

Paris, France, October 30, 2013

Third quarter revenue 2013: €412.3 million

- Consolidated revenue for the third quarter 2013 amounted to €412.3 million (-2.6% like-for-like) in an environment which remained difficult
- Germany and the Other Europe region were almost stable while the United Kingdom and France declined by a respective 3.9% and 2.8% like for like
- The book to bill ratio in the cyclical activities stood at 0.97 at September 30, 2013 (0.98 at September 30, 2012)

First nine months 2013 consolidated revenue

In € million	9 months 2012	9 months 2013	Growth
Revenue	1374.5	1286.1	-6.4%
Change in consolidation scope*	-29.0		
Currency variation	-28.3		
Pro-forma revenue	1317.1	1286.1	-2.4%

* Impact of the disposal of the Spanish activities in 2012

First nine months 2013 revenue by geographic region

In € million	9 months 2012**	9 months 2013	Organic growth
United Kingdom	523.9	504.5	-3.7%
France	434.1	413.7	-4.7%
Germany	175.5	179.2	2.1%
Other Europe	183.7	188.7	2.7%
Total	1317.1	1286.1	-2.4%

** Like-for-like revenue (base 2013)

Activity in the third quarter 2013

Third quarter 2013 revenue by geographic region

In € million	Q3 2012*	Q3 2013	Organic growth
United Kingdom	167.0	160.5	-3.9%
France	138.8	135.0	-2.8%
Germany	60.6	60.4	-0.5%
Other Europe	56.8	56.5	-0.4%
<u>Total</u>	<u>423.2</u>	<u>412.3</u>	<u>-2.6%</u>

** Like-for-like revenue (base 2013)

In the prevailing difficult demand environment, third quarter 2013 activity remained negative with a 2.6% decline in like-for-like revenue.

The trend slightly improved in the Finance (-6.1% in the third quarter versus -9% over the first six months) and Utilities/Telecommunications/Transport sectors (+5.8% in the third quarter versus -0.1% over the first six months) but deteriorated in the Public Sector (-5% in the third quarter versus -0.6% over the first six months) principally in the United Kingdom and France.

The book to bill ratio in the cyclical activities¹ stood at 0.97 at September 30, 2013 (0.98 at September 30, 2012).

In the United Kingdom, third quarter revenue contracted by 3.9% like for like. As announced early in the year, the implementation of major rationalisation projects in the Public Sector by the British government has opened up some very significant opportunities for the Group whose conclusion could materialise by the end of the year but has led, in anticipation, to a reduction in some existing areas of activity. The Banking sector remained down over the quarter but the Utilities/Transport/Telecommunications sector confirmed its dynamism with strong growth over the quarter. At September 30, 2013, the book to bill ratio in the cyclical activities¹ was 0.98 (0.64 at September 30, 2012). The pipeline increased thanks, in particular, to the opportunities in the Public Sector, representing 2.5x projected annual revenue (2.2x at end September 2012).

In France, activity was down by 2.8% against a backdrop still characterised by a marked wait-and-see approach from customers. The pace of the revenue decline slowed in Banking while the Utilities/Telecommunications/Transport sector was stable over the quarter and the trend deteriorated in the Public Sector. At September 30, 2013, the book to bill ratio in the cyclical activities¹ was 1.01 (1.23 at September 30, 2012). The pipeline improved to 2.2x projected annual revenue (2.1x at September 30, 2012).

In order to accelerate the implementation of the Group's strategy around the value of its offerings in this region, discussions were initiated with the employee representatives within the framework of a project aimed at improving competitiveness with a goal to increase operating profitability by around €20m by 2015.

¹ Consulting, Systems Integration and Testing

In Germany, the third quarter saw a slight decline in activity (-0.5%). The dynamic remained positive in the Public Sector and Banking but contracted in the Utilities/Telecommunications/Transport sector. At September 30, 2013, the book to bill ratio in the cyclical activities¹ stood at 0.95 (0.85 at September 30, 2012).

In the Other Europe region, the organic change in revenue was -0.4% marked by a decline in Belgian activity following the end of the integration contract subsequent to the successful deployment of the Schengen Information System II (SIS II). In Scandinavia, organic growth remained strong at +12.4%. At September 30, 2013, the book to bill ratio in the cyclical activities¹ stood at 0.93 (0.71 at September 30, 2012).

Outlook

The Group expects a relatively stable fourth quarter 2013 revenue relative to the fourth quarter of the previous year.

Given the new business currently in the negotiation process, the Group has every confidence in its ability to record strong order intake in the fourth quarter 2013 and therefore to achieve significant organic growth in 2014.

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SBF 120 General Index, NEXT 150, CAC MID&SMALL, CAC MID 60, CAC Soft&CS, CAC Technology, Euronext FAS IAS

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About Steria: www.steria.com

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