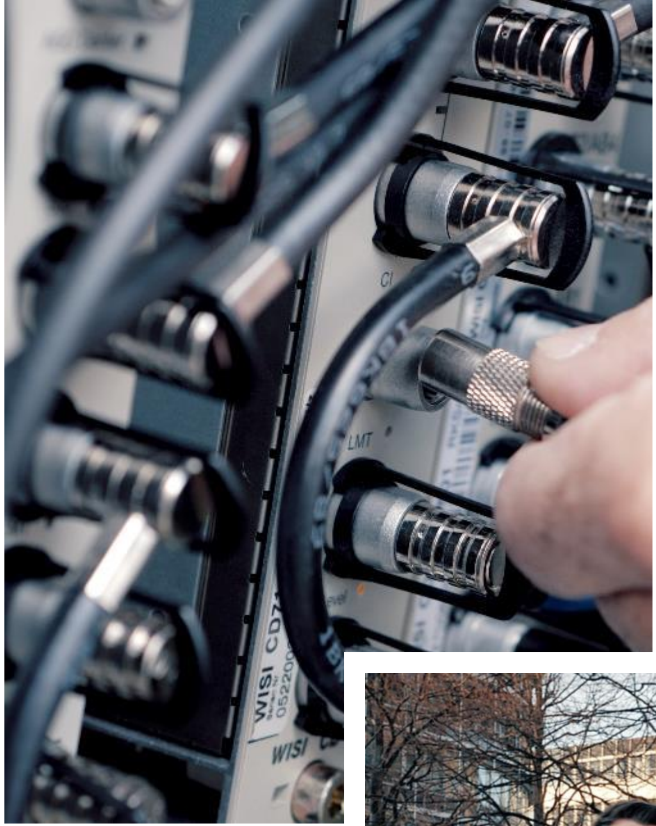
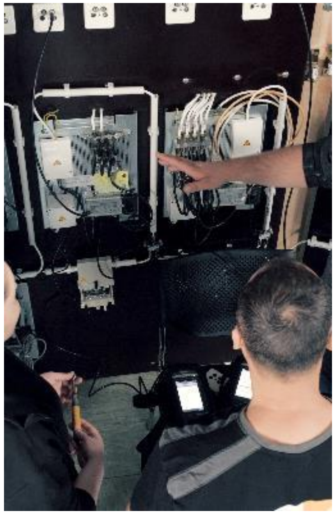
Maximizing customer satisfaction

- Reduce time to fix and idle waiting times for intervention with 24/7 support

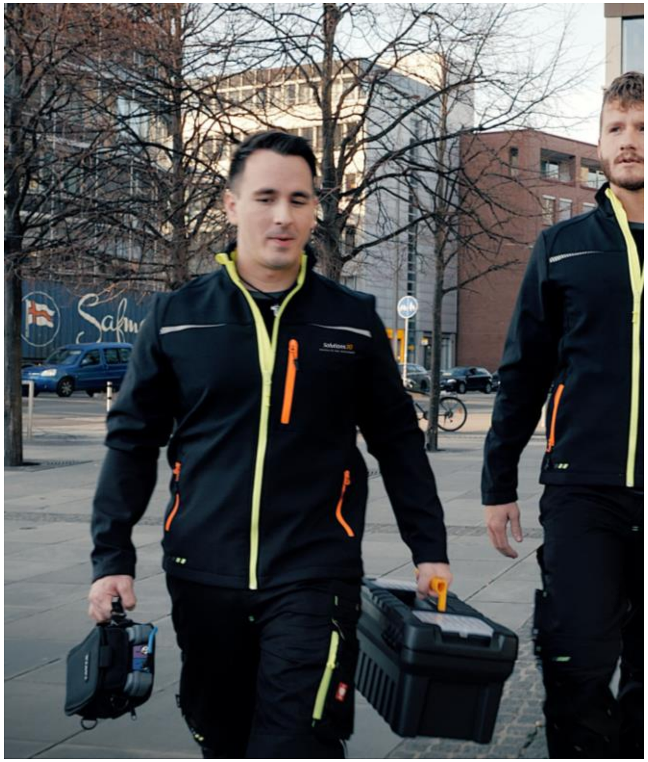
End customers

Small individual jobs:	High volumes:	Scalable and repeatable:	Low asset base:
Average 30-60 minutes per task	More than 50,000 call-outs daily	Standardised jobs, repetitive tasks	ROCE of >25%





A MARKET LEADER IN LAST MILE SERVICE SOLUTIONS



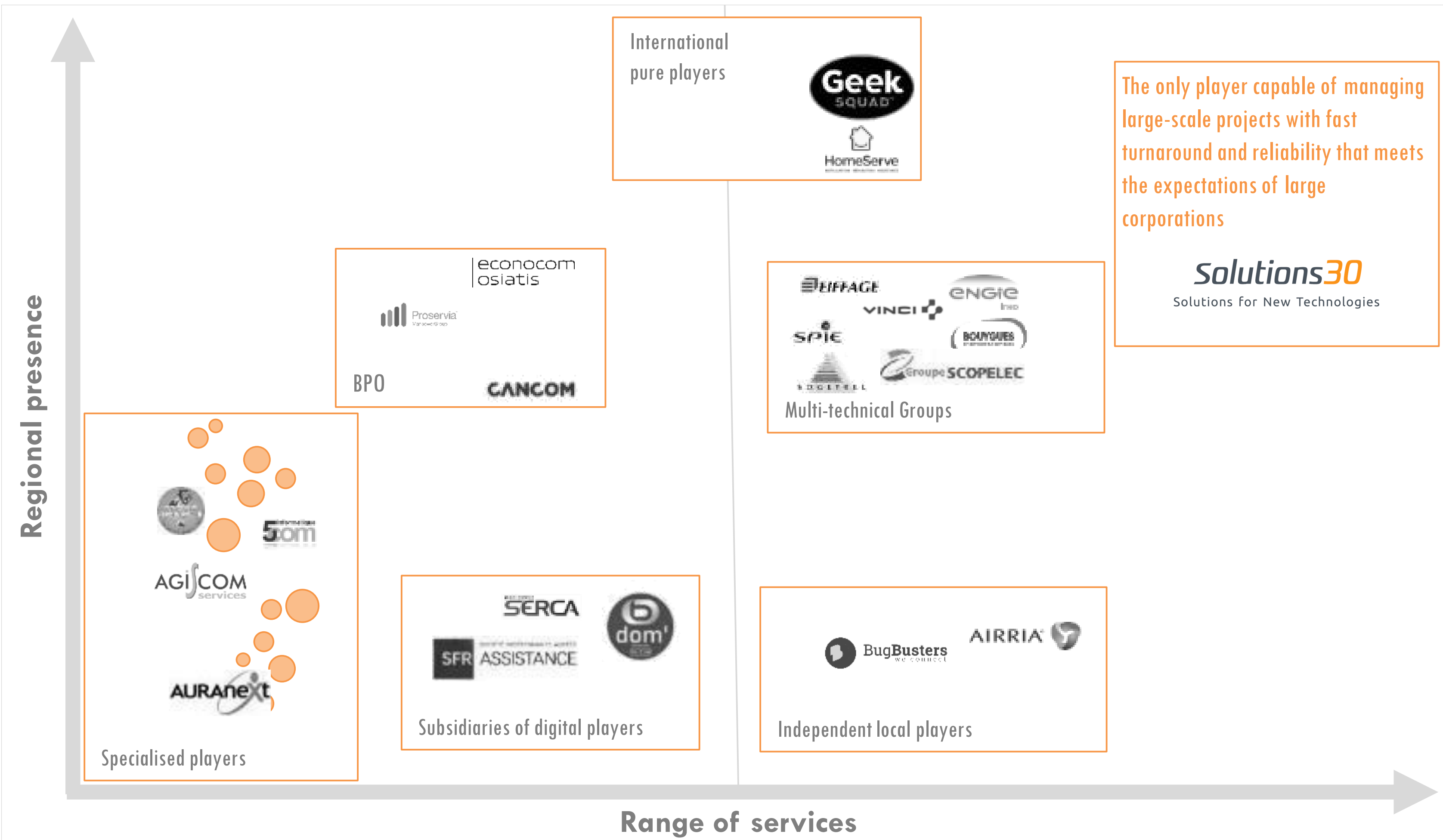
AN ESTABLISHED PORTFOLIO OF LOYAL CLIENTS

We provide a mission-critical service as a trusted partner. Our contracts are typically multi-year with a very high renewal rate.

	IT support and outsourcing Telecoms: High Speed Internet	Retail	Security	Energy	IoT
Year of market entry	2003	2011	2011	2009	2009

MARKET LEADER IN SIZE AND SERVICE OFFERING

A fragmented market in which Solutions 30 is the largest player



GOVERNANCE

SUPERVISORY BOARD

Alexander Sator
Chairman of the Supervisory Board since September 2018

Caroline Tissot
Member of the Supervisory Board since May 2017

Francesco Sefarini
Member of the Supervisory Board since May 2017

Paul Raguin
Member of the Supervisory Board since April 2018

Jean-Paul Cottet
Member of the Supervisory Board since April 2018

Yves Kerveillant
Member of the Supervisory Board since April 2019

Strategy Committee
J. P. Cottet

Remuneration & Nomination Committee
A. Sator

Audit Committee
Y. Kerveillant

GROUP MANAGEMENT BOARD

Gianbeppi Fortis,
Co-founder CEO

Karim Rachedi,
Co-founder COO
President of the Executive Committee

Amaury Boilot
Group CFO

EXECUTIVE COMMITTEE

Group

Tarik Azougaghi
VP Accounting & Control

Caroline Petit
Head of Legal

Joao Martinho
COO Deputy, VP Energy Europe

Franck D'Aloia
COO Deputy, VP integrations

Germany

Volker Meyer
CEO Germany

Jan Machuletz
COO Germany

Benelux

Koen Verbergt
Head of Unit-t

Christophe Vervroegen
Head of Belgium

Marco Bielen
Head of the Netherlands

Luc Brusselaers
Business Development Manager Benelux

Italy

Ruggero Fortis
CEO Italy

Giovanni Ragusa
COO Italy

France

Philippe Hedde
Business Dplt Manager France, VP IT Solutions France

Ali Sadkaoui
VP Telecom Solutions France

Jules Pereira Gomes
VP Retail Solutions France

Iberia

Juan Fandino
CEO Spain

Cesar Alonso
COO Spain

Pablo San José
VP Telecom Solutions Spain

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GROWTH STRATEGY

CAPITAL ALLOCATION PRIORITISES GROWTH TO REACH DOMINATING POSITION IN ALL THE GEOGRAPHIES

#1 Sector diversification

From IT to energy: supporting the digitisation of the economy in all sectors

#2 Geographical diversification

A strategy of selective geographical expansion: accessibility, market structure, growth potential and duplication of model

#3 A single organisation

An identical operational structure for the various business sectors and countries, maximizing synergies and economies of scale

#4 Market consolidation

Numerous opportunities to accelerate growth in a highly fragmented market where Solutions 30 is the natural consolidator

DRIVING CONSOLIDATION IS OUR BEST USE OF CAPITAL

- **Solutions 30 is the European leader and natural consolidator**
- **Track record of 31 successful acquisitions**

GROWTH

Organic growth

Driven by ever growing utilization of digital technology

+

Bolt on acquisitions

Highly fragmented market
31 acquisitions successfully integrated

PROFITABILITY

Cost discipline despite strong growth

CASH

Underlying FCF generation c 4-5% of revenue

Organic capex needs at c 1.5% of revenue, mostly for IT platform

W/C financing through factoring

DIVIDEND

Not currently planned

DELEVERAGING

Net debt / EBITDA at 0.3x (FY 2018) (*)

M&A

Acquisitions at favourable multiples of 4-6x EBITDA

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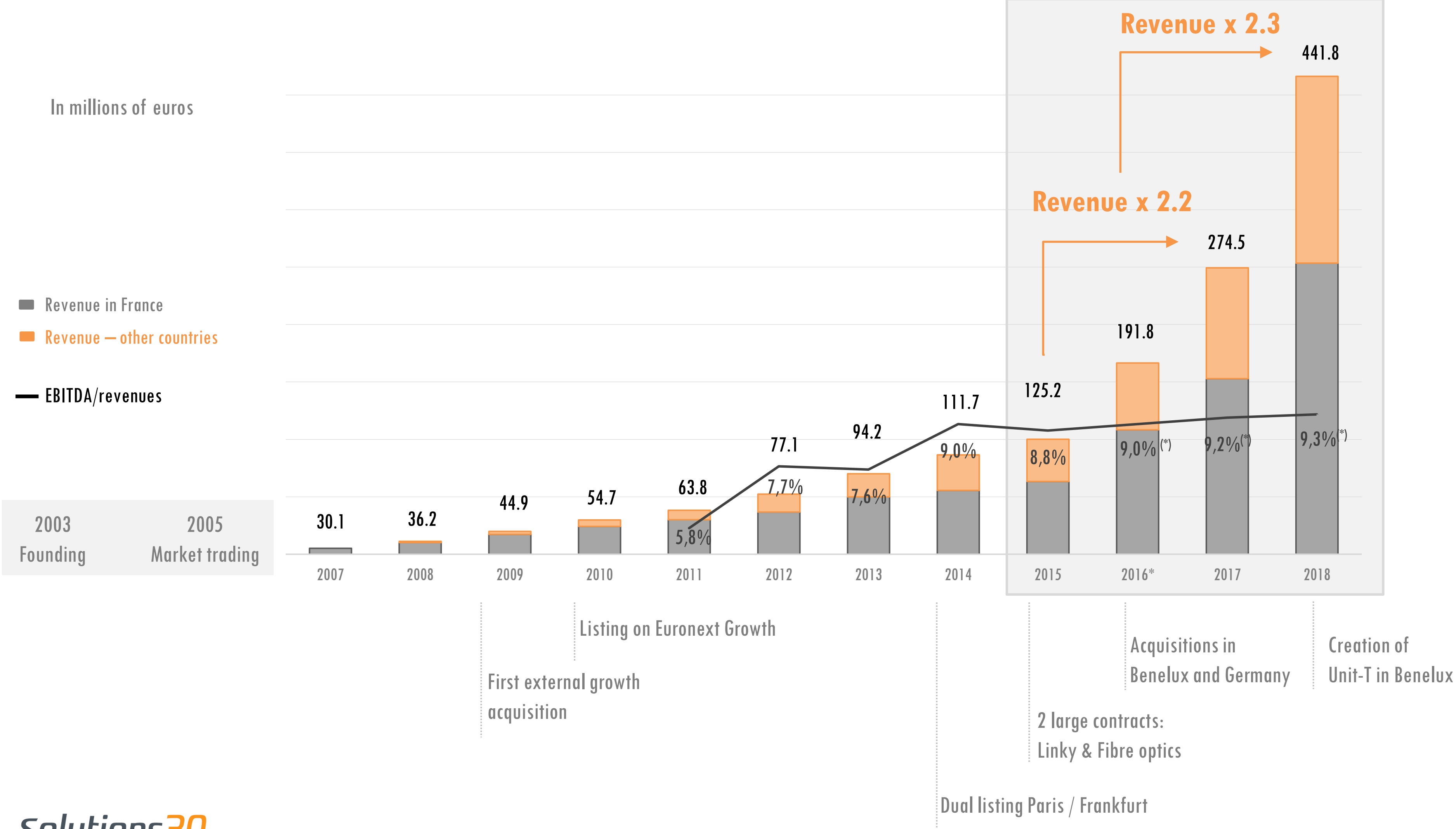
(*) Excluding Factoring of 51M€ FY2018

ROBUST GROWTH MOMENTUM

+28% **average annual growth**
2007 to 2018

In millions of euros



(*) Adjusted EBITDA

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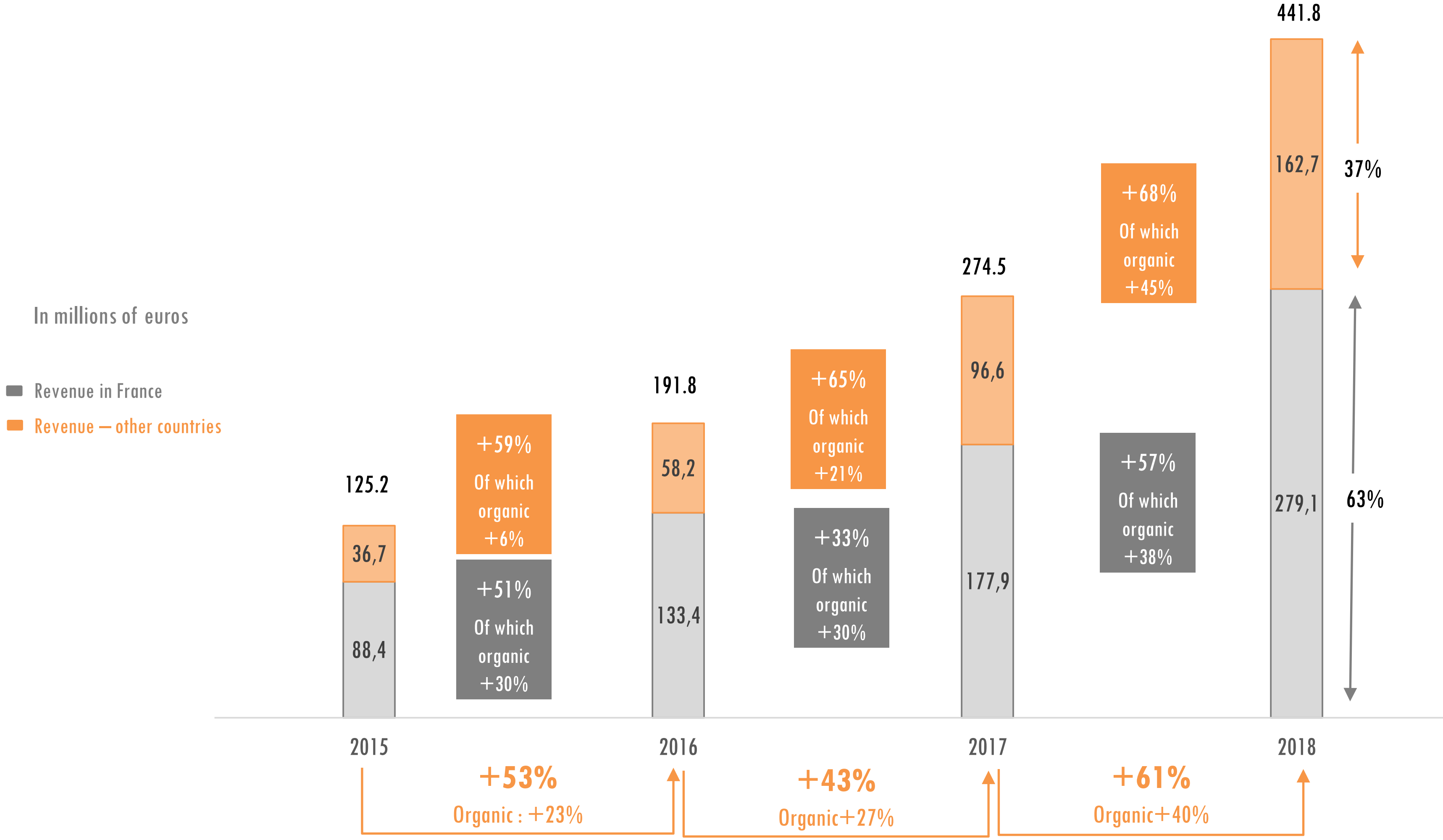
A NEW GROWTH PHASE SINCE 2015



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SELECTED CURRENT GROWTH DRIVERS

Client base
Top 5 clients <50% of revenue. Stable, utility-style client base

Diversified end-markets
Telecom, IT, Energy, Retail, Mobility, Security, Health, Home

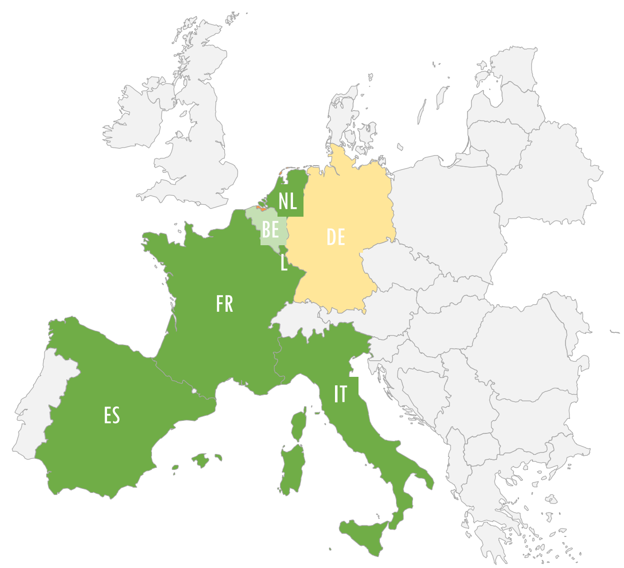
Macro trends
Digitalization, fast connections, IoT, industry 4.0, Smart City etc.

Telecoms: Focus on High Speed Internet

	FTTH/B coverage (homes passed/households)	Take up (Subscriptions/homes passed)
	98%	40-50%
	<50%	40-50%
	<10%	30-40%
	<50%	52%
	<50%	51%
	<35%	<30%
	36%	38%

Source: Idate FTTH Council Europe Sep 2018

Energy: Focus on Smart Meters



Large scale roll-out >80% planned by 2020
Roll-out <80% planned by 2020
Selective roll-out plan

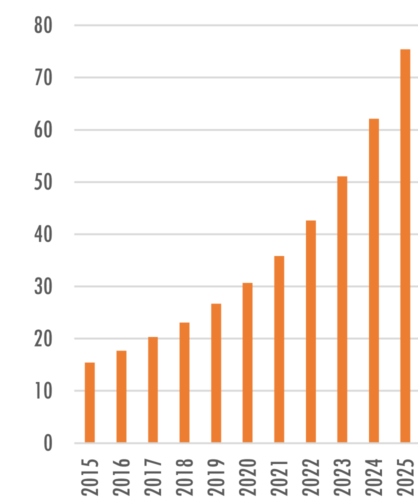
Source: European Commission, July 2019

IoT/IT

Retail

Security

Connected devices
(in billions, global)



Source: Statista

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SELECTED FUTURE GROWTH DRIVERS

Client base
Top 5 clients <50% of revenue. Stable, utility-style client base

Diversified end-markets
Telecom, IT, Energy, Retail, Mobility, Security, Health, Home

Macro trends
Digitization, fast connections, IoT, industry 2.0, Smart City etc.

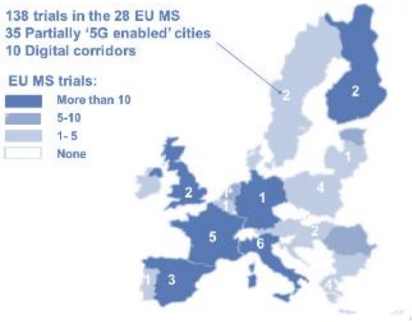
Telecoms: Focus on 5G

5G national plans

Ten member states with 5G roadmaps:

Austria	Luxembourg
Estonia	Netherlands
Finland	Spain
France	Sweden
Germany	UK

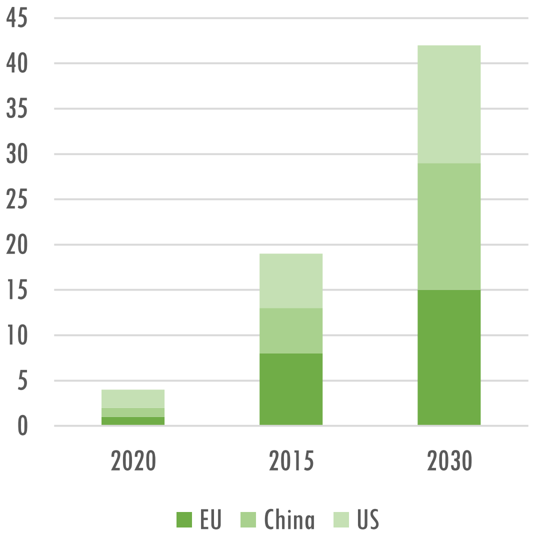
5G trials



Source: European Parliament ITRE, April 2019

Energy: Focus on EV charging

Estimated number of chargers (m):



Estimated capex (USD bn):

11
19
17

Source: McKinsey

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VALUE CREATION THROUGH CONSOLIDATION

Solutions 30 is a consolidator in a fragmented European market, with hundreds of small, independent companies. The group's size allows for significant value-accretion through bolt-on-acquisitions.

Acquisitions follow a strict set of criteria:

National reach	Targets that have regional reach and help Solutions 30 to achieve critical size
Ability to reach Group level profitability	Targets with identified improvement drivers
High-potential markets	Primarily target European markets where S30 is already present and adjacent countries
Market share and access to new clients	Targets providing access to major client contracts and/or new markets, in order to increase the geographic density of interventions and seize new growth opportunities

2018: 6 SUCCESSFUL & ACCRETIVE OPERATIONS

Italy – Outsourcing deal
March 2018

- Outsourcing of DXC Technology field services
- € 30m over 5 years

Spain – Acquisitions
October 2018

- 10 M€ revenue
- Minority stake

Benelux – Outsourcing deal
July 2018

- Outsourcing of Telenet field services in Belgium
- Joint-venture with Telenet (70% owned by SOLUTIONS 30)
- 5 to 7-year contract of € 70m per year

Benelux – Acquisition
June 2018

- Acquisition of the remaining 50% of Belgian subsidiary

France – Acquisitions
August 2018

- Increased stake to 76%
- €53 m revenues in 2017
- Increased presence at Orange and Enedis

December 2018

- Acquisition of 100% of Sotranasa
- €49m revenues in 2017
- 25% of revenues in Energy sector

M&A REVIEW

Acquisition history: Approximate revenues at the time of acquisition (ex earn-out, deferred items etc).

Year	Target	Country	Sector	FY revenues (EURm)
Acquisitions				
2009	Smartfix	Netherlands	IT + Telecoms	3
2009	Anovo-on-site	France	IT	4
2009	Desktop activities of Sogeti	France	IT	11
2011	MPS	France	IT	5
2011	Odyssée	France	IT + payment terminals	5
2011	Agemis	France	IT	3
2013	Form@Home	France	IT + IoT	4
2013	CIS Infoservices	France	IT + Telecoms + payment terminals	20
2013	Mixnet	Italy	IT	5
2013	B&F	Germany	IT + Telecoms	4
2014	Connecting Cable	Germany	IT + Telecoms	5
2015	Rexion	Spain	IT	5
2016	Autronic	Spain	IT + Telecoms	12
2016	JFS	Belgium	IT + Telecoms	20
2017	ABM	Germany	Telecoms	12
2018	CPCP	France	Telecoms	53
2018	Saltò	Spain	Telecoms	10
2018	Sotranasa	France	Telecoms + Utilities	49
2019E	Magaez	Spain	Telecoms	2
Total (approximate)				232
Outsourcing deals				
2017	VKDFS	Germany	Telecoms	23
2017	Fujitsu FS	France	IT	10
2018	DXC	Italy	IT	5
2018	Telenet (JFS+outsourcing)	Belgium	Telecoms	estimated c 70
Total (approximate)				108

OBJECTIVES | TOWARDS €1 BILLION TURNOVER

To be the European leader in solutions for the use of new digital technologies and in the deployment of connected objects

#3 External growth, additional accelerator

#2 Duplicating the model in other countries

#1 Growth of activity in France

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BALANCE SHEET

WORKING CAPITAL

1

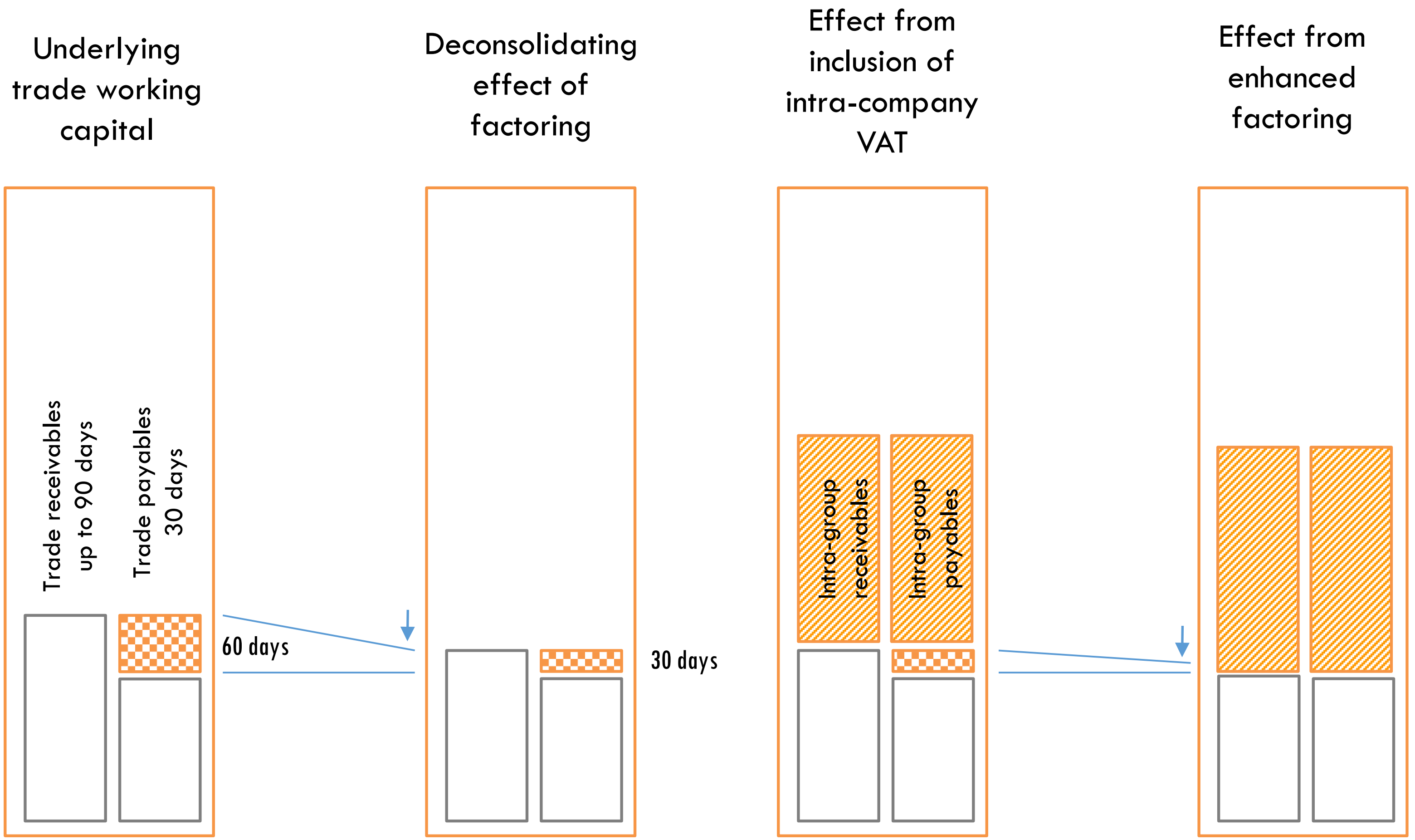
- Asset-light business model, but with a trade working capital financing need of underlying c 15-20% of revenue.
- Factoring of receivables is used as a financing choice. It provides very favourable terms (1% annual amount) from two large French banks.
- Solutions 30 client base consists largely of established blue-chip companies with high credit ratings.

2

- Working capital calculation includes significant other short term receivables and short term tax debts.
- These consist for the larger part of intra-group VAT assets and liabilities. These arise where client relationships are at group level, while the operating entity is a local subsidiary.

	M€	2018 normalized post factoring	receivables and debts from outsourcing deals	debts related to earn out	integration of receivables sold to the factor (deconsolidating factoring)	2018 (balance sheet)	2017	2016
	Stocks	14,6				14,6	5,9	5,8
	Deposit paid	1,1				1,1	1,4	0,1
1	Receivables from sales and services provided (A)	174,3			1 51,0	123,3	103,4	46,7
2	Other receivables	148,2	- 13,5			161,8	112,0	36,4
	Differed tax assets	3,6				3,6	2,1	1,8
	Accrual accounts	1,1				1,1	1,8	1,3
1	Amounts owed for purchases and the provision of services (B)	- 73,3				- 73,3	- 35,3	- 21,7
	Deposits received on orders	- 1,5				- 1,5	- 0,1	- 0,3
2	Tax debts	- 153,9				- 153,9	- 89,7	- 34,3
	Social Security debts	- 42,6				- 42,6	- 21,6	- 14,3
	other debts < 1 year	- 16,5	28,4	18,5		- 63,5	- 27,6	- 0,8
	accrual accounts	- 2,5				- 2,5	- 3,6	- 0,7
	Reclassification B/S	-				-	- 0,2	0,4
	working capital	**52,5**				**- 31,9**	**48,4**	**20,4**
	Revenue	441,8				441,8	274,5	191,8
	Working capital / Revenue	12%				-7%	18%	11%
	(Receivables from sales A - trade payables B) / revenue	23%				11%	25%	13%

WORKING CAPITAL – SCHEMATIC OVERVIEW



Net working capital requirement. Schematic overview for illustrative purposes, not to scale.
Net working capital (difference between receivables and payables) c 60 days of revenue.

CAPITAL ALLOCATION AND CAPEX

Normalised Cash Flow model

Current Adj. EBITDA: c 9%/revenue	Steady state (ex M&A) Adj. EBITDA: >10%/revenue
Cash taxes: c 1%/revenue	Cash taxes: c 1%/revenue
Finance cost: c 0.5%/revenue	Finance cost: c 0.5%/revenue
Other cash cost**: c 1%/revenue	
CFFO before W/C	**CFFO before W/C**
Working Capital*** c 1.5%/revenue	Working Capital*** c 1.5%/revenue
CFFO after W/C	**CFFO after W/C**
Capex c 1.5%/revenue	Capex c 1.5%/revenue
FCF available **c 4-5%/revenue**	**FCF available** **> 6%/revenue**
M&A	

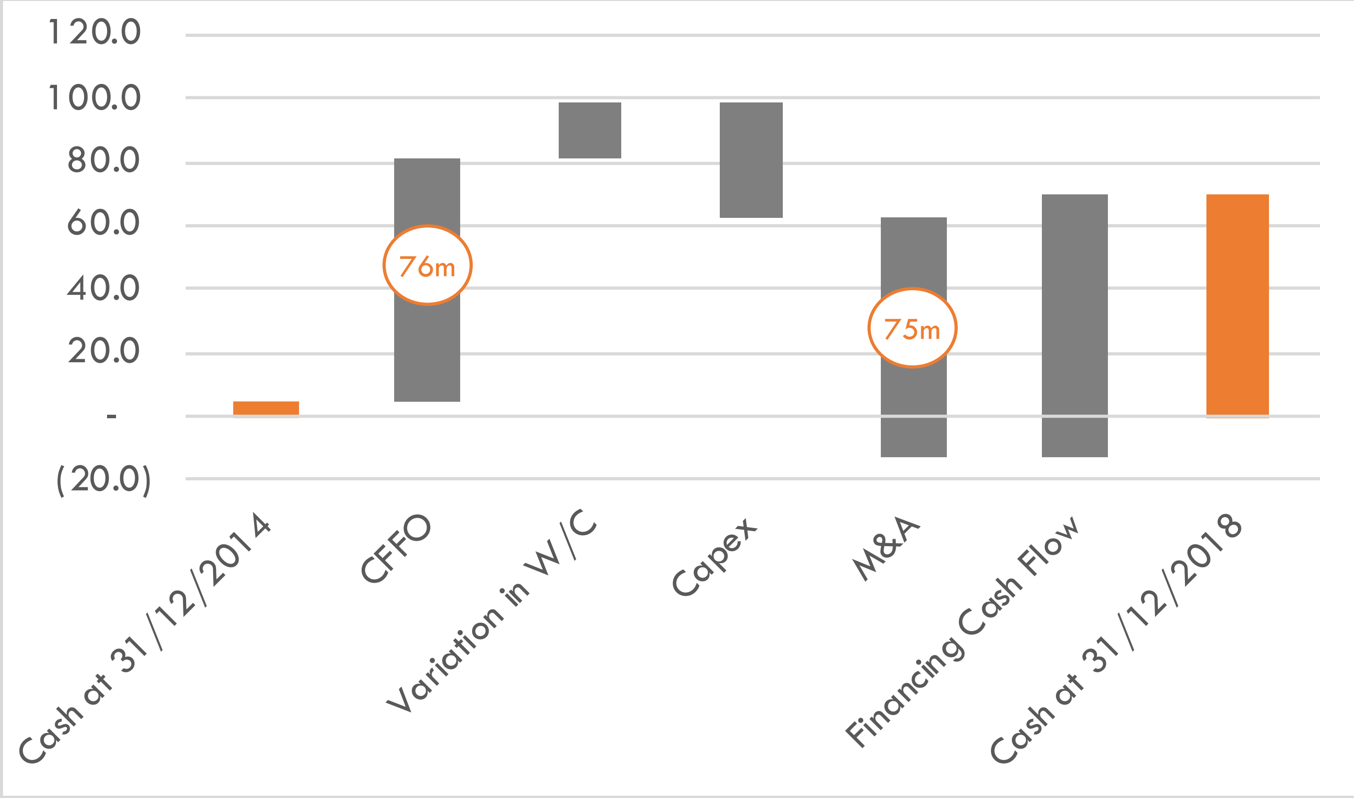
- Other cash cost: Restructuring costs are non-recurring, e.g. mostly related to acquisitions.
- Working Capital investment in any year is dependent on the amount of receivables sold to the factor.
- Capital expenditure is significantly geared towards investment into the proprietary IT platform.
- Free Cash Flow is used for value-accretive acquisitions.

* Normalised Cash Flow model based on c 25% revenue growth rate. For illustrative purposes.
** Other cash cost mostly restructuring cost (e.g. non-recurring if no M&A)
*** Working Capital requirement illustrated at 25% revenue growth

CASH FLOW – CUMULATIVE 5 YEAR BRIDGE

Operating cash flow finances cash needs including part of M&A

Short term liquidity (e.g. for M&A) provided through bank facilities



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PRELIMINARY VIEW OF IFRS IMPACT

Solutions 30 will adopt IFRS accounting standards with its full year 2019 results. The below is a non-exhaustive, preliminary view on selected expected major changes to the group's P&L, subject to change.

Goodwill / Badwill	No goodwill amortization under IFRS (EUR 3.3m in 2018).
Operating leases	IFRS 16 introduction means operating leases recognized on balance sheet and depreciated in P&L. Impact of car leases estimated at c EUR 40m on balance sheet. Neutral on net income, but changes in P&L (lower opex, higher depreciation).
Revenue recognition	Impact limited to the leasing of Payment terminals (< c EUR 3m). As a lessor, Solutions 30 must recognize one off the part of the rent related to the leasing of the equipment.
Stock options	Stock options are booked as an expense and valuated at fair value at the grant date.

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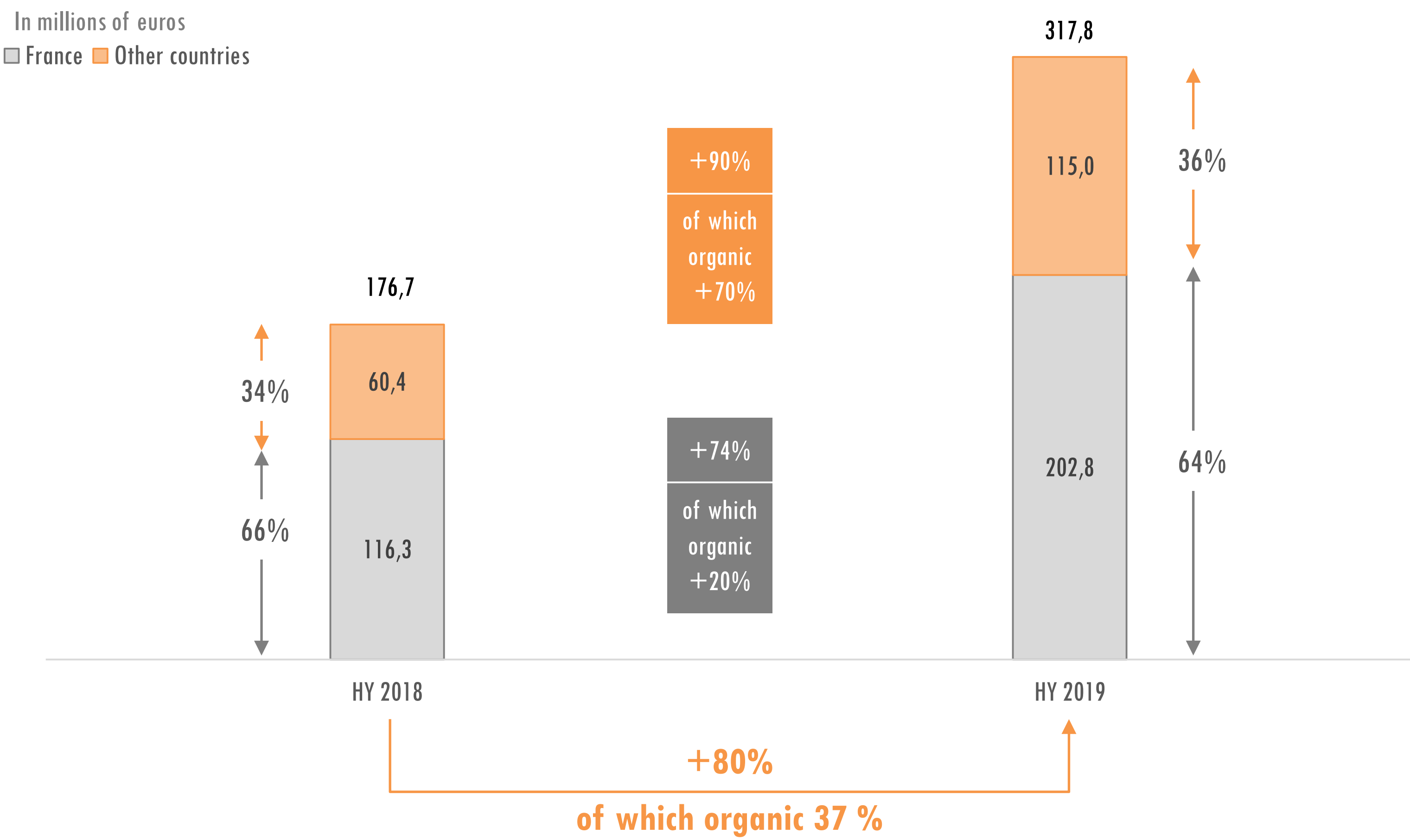
HY2019 REVENUE

Strong growth momentum

CONTINUED GROWTH MOMENTUM IN 2019



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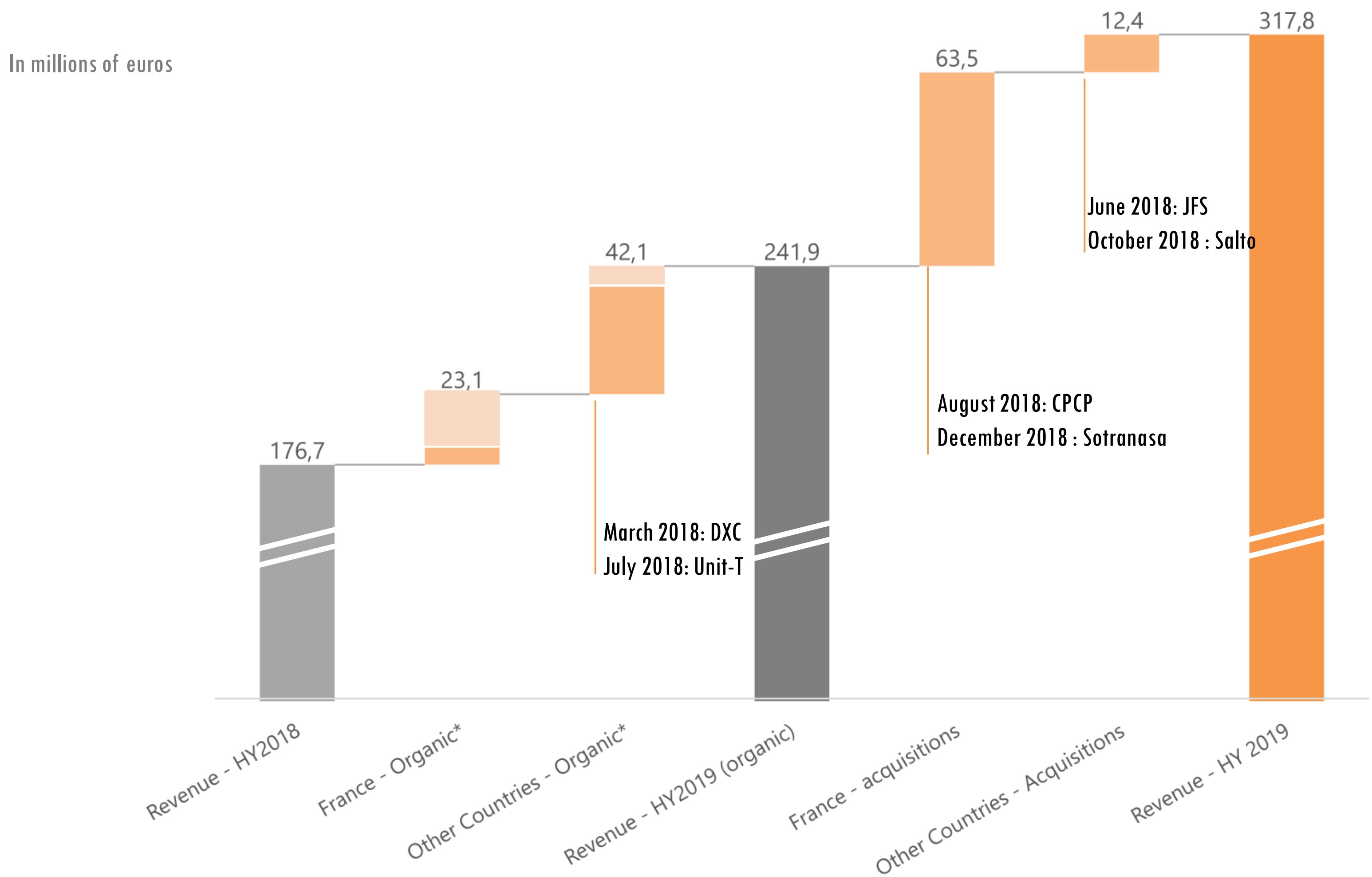
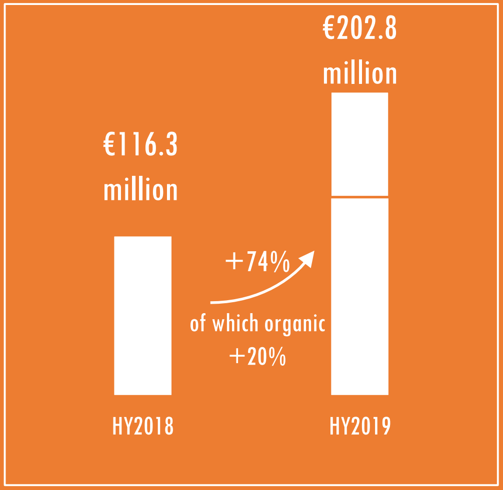
HY2019 REVENUE: +80% (+37% ORGANIC)

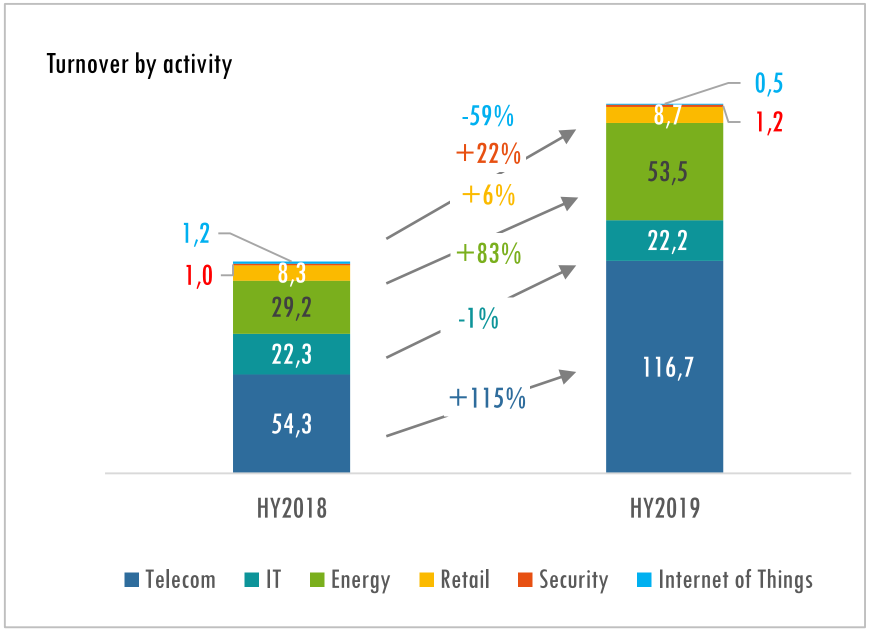


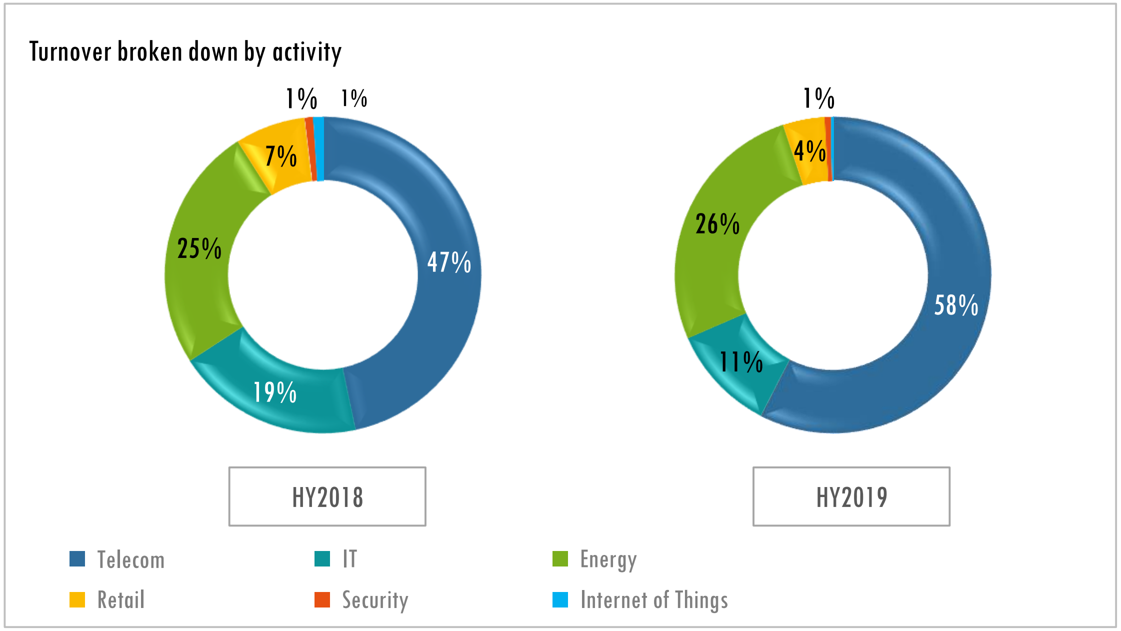
* Organic growth operated by acquired companies

FRANCE
HY 2019



In millions of euros





FRANCE GROWTH MAINLY DRIVEN BY OPTICAL FIBRE AND SMART METER INSTALLATION

TELECOM

A fibre market driven by the roll-out of ultra high speed internet

Ultra high-speed Fibre plan

Full territorial coverage by 2022: 20m households

Mar-2019: 14.5m homes eligible for FTTH, 5.3m subscribers

6,000 customers connected per day

Consolidated very strong positions with the 3 main operators

Startup of new activities promoted by local municipalities (« RIP » / public Network)

ENERGY

Linky / Enedis : **19m meters are installed**
+15m meters by 2022 (probably 5m beyond 2022)

Opportunities for deployment of smart grid solutions for ENEDIS and EDF

Gazpar / GRDF : **3m meters are installed**
+8m meters by 2023

Charging stations

Selected as preferred supplier to deploy the EDF "electric mobility plan" throughout Europe, as EDF plans to become the European leader in smart charging.

Established partnership with Alfen for the deployment of charging stations - many tender offers on going

RETAIL

Ongoing deployment of cash registers and credit card readers in 6,000 hospitality venues (bars)

Won new contract for the assistance of 7,000 retail points of Banque Populaire d'Aquitaine

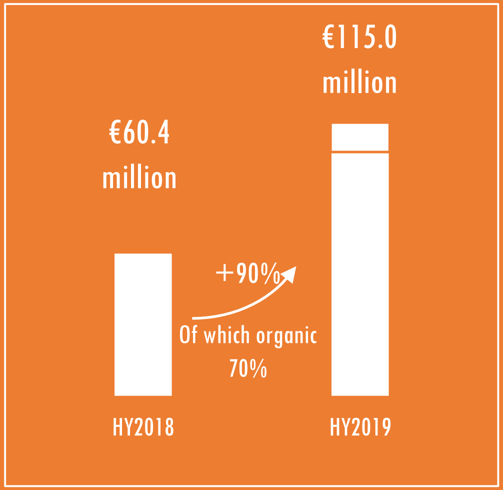
Many tender offers ongoing

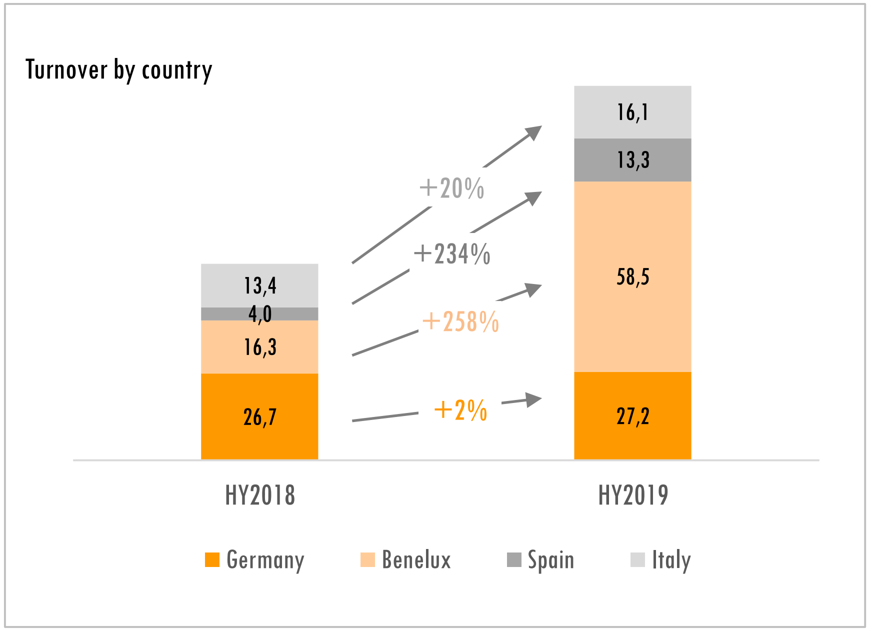
IT

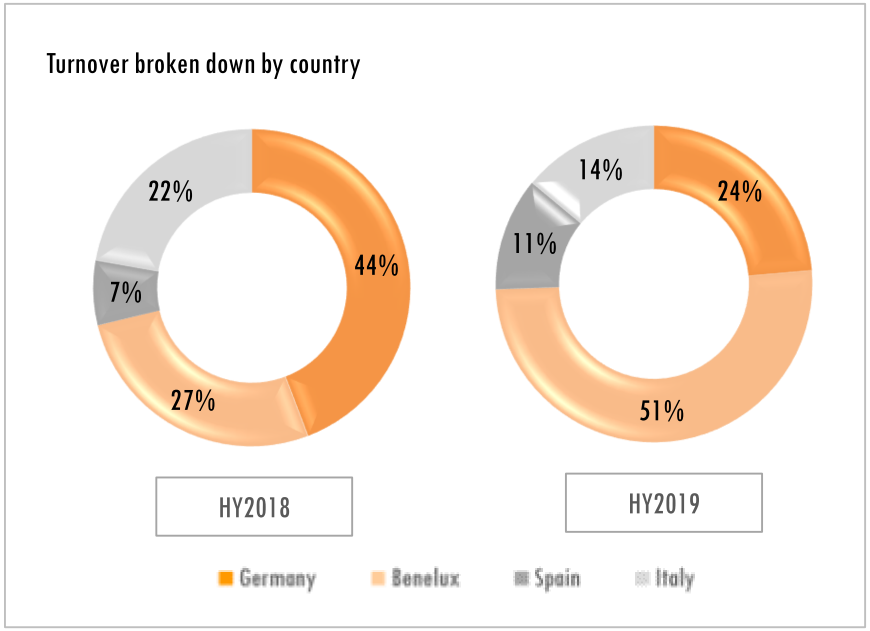
Ongoing negotiations for pan-European contract with OKI and Xerox printers

Many tender offers ongoing

OTHER COUNTRIES HY 2019







In millions of euros

OTHER COUNTRIES IT & TELECOMS DUPLICATION OF BUSINESS MODEL

Benelux

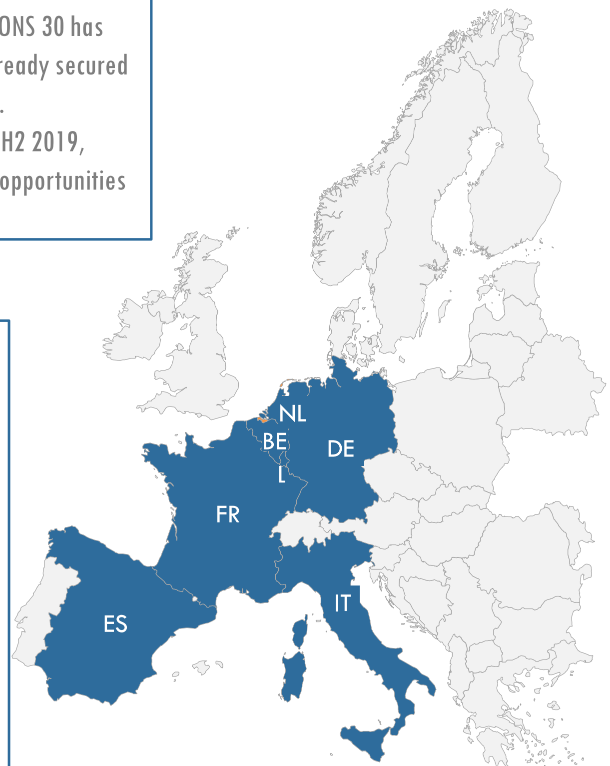
Consolidate dominant position in Belgium. Increase investment in The Netherlands

- Trough the outsourcing contract of Telenet, SOLUTIONS 30 has become the dominant player of Belgium having already secured a strong position on the FTTH projects of Proximus.
- The Netherlands will re-start FTTH deployments in H2 2019, SOLUTIONS30 will focus there to deploy its model, opportunities for external growth in the pipe

Spain

Back to growth

- Trough the acquisitions of SALTO and Magaez, SOLUTIONS 30 has gained access to Masmovil and increased its activities with Vodafone
- Even though penetration rate of FTTH is high (about 40%), the market still offers significant growth potential
- SOLUTIONS 30 has recently won a contract with DIGI, a fast growing Spanish operator, for FTTH deployment
- Began working with Telefonica on IoT
- Signed contract with Cisco
- Acquisition of Provisiona : strategic move to position S30 in the 5G market



Germany

Partner of the 3 main operators

Highly fragmented market

Continued investment expected

- Increasing volumes with Deutsche Telekom, Vodafone and Unitymedia
- Vodafone will invest 4b€ over 3 years beginning in mid-2020
- Work to broaden the offer and the customer base
- Opportunities for external growth in the pipe

Italy

Successful milestones underway

Growth in a high-potential market

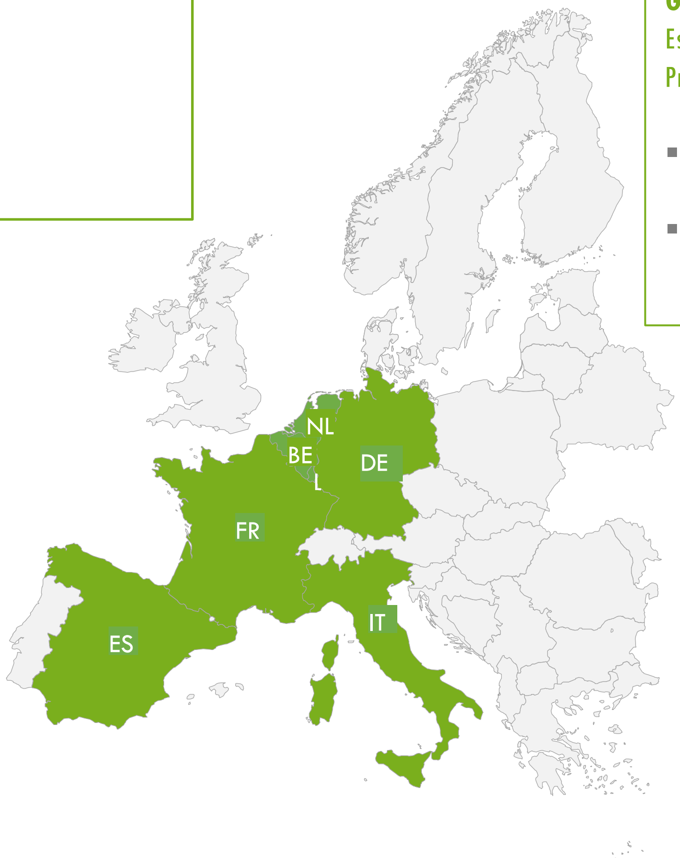
- New CEO of TIM is reorganizing the company, possible merger with Enel Open Fiber. Back to investments around year end.
- Opportunities for external growth in the pipe

OTHER COUNTRIES ENERGY & SMART GRID PREPARING TO CAPTURE GROWTH

Benelux
Opportunity for market opening
- Roll-out of smart meters beginning slowly
- Ongoing activities for several utilities
- Ongoing deployment of charging stations

Germany
Established player
Prepared to seize opportunities

- Won pilot contract for installation of 44,000 meters in 3 states: Schleswig-Holstein, Brandenburg and Bavaria
- Ongoing discussions with E.ON for large-scale smart meters deployment



Spain
Begun activities in the energy market

- Ongoing tender offers for the deployment of charging stations

Italy
Business progressing

- Local utilities continue to allocate "as and when"
- Energy business accounted for approximately 7.5% of revenue for the subsidiary in 2017 and approximately 17% in 2018.
- Won first contract with ENEL for the maintenance of smart-charging stations

HY 2019: STRONG CASH GENERATION

CASH	DEBT	NET CASH
€ 94.8M	€ 77.3M	€ 17.5M
+€ 24.9 M vs FY 2018	- € 5M vs FY 2018	+ € 29.9 M vs FY 2018

10 M€ received from 2018 outsourcing operations

Amount of receivables sold to the factor : € 46 M (- €5 M vs FY 2018)

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TRANSFER TO EURONEXT

Action plan follow-up

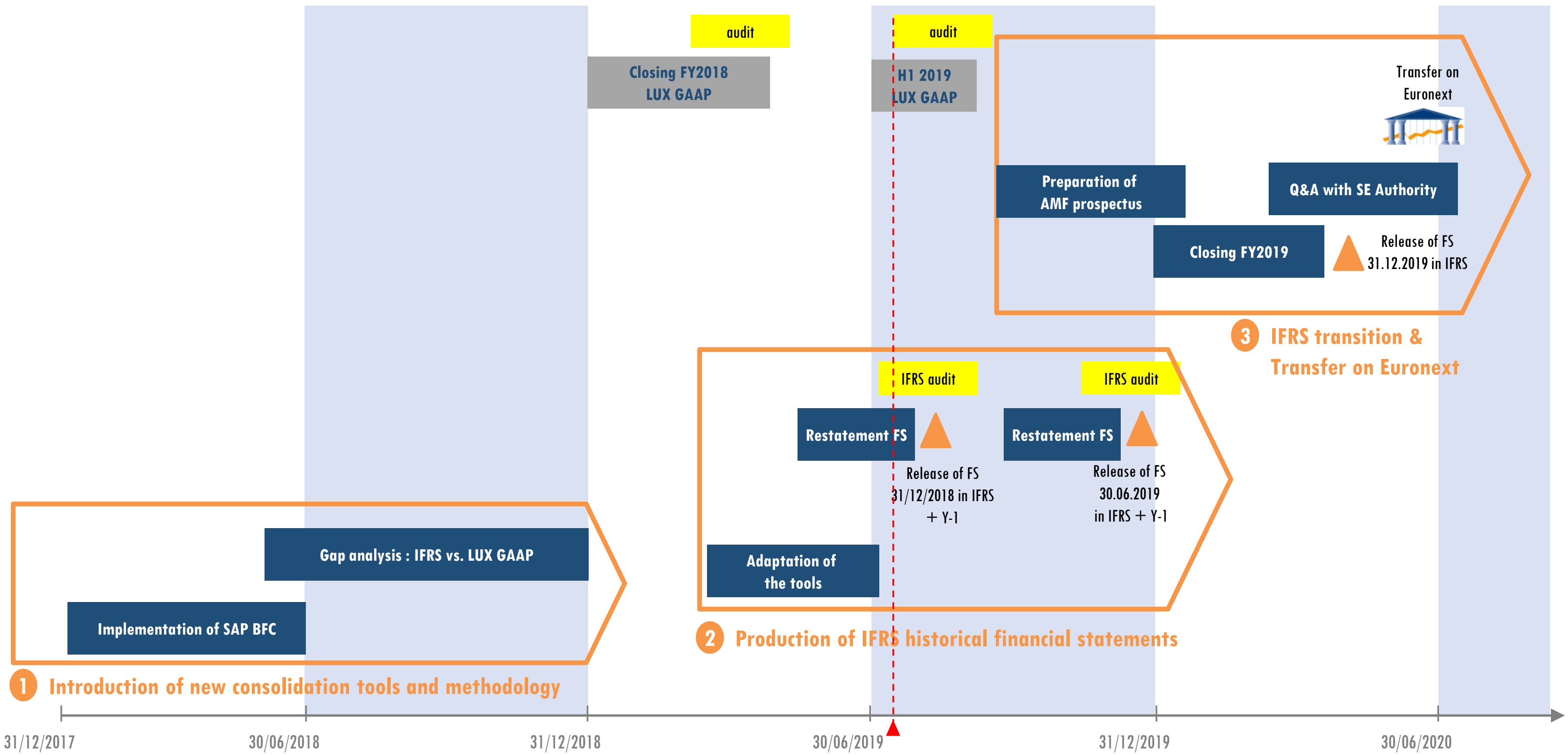
GOVERNANCE INITIATIVES 2019

- A number of corporate governance and disclosure initiatives, and will continue to invest resources in this area.
- Preparation for a move to the General Standard of Euronext in 2020.

Ecovadis rating	Awarded 'Silver' in June 2019
Publication of Corporate Governance Update	On the website. Contains information on governance and remuneration.
Supervisory board committees	Nomination and Remuneration committee, Audit committee and Strategy committee established
New LTIP in planning	The company is working on a proposal for a new LTIP to align long-term incentives with shareholder interests.

REPORTING FY 2019 FINANCIALS UNDER IFRS

The schedule of the IFRS transition has been defined in order to prepare the move to Euronext in 2020



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APPENDIX

FY 2018: SOLID GROWTH IN OPERATING RESULTS

€ millions	2018	2017	Change
Turnover	441.8	274.5	61%
Operational costs	350.3	217.7	61%
As % of turnover	*79.3%*	*79.3%*	
Central org. costs	50.4	31.5	60%
As % of turnover	*11.4%*	*11.5%*	
Adjusted EBITDA[(1)]	41.1	25.3	62%
As % of turnover	*9.3%*	*9.2%*	
Operational depreciation	-7.9	-4.7	68%
As % of turnover	*-1.8%*	*-1.7%*	
Adjusted EBIT[(1)]	33.2	20.6	61%
As % of turnover	*7.5%*	*7.5%*	*61%*

[(1)] Correction of elements considered by the company as being exceptional or non-recurring to provide a better reading of operational performance

EBITDA: operating profits before depreciation net of reversals, amortization and provisions

EBIT: operating profits from recurring operations before amortization of intangible assets, including goodwill

FY 2018: STRONG IMPROVEMENT OF NET INCOME

€ millions	2018	2017	Change
Adjusted EBIT	33.2	20.6	61%
Amortisation of intangibles	-4.8	-3.9	22%
Financial result	-1.7	-1.6	6%
Non-recurring items[(2)]	2.5	0.7	258%
Corporate taxes	-5.6	-1.7	227%
Net income of integrated companies	23.7	14.1	68%
As % of turnover	*5.4%*	*5.1%*	
Goodwill amortisation	-3.3	-1.7	95%
Consolidated net income	20.4	12.4	65%
As % of turnover	*4.6%*	*4.5%*	
Adjusted net income (group share)[(3)]	28.5	18.0	58%
As % of turnover	*6.4%*	*6.6%*	
Net income (group share)	20.0	12.5	60%
As % of turnover	*4.5%*	*4.6%*	

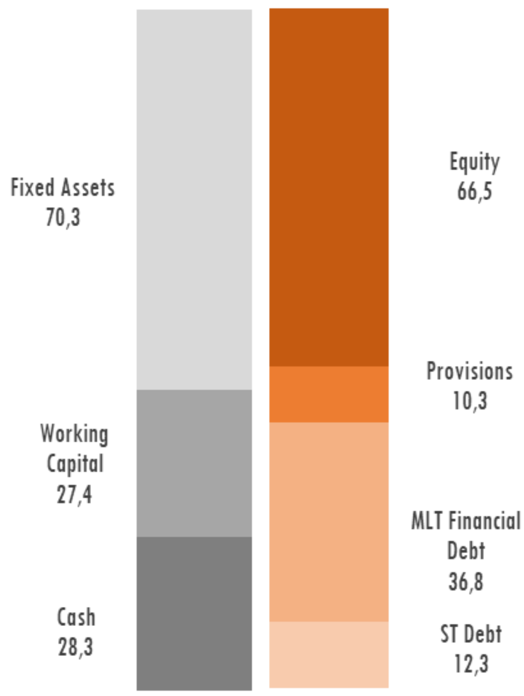
[(2)] Non-recurring items: this item mainly includes the net amount of restructuring costs and negative goodwill (badwill)

[(3)] Net Income Group Share before amortisation of goodwill and intangibles

FY 2018: SOLID FINANCIAL STRUCTURE

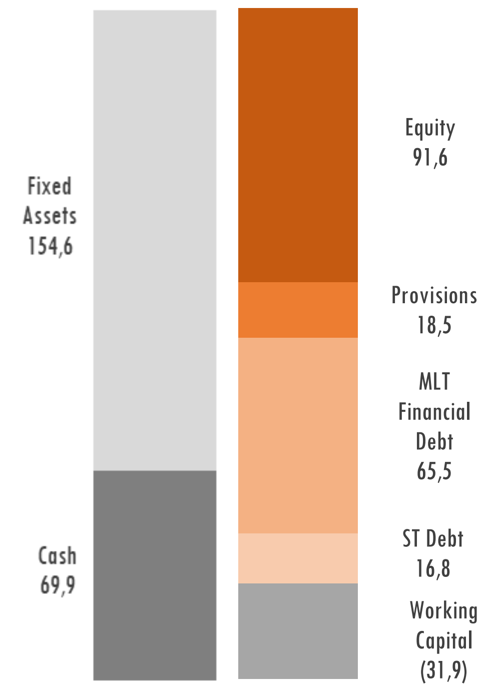
In millions of euros

At 31 December 2017



Total assets: €125.9 million

At 31 December 2018



Total assets: €224.3 million

Net financial debt	€12.4 million
Net debt / Ebitda	30%
Amount of receivables sold to the factor	€51 million
Interest Coverage Ratio (net EBIT/FE)	x19.6

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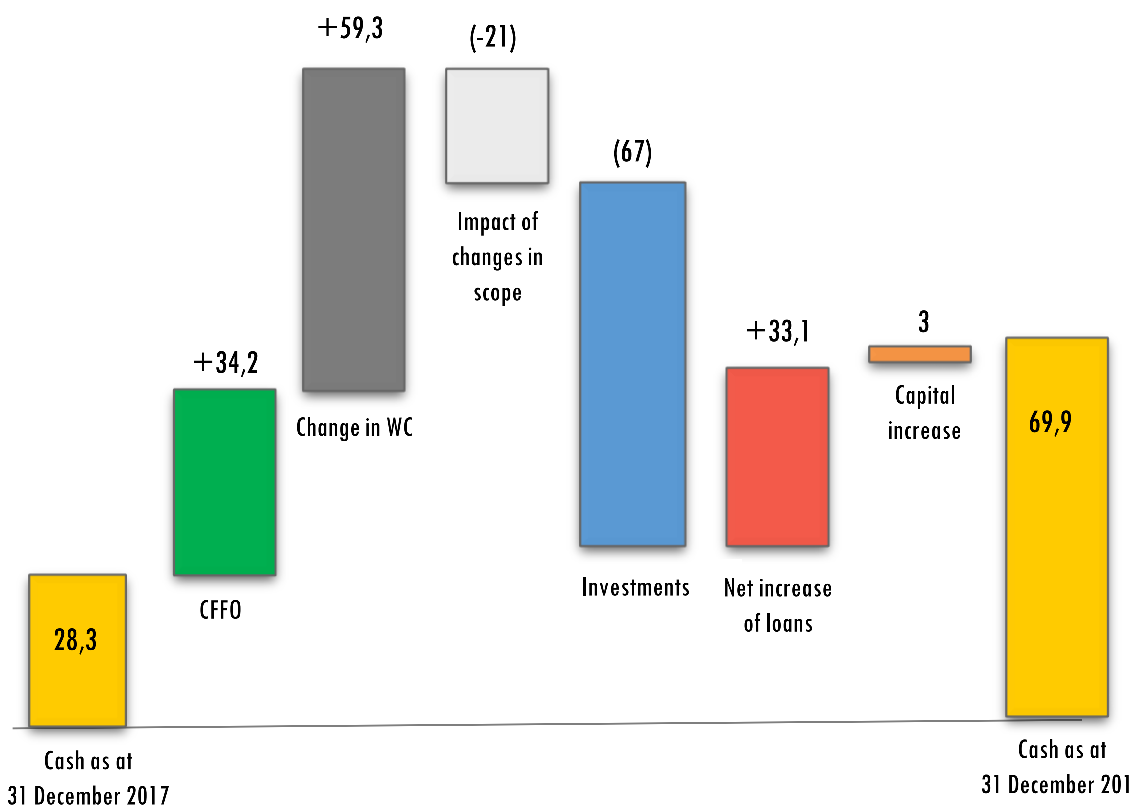
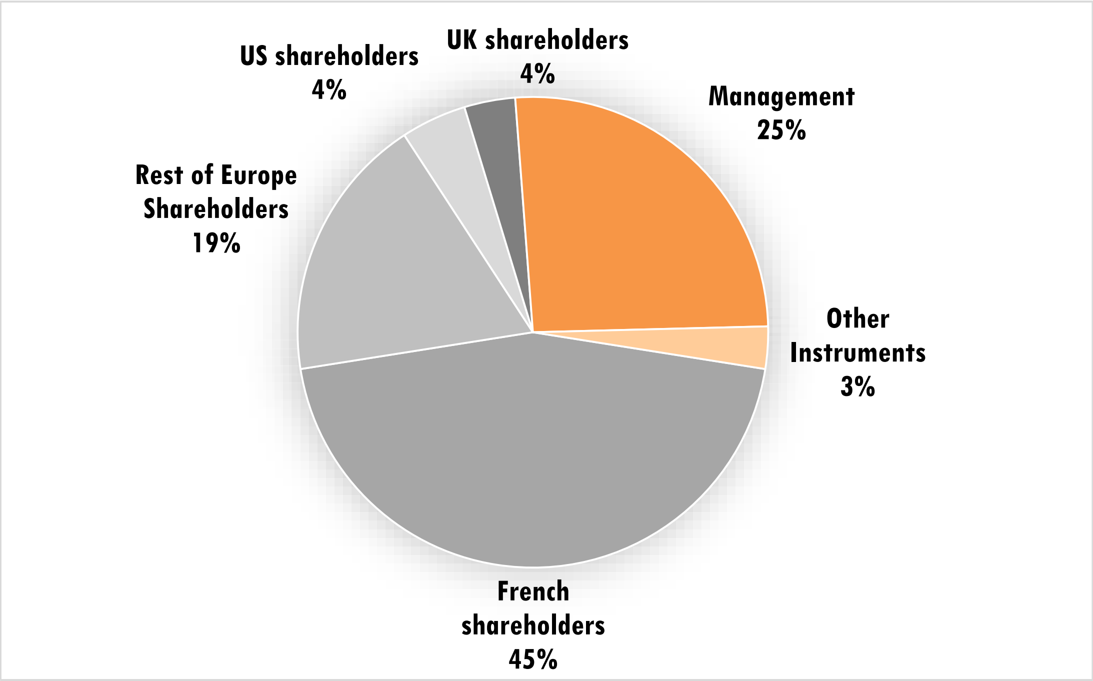
FY 2018: CASH GENERATION



In € millions

SHAREHOLDER STRUCTURE



Total number of shares	104,057,392
Total number of shares to be issued (from financial instruments)	3,070,592

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CALENDAR

23 September 2019	2019 H1 Financials
24 September 2019	14:30 CET investors webcast
4 November 2019	2019 Q3 revenues
5 November 2019	14:30 CET investors webcast

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