



# TECHNOLOGY PARTNER FOR OUR CUSTOMERS' KEY OPERATIONS

Corporate presentation  
March 2018

# Global technology and consulting company

€3,011+ M  
2017 revenues

40,000  
professionals



Commercial  
operations

140+  
countries



Comprehensive offer of high  
value-added proprietary  
solutions and  
advanced services



R&D&i 5%-8% of revenues  
200+ agreements with research  
centers and universities



Major customers  
in key sectors and  
geographies

# Differential business model

## CUTTING-EDGE TECHNOLOGY FOR OUR "CORE" BUSINESS OPERATIONS

- **Expert knowledge** of the key processes
- Bellwether **proprietary products**

## STRONG CUSTOMER ORIENTATION

- Optimized **service provision model** and enhanced **efficiency** of operations
- **Unique culture** of adaptation to customer requirements



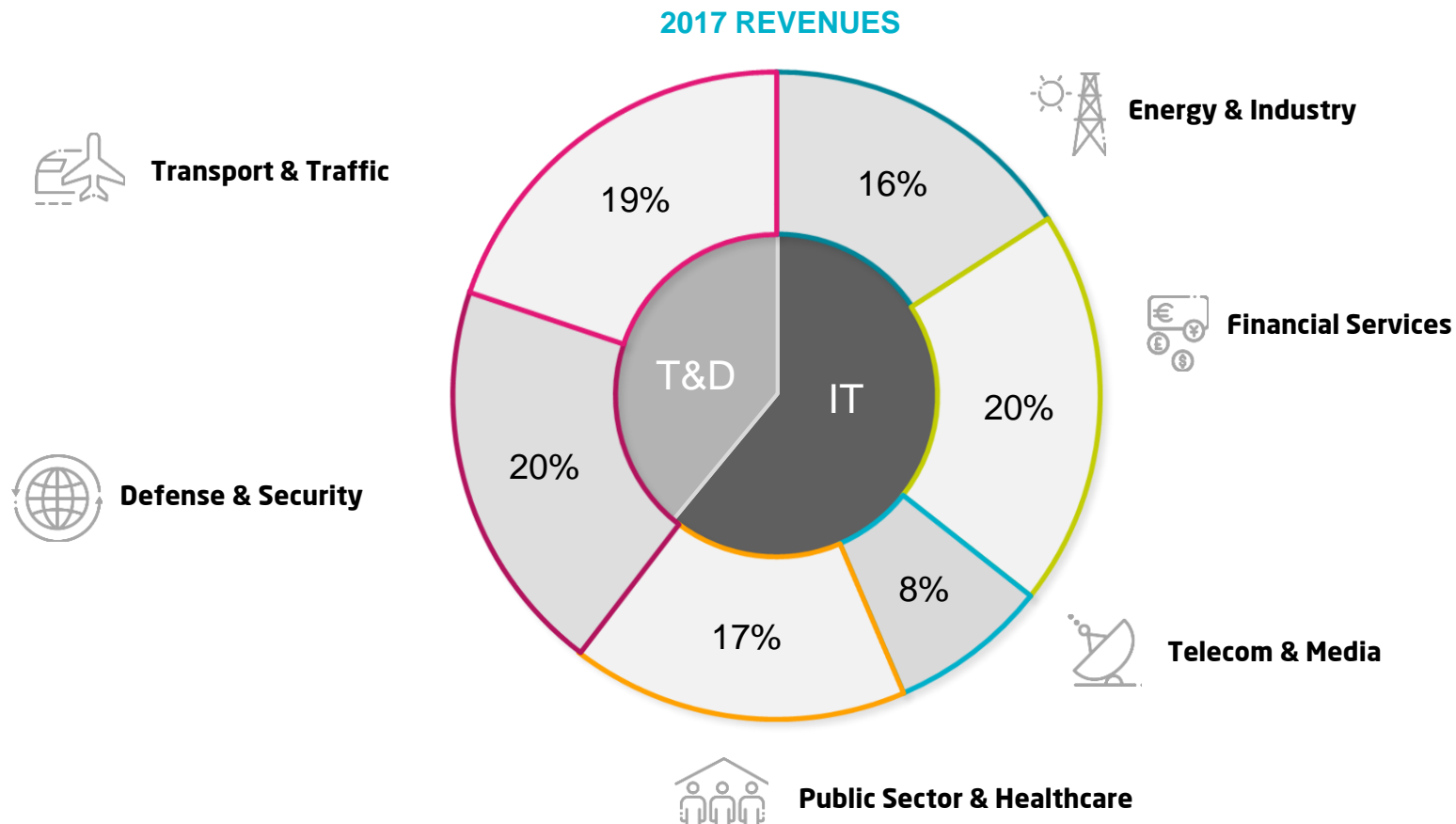
## THE TALENT OF OUR PROFESSIONALS

- **Global experience** with **locally-based** teams
- **Differential abilities and skills**

## PORTFOLIO OF TECHNOLOGY SOLUTIONS

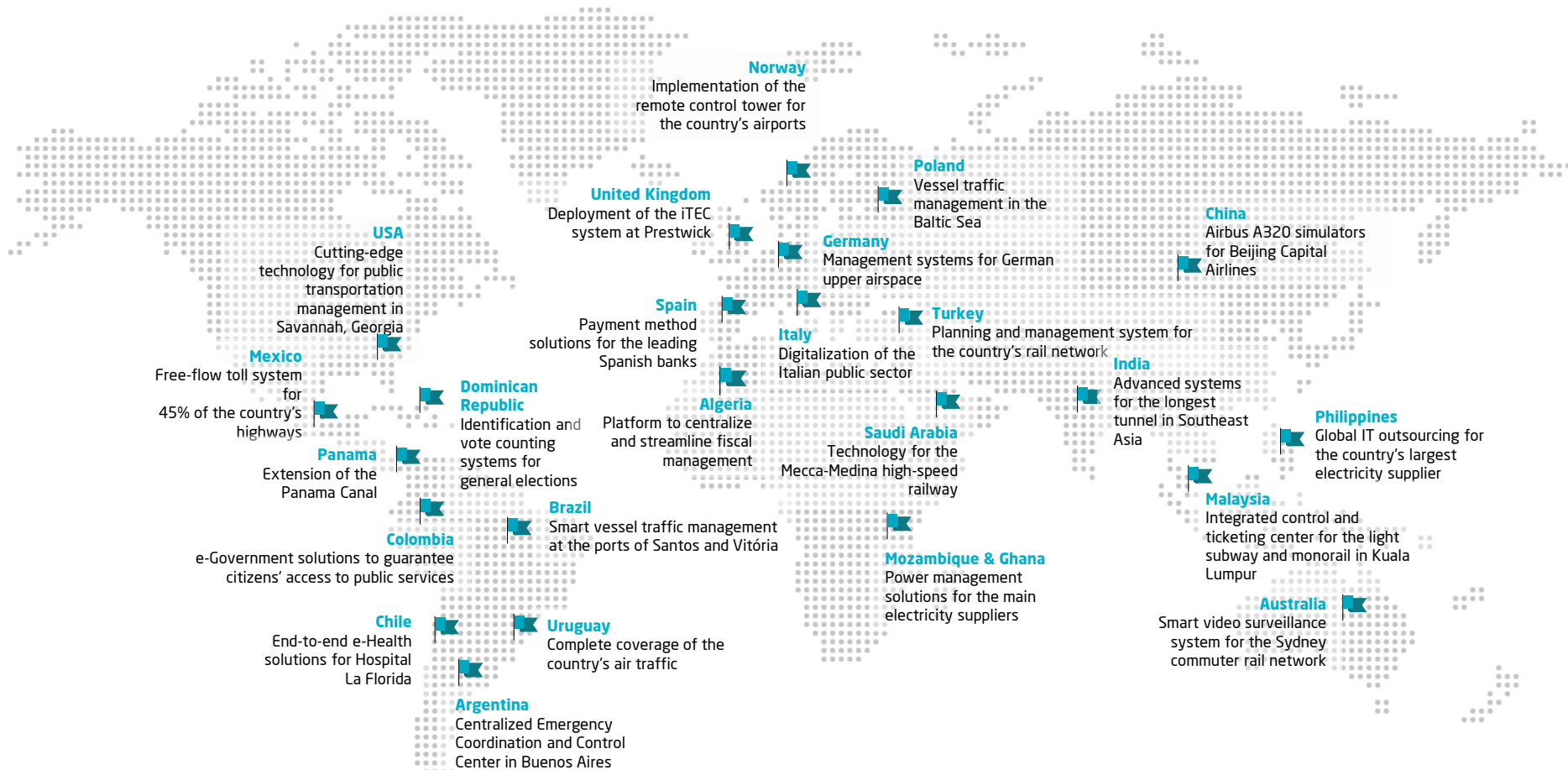
- **Balanced** and diversified
- **Knowledge of the key competitive factors** in different sectors

# Main Spanish provider of technology solutions for different industry sectors



The world's leading provider of proprietary solutions in the Transport and Defense markets and a bellwether in Information Technology in Spain and Latin America

# Key projects around the world



# The best talent to develop the most innovative solutions

# 40,000

professionals with a high degree of geographic, functional and cultural diversity make up our multidisciplinary teams

## Smart Start

Commitment to young professionals channeled through a program that recruits more than 2,000 juniors and interns worldwide every year

**SMART START**  
PROGRAMA DE JÚNIORS Y BECARIOS

## Indra Open University

An innovative corporate university model adapted to the new training needs



## Career Planning

Individualized Career Planning Model adapted to the different profiles and based on the principles of clarity, mutual commitment and differentiation



## Intrapreneurship

Intrapreneurship to encourage the generation of original and disruptive ideas and foster a culture of innovation

**INNOVATORS**

# We are committed to innovation as a means for addressing the challenges faced by our customers in a constantly evolving environment

More than €1,000M dedicated in R&D&i in the last six years

An open, agile and flexible innovation model to support and accelerate disruptive ideas



Accelerates innovation through:  
Intrapreneurship and  
collaboration with startups,  
universities and technology centers



# Offer and main customers

World leader in the development of end-to-end technology solutions



Transport  
& Traffic



Defense  
& Security



Energy  
& Industry



Financial Services



Telecom  
& Media



Public Sector  
& Healthcare



# Transport



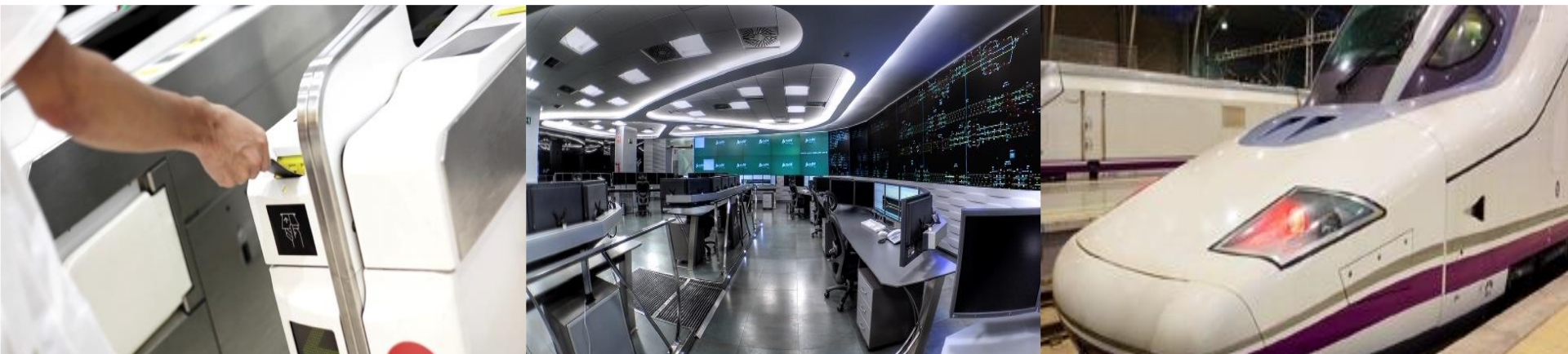
## The most advanced solutions for the worldwide transport sector

Technology provider for some of the world's most ambitious transport infrastructure projects, such as the Mecca high-speed railway, Panama Canal and urban tunnels in London

More than 2,500 projects executed in 100 cities across more than 50 countries

### Main products and solutions

- Security and protection systems (railway signaling, smart video surveillance, automation, road safety)
- Management and operational support solutions (ports, airports, rail networks, road traffic and transport)
- Collection systems (ticketing and tolls)
- Information systems and systems to enhance the user experience



# Transport



## Some of our main customers:

Railway infrastructure managers and/or operators: Saudi Railways, ADIF, Renfe, Sydney Trains, TCDD (Turkey)

Subway systems in Madrid, Shanghai, Lisbon, Mumbai, Delhi, Kuala Lumpur, Cairo, Riyadh, Barcelona

Airport authorities in Angola, Kenya, Guatemala, Mexico, Indonesia

Highway and tunnel operators in Spain, Portugal, Ireland, United States, Canada, Mexico, Chile, Brazil, Argentina, Colombia, Morocco, China, India, United Kingdom

Port operators and authorities in Chile, Brazil, Uruguay, Panama, Spain, Cyprus, Morocco, Portugal

## Impacts on customers and citizens

- ✓ Reduction of fraud in public transportation by 30%, thanks to the automated ticketing systems
- ✓ Punctuality rate of 98% for regular train and bus lines managed with the NAUTA and DaVINCI solutions
- ✓ Improvement by 80% of times for detecting defective components
- ✓ Reduction of maintenance costs by 15%
- ✓ The port of Southampton (United Kingdom), among the top 5 ports with highest growth of cargo movement since implementing the iMARE system



# Air Traffic (ATM)



High technology to improve the safety and efficiency of air traffic worldwide

World leaders: 4,000 facilities across more than 160 countries

The main control centers in Europe use our latest-generation systems

Co-leaders of the Single European Sky project

## Main products and solutions

- Automation (air traffic and approach centers, tower and remote control towers)
- Simulation (training, practice and augmented reality)
- Radio aids
- Surveillance (primary, secondary and surface radars)
- Communication
- Aeronautical information





# Air Traffic (ATM)



## Some of our main customers:

Enaire (Spain)

Eurocontrol (European  
Organization for the  
Safety of Air Navigation)

NATS (United Kingdom)

DFS (Germany)

DSNA (France)

ATMB (China)

AAI (India)

PACA (Oman)

AsA (Australia)

Avinor (Norway)

COCESNA Central American  
Corporation for Air Navigation  
Services)

DGCA (Colombia)

CORPAC (Peru)

## Impacts on customers and citizens

- ✓ Indra technology provides Oman with the capacity to triplicate the number of flights managed in its airspace, as well as revenues
- ✓ The iTEC solution enables more efficient flying, thanks to the use of 4D trajectories: the reduction by 30-40 nautical miles per route enables aircraft to save 140 million euros annually in fuel
- ✓ Indra systems implemented in the Eurocontrol air control center in Maastricht and at DFS in Karlsruhe have resulted in opening the first direct routes in central Europe, reducing fuel consumption by 9,000 tons and CO2 emissions by 30,000 tons
- ✓ Growth of 40% of traffic volume in air control centers in India and reduction of workload, thanks to Indra systems
- ✓ Reduction of fuel consumption by 12,000 tons per year in the air space of Central America after implementing its technology and redefining processes for COCESNA
- ✓ Increase by 15% in the capacity of the Heathrow airport runways in low-visibility conditions, thanks to the implementation of ILS systems, moving up from 26 to 30 landings per hour



# Defense



## Advanced solutions and systems for the five dimensions of defense: land, sea, air, space and cyberspace

Development and implementation of air defense, command and control, and radar systems across all five continents

World leader in electronic defense systems for naval, air and land platforms, command and control, and air defense

More than 200 simulators delivered to more than 50 customers across 23 countries

### Main products and solutions

- Radar systems and command and control systems for land, air and amphibious operations
- Electronic intelligence
- IT (for defense applications)
- Unmanned vehicles (UAV, UVS)
- CBRNe systems ((Nuclear, radiological, biological, chemical)
- Countermeasure systems for aircraft (DIRCM)
- Electro-optical systems
- System maintenance and logistical support
- Simulation and automatic maintenance
- Services and solutions for the space sector
- Cyber defense



# Defense



## Some of our main customers:

Armed forces of Spain, Peru, Argentina  
Chile, Uruguay

NATO

European Space Agency (ESA)

Hispasat

Eurofighter

US Navy

Comisión Naval Brasileña

Ministerio de Defensa de Colombia

Marina de Alemania

Marina de Italia

Airbus

Lockheed Martin

## Impacts on customers and citizens

- ✓ Air defense systems contribute toward guaranteeing the sovereignty of the air space managed by each country, thanks to integrated surveillance solutions and management of communications, control and air space defense at all times, flight levels and in all situations
- ✓ Unmanned systems provide society service through civil uses, like coastal surveillance; detection of fishing grounds; protection and surveillance of natural and cultural heritage; control of spills; and support during fire extinction processes





# Security



## Technology to improve citizen security and protect infrastructures

Nearly 6,000 km of coastline all over the world monitored by our systems

Leaders in secure identification systems: more than 30 million documents issued

Pioneering emergency management systems in Europe and Latin America

International network of benchmark i-CSOC and cybersecurity centers

### Main products and solutions

- Border surveillance
- Vessel traffic management (VTS)
- Citizen security
- Emergency control centers
- Critical infrastructure protection (CIP)
- Secure communications
- Cybersecurity and authentication (electronic identity, smart borders, cyber training systems)





# Security



## Some of our main customers:

European Commission

Home offices (Spain, Portugal)

Security forces and corps worldwide

Hong Kong Maritime Police

Spanish Civil Protection

Military Emergency Unit

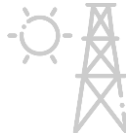
Port managers (United Kingdom, Brazil, Chile, Spain, Morocco)

## Impacts on customers and citizens

- ✓ 8 of 10 emergencies of the Integrated Security and Emergency Center of Madrid are managed in under 8 minutes
- ✓ The maritime surveillance systems save lives, as they enable surveilling over broad extensions and detecting and aiding small boats, like those used by immigrants to try to reach Spain's coasts
- ✓ The maritime surveillance systems detect the transport of illegal goods, like drugs and tobacco; illegal spills; and illegal fishing activities in a country's waters. It also enables detecting emergencies at sea and coordinating maritime rescue operations



# Energy



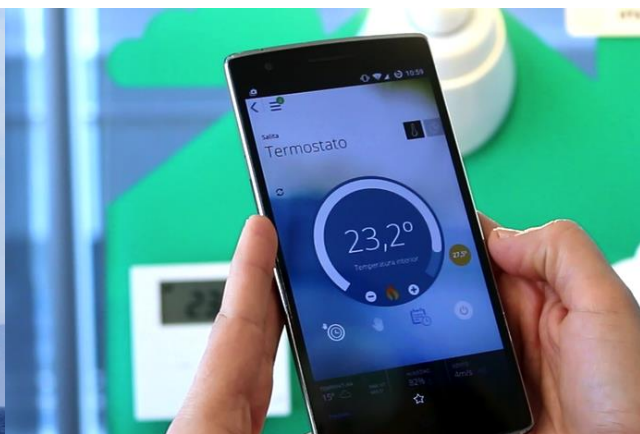
Our advanced solutions have been successfully deployed in more than 140 utilities of about 50 countries

Our technology enables companies all over the world to directly manage more than 100 million customers

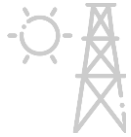
Range of solutions for the entire sector value chain (generation, distribution, retailing)

## Main products and solutions

- Solutions for electricity, gas and water utilities (InPOWER and InDROP)
- Support for the key business processes of a utility (InGEN, InGRID and InCMS)
- High value-added products and services with partner solutions
- Oil & Gas: detection of spills, ETRM/ trading, asset management, third-party solutions (SAP Oil, IHS, Tieto EC)
- Platform for the comprehensive management of the connected home
- Transactive energy: new business models based on distributed energy resources and the relationship with prosumers



# Energy



## Some of our main customers:

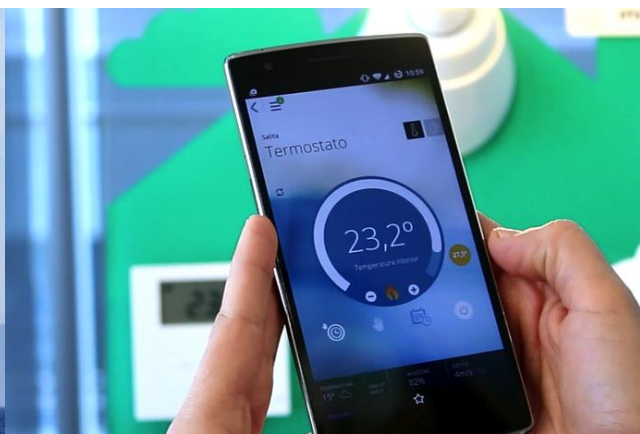
### Electricity, gas and water utilities:

Gas Natural Fenosa	Exelon
Enel	KPLC
Iberdrola	Meralco
CEZ	Origin
EDP	Sedapal
REE	Electrodunas
Electrobras	Manila Water
CFE	

### Companies specializing in the production, transformation and retailing of oil and its :

Repsol	BP
Petrobras	Enagas
Ecopetrol	Petroperú
PEMEX	Caltex
ENI	

- ✓ Reduction by up to 30% of OPEX costs in the IT realm, thanks to Indra's specialized upstream services, maintaining service quality and improving execution times
- ✓ Reduction by at least two minutes of response times for early detection of hydrocarbons on the ocean surface
- ✓ Increase of energy retail margins of over 20%, thanks to reducing losses and optimizing operating costs
- ✓ Reduction by 25% of energy supply outage times for the end client
- ✓ Reduction of network operating and maintenance costs by at least 10%
- ✓ Reduction of operating costs by more than 20% at power stations, thanks to generation solutions
- ✓ Decrease of about 30% of energy consumption for the end client





# Industry & Mass Market



Benchmark partners for the transformation of industry, with proprietary solutions to accelerate the impact on our customers' business

Leaders in revenue accounting solutions for airlines: more than 30 customers across all five continents and more than 130 million passengers handled every year with our technology

## Main products and solutions

- Suite of proprietary solutions (Suitair for the airline sector (revenue accounting, booking, loyalty, CRM, SEO, deployment NDC projects, user experience)
- Digital solutions for the retail and fashion sectors (Smart Store)
- Suite for the hotel sector (TMS Hotels)
- ERP systems and modernization of processes for the consumer goods and manufacturing sector
- Industry 4.0 (digital enablers for the smart connected industry)



# Industry & Mass Market



## Some of our main customers:

Coca-Cola

Ford

Inditex

Carrefour

Mercadona

LATAM

Seat

Abertis

Heineken

Prosegur

Bayer

## Impacts on customers and citizens

- ✓ Reduction by 30% of airline ticket distribution costs
- ✓ Reduction by 20% of production costs
- ✓ Reduction by 50% of unscheduled production stoppages
- ✓ Increase close to 50% of manpower productivity
- ✓ Reduction by 50% of inventory costs
- ✓ The products' time to market is cut in half
- ✓ Reduction by 40% of production plant maintenance costs



# Financial Services



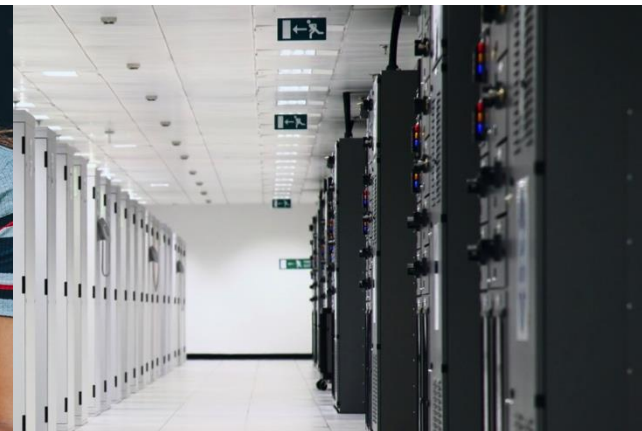
Our customers include the main Spanish entities and more than 50 major entities worldwide

Leadership based on proprietary solutions. We manage more than 100 million cards a year, with more than 100,000 points of sale and 7,000 ATMs.

Robust presence in Latin America: our customers represent more than 40% of total bank assets in the region

## Main products and solutions

- Efficiency and operations: solutions and services for the automation, robotization and transformation of operations, process outsourcing
- Informational risk: solutions based on innovative models and the exploitation of big data for informational risk (credit, operational, liquidity, market, recoveries, asset valuation)
- Core: suite of modular solutions for financial and insurance entities
- Digital banking & insurance: mobility solutions, contextual banking, digital onboarding, commercial segmentation, business analytics





# Financial Services

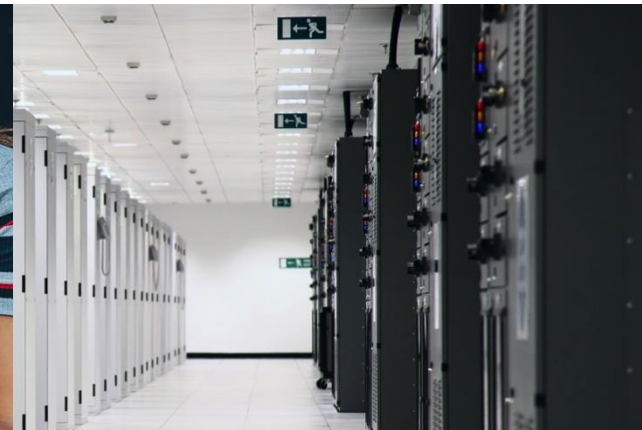


## Some of our main customers:

Grupo BBVA	CaixaBank
Grupo Santander	Banco de España
Abanca	Caixa Econômica Federal (Brazil)
Banca March	Banco de Chile
MAPFRE	Banco de la República (Colombia)
Sanitas	Seguros Bolivar (Colombia)
Adeslas	Central Bank of Morocco
Aliaz	Banca Nazionale del Lavoro(Grupo
Banco Sabadell	BNP Paribas)

## Impacts on customers and citizens

- ✓ Reduction by 20% of the costs of capturing new customers for banking
- ✓ Improvement by 30% of payment method management (cards) in terms of operating efficiency
- ✓ Practical elimination of service interruptions related with cards
- ✓ Increase by 50% of consumer credit sales ratios





# Telecom & Media



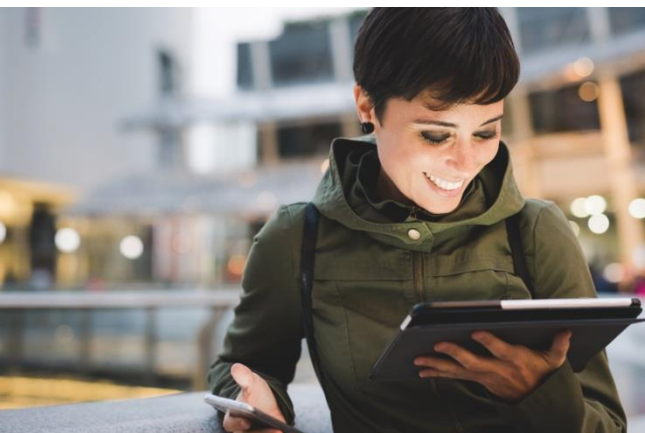
## Innovative solutions to give our customers a competitive edge

More than 300 million customers of telecommunications operators worldwide are managed with our solutions and services

Benchmark company in the creation of interactive services for television

### Main products and solutions

- Deployment of telecom systems for business (BSS) and operations support
- Transmission, broadcasting advertising management and copyright systems
- Solutions and services for deploying and monitoring digital TV and fiber networks
- Secure value-added telecom and OTT communications service platforms
- Advanced customer- and network-oriented analytics solutions
- Digital audiovisual content management systems
- Integrated Telco and New Media solutions: OTT (IPTV), CMS-Player, second Screen



# Telecom & Media

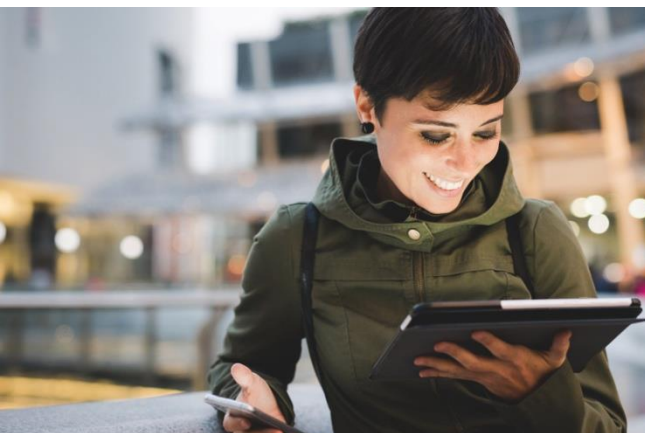


## Some of our main customers:

Telefonica/Movistar	Atresmedia
Orange	RTVE
Vodafone	Sky TV
Telecom Italia	Mediaset
Portugal Telecom	Endemol
PLDT/Smart	Televisa
Globe	Une

## Impacts on customers and citizens

- ✓ Increase of up to 20% in the level of automated management of customer calls to the Contact Center
- ✓ Reduction of 70% in processing times of the Data Warehouse with Big Data architecture
- ✓ ROI under three months due to automating manual back office processes
- ✓ Reduction of fiber optic supervision costs by up to 60%



# Public Administrations



We innovate with public administrations to improve services and make them more accessible to citizens

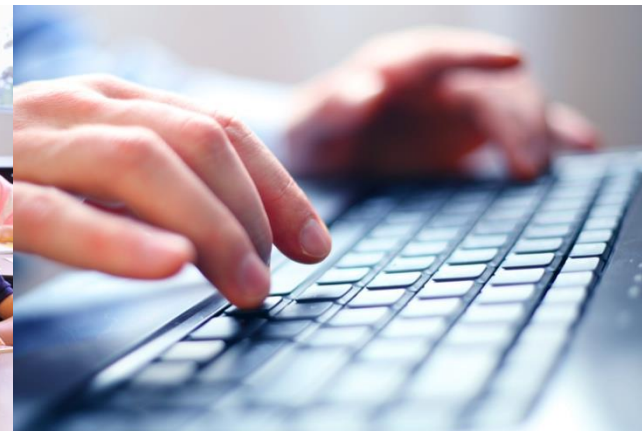
Nearly 50 million citizens and more than 250,000 public-sector employees benefit from our solutions

Market leader in the development of smart cities with a comprehensive offer

We have participated in approximately 400 election processes worldwide, handling nearly 4 billion voters

## Main products and solutions

- Judicial management systems
- Integrated tax management
- Cadastral management systems
- End-to-end e-Government solution
- Solutions for digital education
- Solutions for city transformation and integrated management (Smart Cities)
- Solutions and services for the entire life cycle of the Electoral Process





# Public Administrations

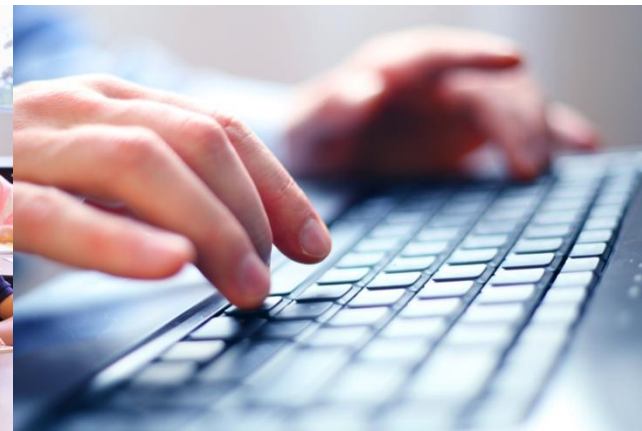


## Some of our main customers:

Colombian judiciary	Ministerio de Empleo y Seguridad Social de España
Spanish Lord Chancellor's Office	Ministerio de Economía, Hacienda y AAPP de España
Isituto di Sicurezza Sociale de Italia	Agencia Tributaria de España
Brazilian Ministry of Education	Ministerio de Interior de España
Philippines Bureau of Internal Revenue	Ministerio de Interior de Portugal
European Patent Office	Ministerio de Interior de Argentina
Regional Government of Galicia	Oficina de Normalización Previsional de Perú
A Coruña City Council	
Tunja municipal administration (Colombia)	

## Impacts on customers and citizens

- ✓ Reduction of 20% in resolution times for legal action and of up to 60% in displacements of professionals and citizens to courts, thanks to the use of digital technologies
- ✓ Reduction of up to 30% of publication times for public procurement processes
- ✓ Increase of up to 50% in effectiveness of inspections, thanks to fraud detection systems
- ✓ Reliability of 99.9% in tests for automated correction and drastic reduction of correction times: from months to days, even hours



# Healthcare



More than 33 million people benefit from our healthcare solutions

Leader in the implementation and development of applications for Spain's national health system

500,000 appointments for patients are arranged every day in Spain, all thanks to our technology

## Main products and solutions

---

- Health Network
  - Clinical station
  - Administrative station
  - Structural modules
- Health Data
  - Unified desktop
  - Standardized information repository
  - Data analysis repository
- Health Connect
  - Omnichannel patient relations platform
  - Health campaigns
  - Patient monitoring



# Healthcare



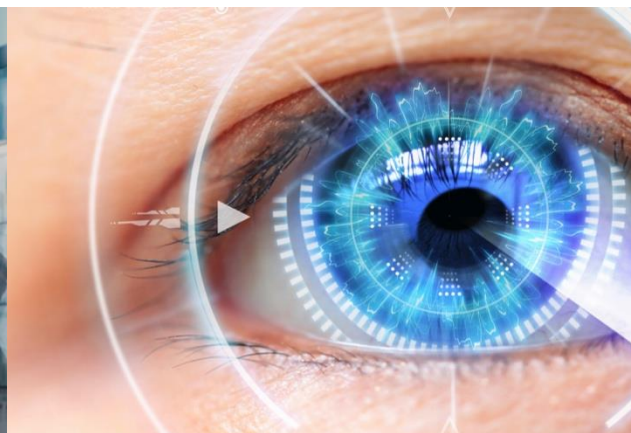
## Some of our main customers:

Hospital La Florida (Chile)  
Hospital de Makati (Philippines)  
Spanish Ministry of Health  
Spanish Social Security Agency  
Chilean Ministry of Health

Andalusian Health Service (SAS)  
Galician Health Service (SERGAS)  
Madrid Health Service (SERMAS)  
Valencian Health Agency (AVS)  
Quirónsalud Hospital Group

## Impacts on customers and citizens

- ✓ Return of 2.7 euros for each euro invested in patient-oriented technology
- ✓ Reduction of 42% in the request of diagnostic tests, thanks to the implementation of assisted management systems
- ✓ Increase of 38% in productivity of agenda management and reduction of 14% in unscheduled absences of patients to medical appointments, thanks to multichannel information services



# Digital Transformation



minsaït  
by Indra

The greatest concentration of knowledge in Digital Transformation  
3,000 professionals worldwide with different capabilities from strategy to execution

## Business consulting

Strategy  
Value proposition  
Business model  
Business plan  
Operating model  
Action plan  
Implementation of business solutions



Strategy Consultants



Management Consultants

## Advanced technology

Architecture  
Design  
Implementation of technology  
Support



Technology Consultants



Solutions Architects



Cybersecurity Experts



Experience Designers



Data Scientists

## Digital solutions

Portfolio of solutions  
Product design and development  
Specialized support



Product Designers & Experts



# Digital Transformation



minsait  
by Indra

Indra completes the value proposition of its Minsait business unit after acquiring Paradigma, a digital transformation consulting firm having a leading role for offers in 'digital native' formats

Minsait and Paradigma united provide the market with a unique and more comprehensive offering to cover the end-to-end digital transformation needs of companies and institutions by integrating business and digital dimensions with the provision of services and products

This combines business vision, an extensive understanding of emerging technologies such as IoT and Big Data, and an agile project execution methodology

Minsait's constantly evolving portfolio contains products and business solutions with a single common denominator: impact-driven



**indra**

Avda. de Bruselas 35  
28108 Alcobendas,  
Madrid Spain  
T +34 91 480 50 00  
F +34 91 480 50 80  
[www.indracompany.com](http://www.indracompany.com)

