ATALIAN H1 2024 RESULTS

August 29, 2024

ATALIAN
GLOBAL SERVICES

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Percentage figures which support comparisons with earlier periods refer to the prior year or to the corresponding quarter in the prior year unless otherwise stated.

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H1 2024 at a glance

H1 2024 key takeaways

A new Ultimate Beneficial Owner (“UBO”)
- ✓ Sophie Pécriaux is since June 2024, the new UBO of Atalian
- ✓ Franck Julien has no longer any shareholding or management interest in Atalian

Good recovery in Q2 of CFFO driven by tightening of working capital management (WCR)
- ✓ Cash management improvement: positive CFFO in Q2, significant improvement in WCR management over Q2, action plans in place to further improve WCR management

Satisfactory achievements out of France
- ✓ CEE: strong performance, notably in Türkiye and Czech Republic
- ✓ Benelux: satisfying track record

Challenging environment for French cleaning business
- ✓ Commercial and operational efforts to foster organic growth are active
- ✓ Some negative impacts on contract retention likely to be related to concerns on pre-refinancing Atalian’s balance sheet in Q1, and/or by media coverage on historical shareholder trial which took place in H1 (the “Legacy Issues”)
- ✓ Higher payroll taxes along with French cleaning wages increase as a result from collective bargaining, leading to only partial passthrough of 2024 cost inflation to customers
- ✓ Despite this challenging environment new contracts win remain strong, while still a negative trade balance at this stage
- ✓ Productivity actions continue

Priority given to organic growth with action plans in place since Q1 to secure this growth:
- ✓ Atalian will pursue its disciplined cost-containment program and step up its sales efforts on both the offensive and defensive fronts through a more sector-based approach to customers, in order to return to stronger net organic growth

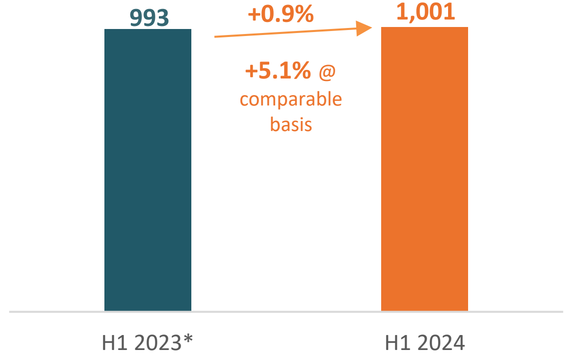
Refinancing achieved on March 28, 2024, with the issue of new June 2028 €836m euro notes, 3.5% cash, 5% PIK

Legacy Issues and difficulties to passthrough the full impact of French cleaning staff cost increase, combined with current uncertain French political environment, lead Atalian to revise downwards its EBITDA and CFFO targets for 2024, while 2025 expectations are being re-assed

H1 2024 results at a glance

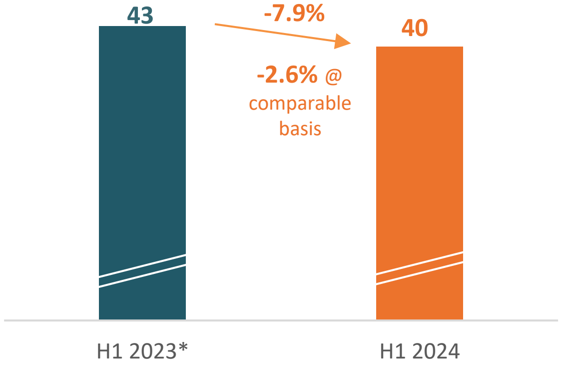
Net sales

In € million



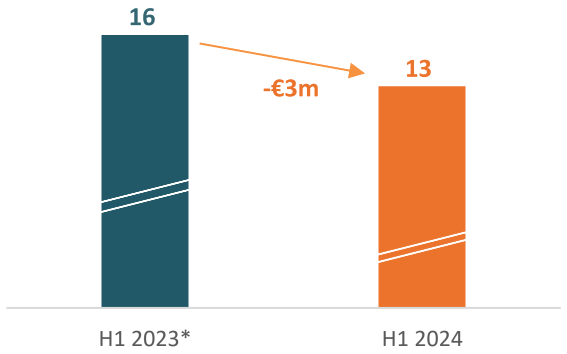
Recurring EBITDA

In € million



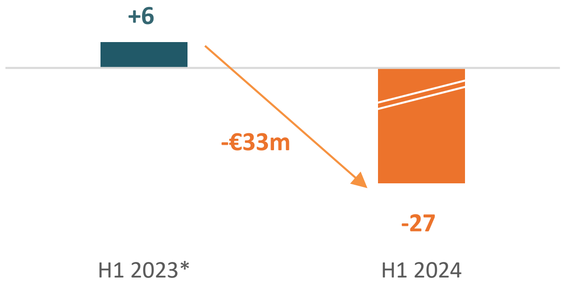
Recurring EBIT (excl. non-recurring items)

In € million



CFFO, excl. non-recurring items

In € million



Slight sales increase year-on-year:

- Good improvement of iFM and International operations
- French trade balance shows resilience but is still impacted by an uncertain challenging environment and difficult indexation for French cleaning operations
- Unfavourable exchange rate in Türkiye limiting the positive impact of a very strong organic growth

H1 2024 EBITDA decline vs H1 2023 but improved vs. Q1 2024. Positive contribution of productivity combined with the positive CEE trade balance and lower holding costs were more than offset by insufficient passthrough of the 2024 costs increases in cleaning business in France, along with the negative trade balance in France

Negative CFFO

- Still negative change WCR of -€37m mainly due to late invoicing, despite significant improvement over the second quarter
- Non-recurring items of €23m in H1 2024, due to the refinancing
- Q2 2024 CFFO excluding non-recurring items improved by €21m to +€35m, thanks to significant improvement in working capital management over the second quarter

** US assets sold in 2023 are meeting the IFRS 5 criteria and reclassified as discontinued activities.*

Focus France & iFM

€ million	Q2 2024	Q2 2023	change YoY	H1 2024	H1 2023	change YoY
Revenue	**357**	**354**	**0.9%**	**717**	**715**	**0.2%**
Recurring EBITDA*	**17.8**	**26.2**	**-32.0%**	**33.3**	**42.2**	**-21.0%**
Recurring EBITDA Margin (%)	*5.0%*	*7.4%*	*-242 bps*	*4.7%*	*5.9%*	*-125 bps*

- **YoY revenue up 0.2%**
  - Growth in iFM operations, notably in Q1
  - Offset by insufficient contribution of indexation, along with negative trade balance. Despite several commercial actions in place and wins of new contracts, the trade balance is impacted by the loss of some contracts since the beginning of the year and notably in Q2 combined with the impact of the loss of a major contract in 2023, notably in Security and Safety business
- **YoY EBITDA decline of 21.0%**
  - Insufficient indexation in the cleaning business that could not be offset by productivity efforts
  - Despite actions plans implemented as from Q1, profitability continues to be impacted by additional social charges increasing staff cost and difficulties to fully passthrough these increases to our customers:
    - French cleaning staff cost have increased by c.€16m EBITDA in H1 2024 (incl. €10m of higher payroll taxes) including the 2.5% increase in January 2024 as part of the collective bargaining cleaning agreement
    - As a result, general INSEE inflation passthrough is being achieved but staff cost increase over and above it proves more difficult to be transferred

** After re-allocation of dedicated holding costs*

Zoom on indexation for Atalian's cleaning in France since January 2024

French cleaning wages increase as a result from collective bargaining of the French Federation of Cleaning Companies (FEP)	Jan. , 2024	Increase of 2.5%
	July 2024	Increase of 0.7%
French minimum wage increase (SMIC) of 1.13% increasing the gap between FEP minimum wage and French minimum wage and therefore limiting impact of reduced payroll tax rate on low wages ("Fillon benefit")	Jan. 2024	Impact of an estimated 2% on staff cost for employees at FEP minimum
Reduction of deduction on wages to calculate payroll tax (DFS)	Jan. 2024	Decrease from 6% to 5%
Increase of French mandatory pensions contribution	Jan. 2024	Increase from 1.9% to 2.02%
Increase of the French state mandatory employment insurance (AGS)	Jan. 2024	From 0.20% to 0.25%
Increase in the French Social Security ceiling	Jan. 2024	To 3864 - impact on health care costs
Transport contribution in the Paris area (Ile de France)	Jan. 2024	Increase from 2.95% to 3.20%

French cleaning staff cost have increased by €16m in H1 2024 vs. H1 2023

-€16m cumulated impact on EBITDA in H1 2024 vs. H1 2023 results from the combined effect of:

- French cleaning wages increase as a result from collective bargaining of the FEP, despite lower FTE (c.€6m)
- Higher payroll taxes (c. €10m), mainly resulted from circumstantial exogeneous impacts (incl. the decrease of the employer's contribution rebate ("Fillon Benefit"))

⇒**Difficulty to passthrough the full impact of this staff cost increase to the customers (only c. 50% as of end of June, or circa the level of the French general price index (INSEE index))**

Focus International (CEE + Benelux)

€ million	**Q2 2024**	Q2 2023	change	change @ comparable basis	**H1 2024**	H1 2023	change	change @ comparable basis
Revenue	**146**	**140**	**4.1%**	**20.5%**	**288**	**279**	**3.1%**	**18.0%**
Recurring EBITDA*	**7.9**	**6.6**	**20.9%**	**40.4%**	**14.1**	**12.6**	**11.8%**	**30.2%**
Recurring EBITDA Margin (%)	*5.4%*	*4.7%*	*75 bps*	*0 bps*	*4.9%*	*4.5%*	*38 bps*	*47 bps*

- **YoY revenue up 3.1%, impacted by negative forex impacts and hyperinflation in Türkiye. On a comparable basis, revenue is up 18.0%**
  - Significant growth in the CEE benefiting from actions taken in 2023 to re-boost organic growth and successful passthrough inflation to clients in all geographies
    - Higher sales in Türkiye, driven by positive commercial dynamics in an environment of hyperinflation, and the volume recovery of Czech Republic
  - Marginally offset by negative trade balance in Benelux, which has been impacted by the loss of low or negative margin contracts over the past twelve months
- **Strong comparable basis of EBITDA growth of 11.8% (+30.2% at current rate)**
  - Significant improvement, which gathered pace in Q2 2024, mainly reflecting EBITDA growth in all geographies driven by:
    - improved trade balance
    - successful indexation
    - positive contribution of continuous improvement measures
    - positive impact of the higher level of special works in Q1

** After re-allocation of dedicated holding costs.*
Comparable basis excludes forex impacts

OUTLOOK

Despite several action plans in place since Q1 2024, the difficulties to passthrough the full increase of salary cost in French cleaning business, combined with the Legacy Issues and the uncertain political environment in France, lead the Group to revise downwards its 2024 EBITDA and CFFO targets:

- Recurring EBITDA to be comprised in the range of €80m to €90m vs. €100m initially expected
- CFFO* in the range of -€10 to €0m vs. €20m to 30m initially expected. This assumption is before the impact of the recourse factoring (+€8m cash at June end) and is based on a prudent working capital assumption at year end

Since Q1 2024 the Group has been working on several action plans to secure its results. Further details to be provided in November 2024:

- Cost discipline
- Productivity efforts
- Commercial efficiencies
- Reassessment of the organizations

In this context the Group is working on re-assessing its 2025 expectations and will update the market at the end of the 2025 budget process

** Before refinancing fees*

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H1 2024 RESULTS

H1 2024: Performance highlights

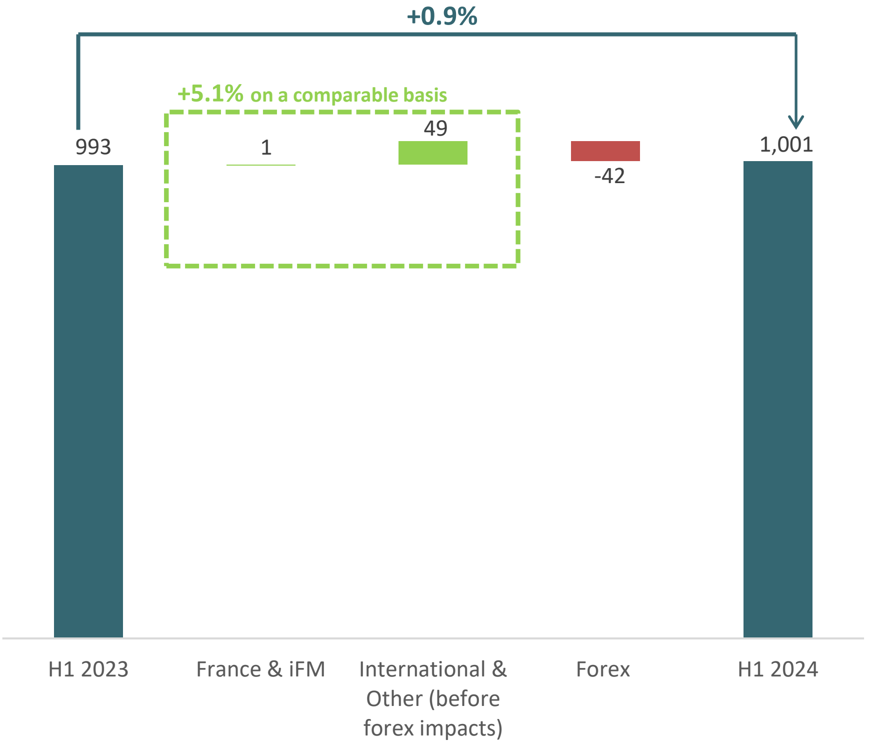
€ million	Q2 2024	Q2 2023	change	change @ comparable basis	H1 2024	H1 2023	change	change @ comparable basis
Net Sales	**500.7**	**493.7**	**1.4%**	**6.1%**	**1,001.1**	**992.5**	**0.9%**	**5.1%**
Recurring EBITDA	**22.8**	**27.0**	**-15.6%**	**-10.7%**	**39.9**	**43.3**	**-7.9%**	**-2.6%**
Recurring EBITDA Margin (%)	4.5%	5.5%	*-92 bps*	*-86 bps*	4.0%	4.4%	*-38 bps*	*-32 bps*
Operating Profit excl. non-recurring items	9.8	13.8	**(4.0)**		13.3	16.0	**(2.7)**	
Operating Profit	8.0	10.3	(2.3)		(4.6)	12.4	(17.0)	
Net Profit (loss) for the period from continued operations	**(10.8)**	**(12.5)**	**1.8**		**(45.4)**	**(26.2)**	**(19.2)**	
Net profit (loss) for the period	**(9.6)**	**(15.8)**	**6.2**		**(44.8)**	**128.3**	**(173.1)**	
Cash Flow from Operations (CFFO)	**26.2**	**10.2**	15.9		**(49.6)**	**1.6**	(51.2)	
CFFO excl non-recurring items	**34.6**	**13.8**	20.8		**(27.1)**	**6.0**	(33.1)	

(1) *US assets sold in 2023 are meeting the IFRS 5 criteria and reclassified as discontinued activities.*
(2) *H1 2023 net profit strongly benefited from the capital gain from the sale of UK, Ireland and Asia operations recorded in the discontinued operation line.*

H1 2024 highlights – Revenues

CEE and iFM improvement partly offset by negative trade balance in France driven by loss of contracts and to a lesser extend in Benelux, offset by CEE improvement

H1 Revenues
In € million



France & iFM:

- Despite improvement for iFM and cleaning operations, year-on-year growth impacted by negative trade balance
- Insufficient indexation plan

International:

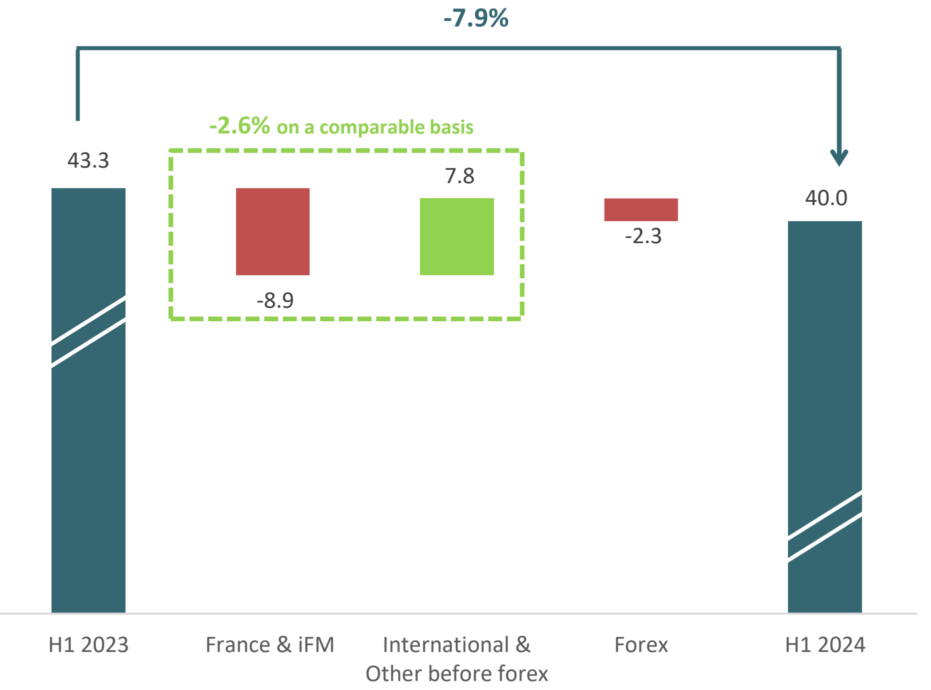
- Significant growth in CEE marginally offset by negative trade balance in Benelux, mainly due to the termination of low-margin contracts over the past 12 months

H1 2024 highlights - EBITDA

H1 2024 EBITDA improvement vs H1 2023 mainly driven by International operations and productivity efforts

H1 Recurring EBITDA

In € million



Margin down 38bps from 4.4% to 4.0%

H1 2024 EBITDA year-on-year decline mainly reflecting

- Positive contribution of productivity
- Positive CEE trade balance
- Lower holding costs

more than offset by:

- Negative trade balance in France, despite contracts wins
- Insufficient passthrough of the 2024 French staff cleaning cost increase

Simplified P&L

€ million	Q2 2024	Q2 2023	change	H1 2024	H1 2023	change
Net Sales	**500.7**	**493.7**	**+1.4%**	**1,001.1**	**992.5**	**+0.9%**
Recurring EBITDA	**22.8**	**27.0**	**-15.6%**	**39.9**	**43.3**	**-7.9%**
Recurring EBITDA Margin (%)	*4.5%*	*5.5%*	*-92 bps*	*4.0%*	*4.4%*	*-38 bps*
Depreciation and Amortisation	(13.0)	(13.2)	0.2	(26.6)	(27.3)	0.7
Provisions and Impairment losses (net)	-	-	-		-	-
Other income & expenses	(1.8)	(3.5)	1.7	(17.9)	(3.6)	(14.3)
Operating Profit	**8.0**	**10.3**	(2.3)	**(4.6)**	**12.4**	(17.0)
Operating Profit ex non-recurring items	**9.8**	**13.8**	(4.0)	**13.3**	**16.0**	(2.7)
Net financial expenses	(15.0)	(18.8)	3.8	(35.6)	(31.7)	(3.9)
Income tax expenses	(3.7)	(4.0)	0.3	(5.2)	(6.9)	1.7
Net Profit (loss) for the period from continued operations	**(10.8)**	**(12.5)**	**1.8**	**(45.4)**	**(26.2)**	**(19.2)**
Net income (loss) from discontinued operations	1.1	(3.3)	4.4	0.7	154.5	(153.9)
Net Profit (loss) for the period	**(9.6)**	**(15.8)**	6.2	**(44.8)**	**128.3**	(173.1)

Non-recurring items corresponding to refinancing (€16m) and €1.8m of other items in Q2 (mainly provision as part of the disposal of Lebanese operations in July 2024)

Lower net financial debt cost, mainly related to positive forex impacts in Q1 2023

H1 2023 included the capital gain in the sale of operations in UK, Ireland and Asia to CD&R

Note: In compliance with IFRS 5 in order to disclose the consolidated income statement comparative for the H1 as of June 30, 2024, the consolidated income statement for H1 ended as of June 30, 2023 has been re-presented to disclose the discontinued operations separately from the continuing operations.
Furthermore, in 2023 the Group decided to replace the aggregate "Operating income before depreciation, amortization, provision and impairment loss" on the face of the Income statement by "Operating income before depreciation, amortization and impairment loss". Provisions related to current operation such as bad debts; inventory provision, other operating provisions and retirement benefits provisions have been reintegrated in the new aggregate starting December 31, 2023. The results disclosed for June 30, 2023 are re-presented as per the new definition.

Simplified CFFO

€ million	Q2 2024	Q2 2023	change	H1 2024	H1 2023	change
Recurring EBITDA	22.8	27.0	(4.3)	39.9	43.3	(3.4)
Change in working capital requirements	32.2	8.6	23.7	(36.7)	1.6	(38.3)
Change in factor deposit	(3.3)	(0.9)	(2.4)	(0.2)	(2.8)	2.6
Income tax paid	(3.0)	(7.9)	4.9	(4.5)	(9.4)	5.0
Net capex	(12.3)	(10.4)	(2.0)	(25.9)	(24.8)	(1.1)
Operational	*(2.4)*	*(1.8)*	*(0.6)*	*(6.1)*	*(5.9)*	*(0.2)*
Leases	*(9.9)*	*(8.5)*	*(1.4)*	*(19.8)*	*(18.9)*	*(1.0)*
Elimination of non-cash items	(1.8)	(2.6)	0.8	0.4	(1.9)	2.2
CFFO excl non-recurring items	34.6	13.8	20.8	(27.1)	6.0	(33.1)
Non-recurring items	(8.4)	(3.6)	(4.8)	(22.6)	(4.4)	(18.1)
Cash Flow From Operations (CFFO)	26.2	10.2	15.9	(49.6)	1.6	(51.2)

Negative change in WCR hampered by the still too high level of account receivables (late billing). Situation improved in Q2 and is being worked upon.

€250m factoring line is maturing in September 2024. Constructive discussions with the banks are still underway. Outcome is expected in the next weeks.

Non-recurring items of -€22.6m in H1 2024, corresponding to refinancing costs, out of which €8.4 million in Q2 2024

Specific action plans in place aiming at structurally improving the management of WCR and smoothing its consumption over the year

⇒ **Results of these plans are expected to bear fruit as from the end of 2024, with full impact in 2025**

⇒ **Going forward, change in WCR is expected to be broadly neutral in the normal course of business, with some timing effects linked to the business seasonality on a quarter per quarter basis**

Net financial debt bridge

in € million

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CONCLUSION

Conclusion

- Significant achievements in H1, notably with the strengthening of the balance sheet with the refinancing, improvement of the CEE operations, contracts wins in France, better cash management.
- Nevertheless, H1 results are impacted by difficulties in the cleaning business in France to fully passthrough 2024 staff cleaning cost increase. Further actions are implemented to mitigate these impacts
- Legacy Issues, difficulties to passthrough the full French cleaning staff cost increase, combined with uncertain French political environment lead Atalian to revise downwards its 2024 EBITDA and CFFO targets, while re-assessing 2025 expectations. The Group will update the market at the end of the 2025 budget process

With a clear focus on quality of service and reactivity, ATALIAN has what it takes to succeed in the achievement of its customer-centric and profitability-oriented strategy

APPENDIX

DEFINITIONS

Comparable basis – Comparable basis information factors out changes in the scope of consolidation, such as divestments and acquisitions, excluding the USA, and currency translation effects

Recurring EBITDA - Recurring EBITDA (Earnings before interest, tax, depreciation and amortization) measures the performance of the Group excluding the impacts of depreciation & amortization and non-recurring items. It is defined as:

+ Operating profit (EBIT)
+ Depreciation, amortization and impairment of operating assets
+ Restructuring, litigation, one-time items and other income and expenses

Non-Recurring items - Non-Recurring items - comprise significant charges or income that, because of their one-time nature, cannot be viewed as inherent to the Group's regular course of business, such as strategic restructuring (impacting operations or the structure of the organization), litigations, impairments, capital gain or losses and other one-time items.

Net Financial Debt - Net financial debt ("Net debt") is an indicator to measure the financial debt of the Group after deduction of the cash. It is defined as:

+ Financial liabilities (long-term and short-term) including accrued interests and derivative liabilities
– Net cash and cash equivalents
– Derivative assets

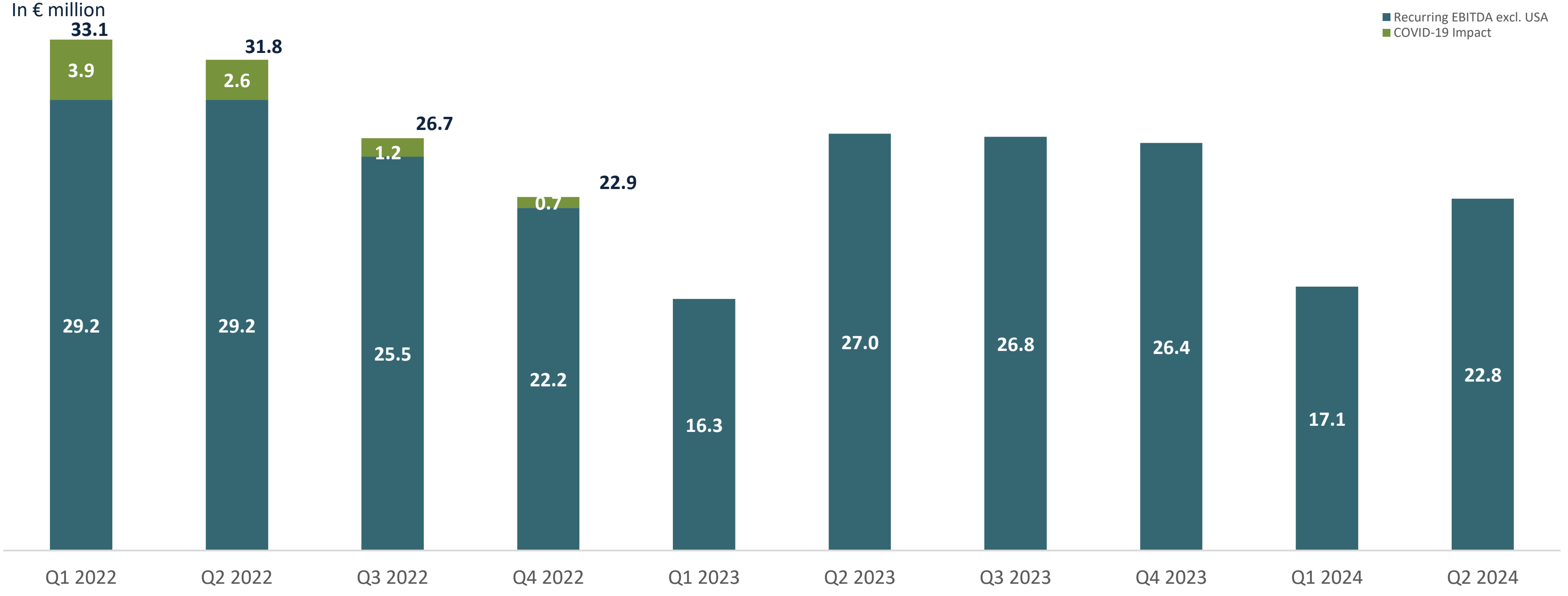
Cash Flow from Operations - Cash Flow from Operations ("CFFO") is an indicator to measure the level of cash generated by the operations of the Group after capitalized expenditures. It is defined as:

+ Recurring EBITDA
+/– Non-recurring cash items
+/– Other operating non-cash adjustments
+/– Change in working capital after non-recourse factoring
– Net capitalized expenditures, excluding leased capex
– Rent expenses and embedded interest related to IFRS 16
– Income tax paid

Free Cash Flow - Free Cash Flow is an indicator to measure the level of cash generated by the Group after payment of financial interest. It is defined as:
+ Cash flow from operations
– Net Financial interest paid, net of embedded interest

Quarter-by-quarter evolution

Recurring EBITDA
In € million



Cleaning wages revalorisations in France (FEP)

01/01/22	01/04/22	01/08/22	01/02/23	01/07/23	01/01/24
+3.0%	+1.05%	+2.9%	+3.0%	+2.5%	+2.5%

Segment by quarter

Segment number after holding costs re-allocation*

In € million		FY 2022	Q1 2023	Q2 2023	H1 2023	Q3 2023	Q4 2023	FY 2023	Q1 2024	Q2 2024	H1 2024
Net Sales		**1,923.8**	**498.8**	**493.7**	**992.5**	**496.1**	**514.5**	**2,003.0**	**500.4**	**500.7**	**1,001.1**
of which:	France	1,391.9	361.0	354.5	715.4	351.3	362.7	1,429.4	359.2	357.5	716.7
	International	536.0	139.3	140.2	279.5	146.8	153.7	580.1	142.2	145.9	288.1
	Other	(4.0)	(1.5)	(0.9)	(2.4)	(2.0)	(2.0)	(6.4)	(1.0)	(2.7)	(3.7)
Recurring EBITDA		**114.5**	**16.3**	**27.0**	**43.4**	**26.8**	**26.4**	**96.5**	**17.1**	**22.8**	**39.9**
of which:	France	108.9	15.9	26.2	42.2	21.9	19.8	83.8	15.5	17.8	33.3
	International	25.9	6.1	6.6	12.6	9.9	10.3	32.8	6.2	7.9	14.1
	Other	(20.2)	(5.7)	(5.8)	(11.5)	(5.0)	(3.6)	(19.6)	(4.6)	(3.0)	(7.6)
Recurring EBITDA Margin		**6.0%**	**3.3%**	**5.5%**	**4.4%**	**5.4%**	**5.1%**	**4.8%**	**3.4%**	**4.5%**	**4.0%**
of which:	France	7.8%	4.4%	7.4%	5.9%	6.2%	5.5%	5.9%	4.3%	5.0%	4.7%
	International	4.8%	4.4%	4.7%	4.5%	6.7%	6.7%	5.7%	4.4%	5.4%	4.9%
	Other	na	na	na	480%	na	na	na	na	na	na

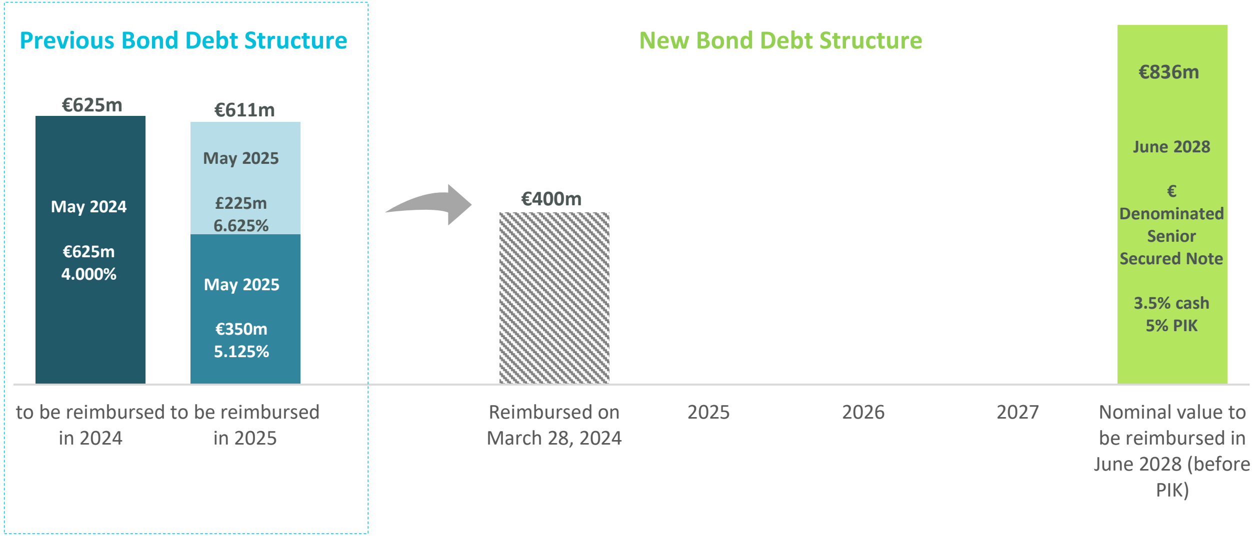
* As part of the new strategic plan and to better reflect the performance of each segment report, the Group has decided to re-allocate holding cost to each relevant segment vs. at Group level as previously reported.

Net financial debt

(In € million)	Dec-23	Jun-24
Net Cash & Cash Equivalents	**561**	**92**
Bonds	1,237	849
Factoring	26	34
Other	89	99
Total Gross Debt	**1,352**	**982**
Total Net Debt	**791**	**891**
Deconsolidated Factoring	187	193
Adjusted Net Debt	978	1,083

Refinancing aims at providing the company with a sustainable debt structure

A refinancing at par unanimously supported by the bondholders
Successful settlement of the Exchange Offer on March 28, 2024



- **Significant reduction in gross debt:**
  - Gross debt reduced by €400m post pay down
- **Extended maturity:**
  - Maturity of the debt extended by 4.5 years to June 2028
- **Notable reduction in annual cash interests:**
  - Annual cash interest costs to be reduced from c.€60m/year to c.€30m/year

Rating upgraded by rating agencies in April 2024:

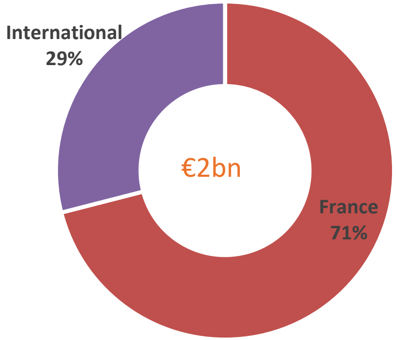
- S&P: Upgraded to CCC+
- Moody's: Upgraded to Caa3

ATALIAN today

A leading independent pan-European provider of facility management services, able to support the largest international groups in a variety of industries

KEY FY 2023 NUMBERS

Net Sales
Geographical breakdown



c. 65,600
employees

19
countries

Independant
with 85% of the services self-delivered

A WIDE RANGE OF OPERATING ENVIRONMENTS AND SECTORS

Operate in thousands of production, office, medical, mobility, living and leisure spaces, ensuring that they are healthier, safer, more comfortable and functional

- OFFICES
- INDUSTRIES
- MASS RETAIL MARKET
- SALES AND SERVICE AREAS
- HOTEL
- PUBLIC AREAS
- TRANSPORT AND LOGISTICS
- HEALTHCARE ESTABLISHMENTS
- HOUSING

A WIDE AND INTEGRATED RANGE OF SERVICES

Provide single service, multi-service and iFM solutions to enable our customers to focus on their core business and improve their economic, social and environmental performance

Cleaning represents c. 3/4th of the Group's net sales

- Facility Management
- Cleaning & associated services
- Maintenance
- Mobility areas
- Supply Chain handling
- Energy management
- Safety, surveillance & Security
- Space Management
- Hospitability & related services

A customer-centric and profitability-oriented strategy based on 5 core pillars and supported by the refinancing

ATALIAN FACILITIES

1 Building a pan European Group

- Almost achieved following the disposal of US activities
- Current geographic footprint sufficient to respond to clients with multi-countries needs

STATUS: Achieved

2 Improving Profitability

- Price increase
- Special Works proactive development
- Allocated resources optimization
- Procurement policy
- Structure optimization
- Process digitalization

STATUS: Ongoing

3 Organic growth

- Indexation
- Special Works proactive development
- Better customer retention
- Enlarge existing contracts
- Acquire new customers leveraging our segment expertise

STATUS: Ongoing

4 Developing Integrated FM

- Increasing industrial clients' demand for global solutions
- Increase Hard FM in our mix: activities with higher margins and barriers to entry
- Enhance ATALIAN's historic Soft FM activities through enlarged offerings

STATUS: Ongoing

5 External growth strategy

- Bolt-on logic privileging high synergies

STATUS: To come

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