

SGS Virtual
Investor Days
2021



Industries & Environment

Energy transition in focus

May 27, 2021

Industries & Environment

Vision and 2023 ambition

- **Vision:** helping industry to transition to sustainable forms of energy and operations, while supporting their traditional businesses. We seek to **re-shape and substantiate the new business approach** to the wide range of end-markets aiming to facilitate and support the ambitions of our customers related to the environment and society
- **How:** we will leverage our diverse portfolio of services and global network to **achieve sustainable and profitable growth** with an optimal balance between project and recurring revenue
- **Major focus areas:**
 - Energy transition
 - Sustainability / Industrial and Public Health and Safety
 - Transform and Enhance under **Safe, Green, Smart** journey:
 - Evolve
 - Modernize
 - Go digital



SBU vs. Target Markets

Industries & Environment SBU		Market Penetration			
		Mining, Energy and Power	Manufacturing	Building and Infrastructure	Rail, Auto, Shipping
Industrial and Public Health and Safety	Segments	✓	✓	✓	✓
		✓	✓	✓	✓
		✓	✓	✓	✓
Technical Assessment and Advisory	Segments	✓	✓	✓	✓
		✓	✓	✓	✓
Environmental Testing	Segments	✓	✓	✓	✓
Field Services and Inspection	Segments	✓	✓	✓	✓
		✓	✓	✓	
		✓	✓	✓	✓
		✓			✓
		✓			
Specialty Services	Segments	✓			
		✓			
		✓	✓	✓	✓
Government Mandates	Segments				✓
				✓	
				✓	

Focus Markets for 2023

Industries & Environment

SBU market position, capex/NWC intensity and return

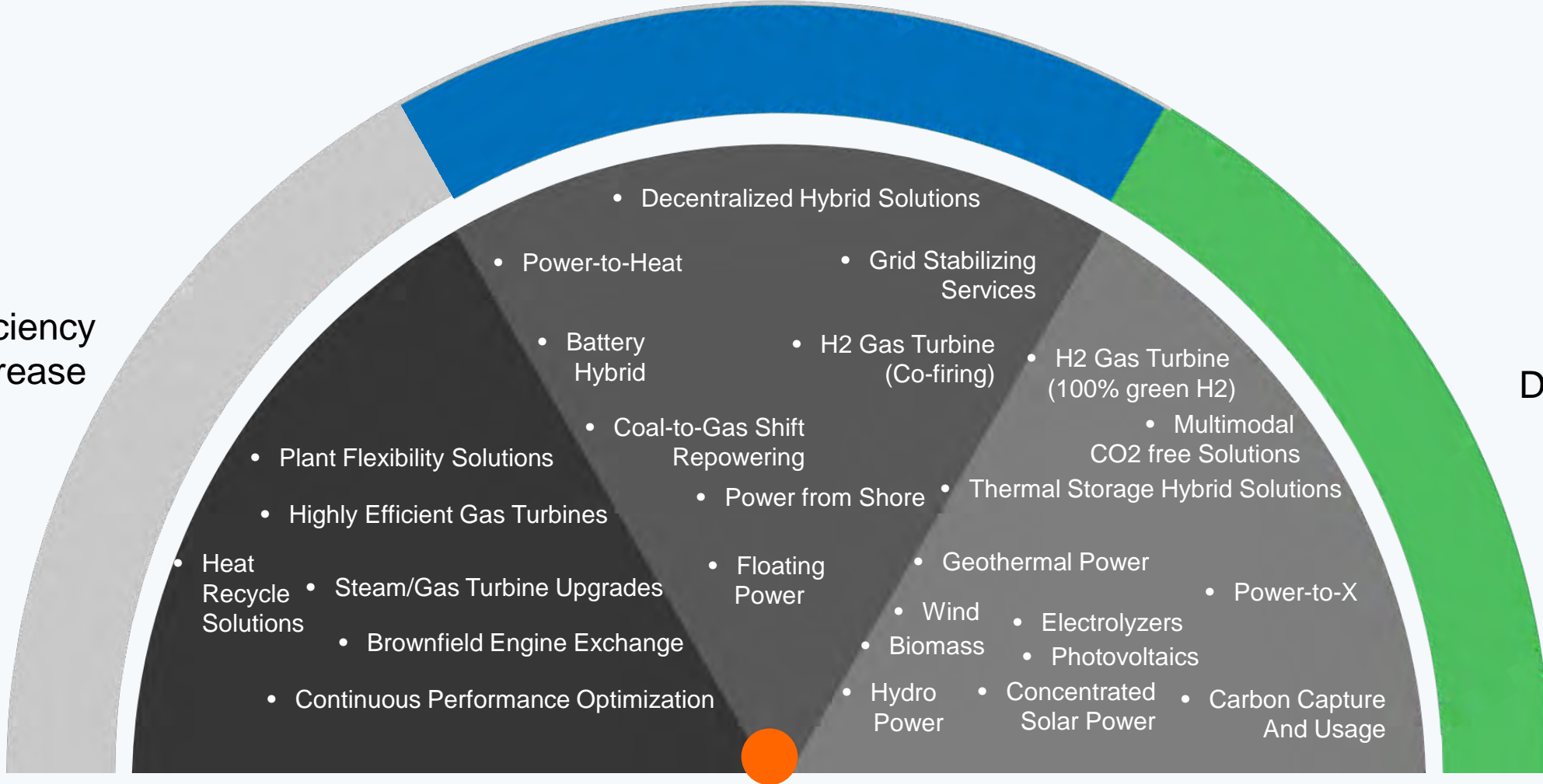
	MARKET GROWTH PROFILE	RELATIVE MARKET SHARE	CAPEX INTENSITY	NWC INTENSITY
Industrial and Public Health and Safety	HIGHER	CHALLENGER	AVERAGE	AVERAGE
Technical Assessment and Advisory	MID-SINGLE	CHALLENGER	LOWER	HIGHER
Environmental Testing	MID-SINGLE	CHALLENGER	AVERAGE	HIGHER
Field Services and inspection	MID-SINGLE	CHALLENGER	LOWER	AVERAGE
Specialty Services	LOWER	CHALLENGER	HIGHER	HIGHER
Public Mandates	LOWER	CHALLENGER	AVERAGE	AVERAGE
Industries & Environment	MID-SINGLE	CHALLENGER	AVERAGE	AVERAGE

Energy Transition Avenues

Fuel shift / Hybridization

Efficiency increase

Deep Decarbonization



- Decentralized Hybrid Solutions
- Power-to-Heat
- Grid Stabilizing Services
- Battery Hybrid
- H2 Gas Turbine (Co-firing)
- H2 Gas Turbine (100% green H2)
- Coal-to-Gas Shift Repowering
- Multimodal CO2 free Solutions
- Plant Flexibility Solutions
- Power from Shore
- Thermal Storage Hybrid Solutions
- Highly Efficient Gas Turbines
- Floating Power
- Geothermal Power
- Heat Recycle Solutions
- Steam/Gas Turbine Upgrades
- Wind
- Electrolyzers
- Brownfield Engine Exchange
- Biomass
- Photovoltaics
- Continuous Performance Optimization
- Hydro Power
- Concentrated Solar Power
- Carbon Capture And Usage
- Power-to-X

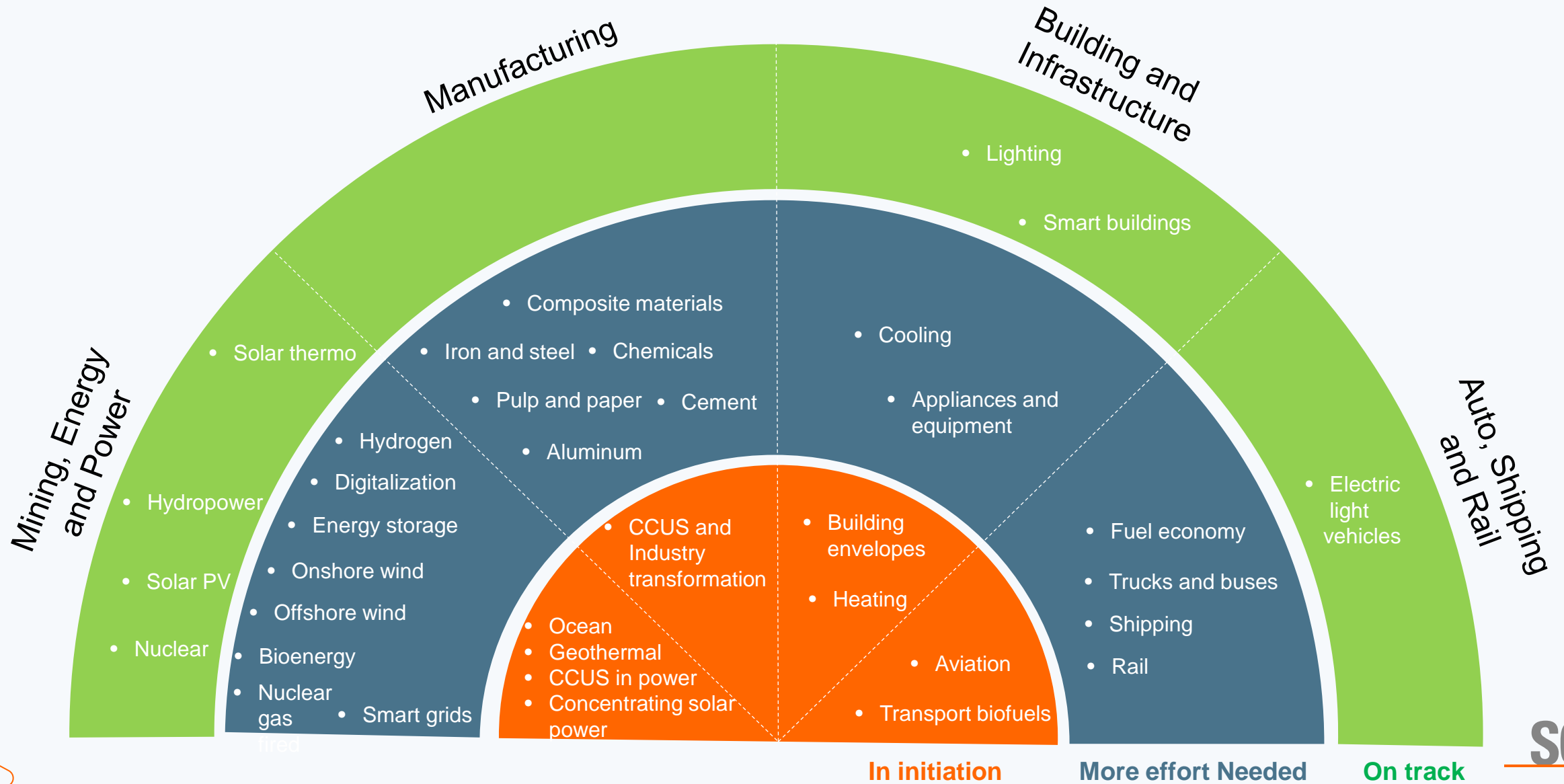
Source: Forbes

Future Energy Systems

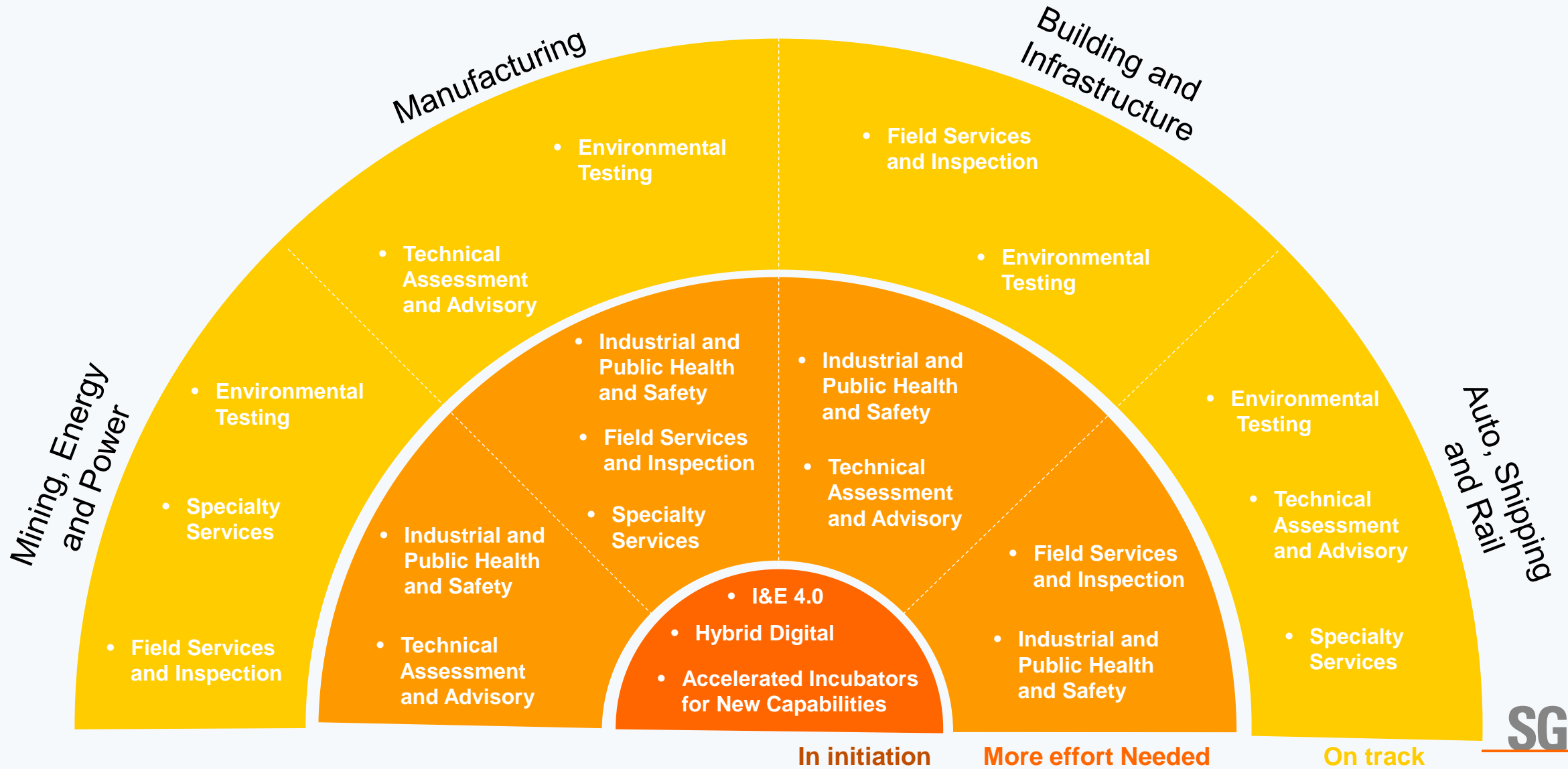
Present Energy Systems

Future Energy Systems

Customer Energy Transition: effort radar



SGS I&E: Collaborative platform



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Questions?