

REPLY LIVING NETWORK

Reply is a Group composed of a network of companies that specialises in consulting, system integration and digital services, with a focus on the conception, design and development of solutions based on new communication channels and digital media.

Reply partners with key industrial groups to define business models, enabled by new technological and communication paradigms such as **Artificial Intelligence (AI)**, **big data**, **cloud computing**, **digital communication** and the **Internet of Things**.

REPLY IS CHARACTERISED BY:

- ▶ a **culture** focused on technological innovation
- ▶ a flexible **structure** capable of anticipating market developments and interpreting new technological drivers
- ▶ a **delivery method** of proven success and scalability
- ▶ a **network** of companies that specialise in specific areas of expertise
- ▶ **teams** composed of specialists recruited from the best universities
- ▶ a **highly experienced** management team
- ▶ continuous **investment** in research and development
- ▶ **long-term relationships** with its customers

REPLY'S ORGANISATIONAL MODEL

With over 9000 employees (as of 31 December 2020),

Reply operates through a network of companies that specialise in processes, applications and technologies and are centres of excellence in their respective fields of expertise.

- ▶ **Processes** – For Reply, the understanding and use of technology leads to the introduction of new enabling factors for business processes, thanks to an in-depth knowledge of both the market and the specific industrial contexts of implementation.
- ▶ **Applications** – Reply designs and implements software solutions intended to satisfy core business needs, in various industrial sectors.
- ▶ **Technologies** – Reply optimises the use of innovative technologies by implementing solutions capable of ensuring maximum efficiency and operational flexibility for its customers.

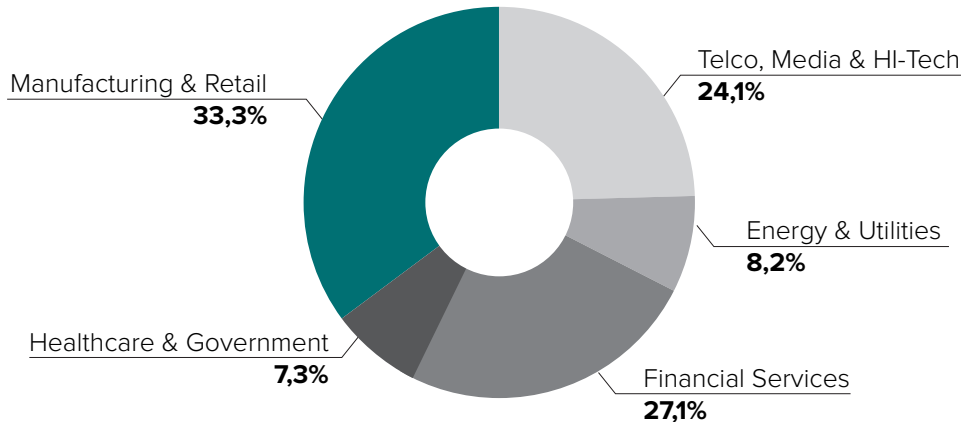
REPLY'S SERVICES INCLUDE:

- ▶ **Consulting** - with a focus on strategy, communication, design, processes and technology
- ▶ **System Integration** - making the best use of the potential of technology, combining business consulting with innovative technological solutions and high added-value
- ▶ **Digital Services** - innovative services based on new communication channels and digital trends

MARKET FOCUS

Reply combines specific sector expertise with extensive experience in the provision of services and a wealth of advanced technological capabilities, in every market segment in which it operates.

In 2020, the breakdown of the Group's sales in its various vertical sectors was as follows:



TELCO & MEDIA AND HI-TECH

The unbundling of networks, the separation between hardware and software, cloud and edge computing are becoming differentiating elements for operators, called upon to offer more flexible proprietary architectures and to promote greater fixed-mobile integration. Networks are becoming increasingly 'fluid' and digitisation is becoming a key element, not only to facilitate the automation of different processes, but also to improve customer experience, help generate new opportunities, reduce costs and adapt to new connectivity needs. The ever-greater diffusion of connected objects also requires a reconfiguration of the entire infrastructure that must transmit, in real time, huge volumes of data. This data is no longer generated by smartphones and other mobile devices alone, but by a myriad of other sources: a pervasive connectivity that goes by the name the 'Internet of Everything'.

Reply is playing an active role in this new era of 'smart connection'. The Group has defined an integrated offer of strategic and technological consulting services to support evolution related to the 5G network and to the design, definition and management of new generation networks. It helps leading players in the sector to implement digital transformation strategies, covering the three main processes that are profoundly transforming today's networks: unbundling, virtualisation and automation. Moreover, Reply supports operators in the management of the new cloud-native RAN architecture, capable of meeting even the challenges related to the creation of multi-vendor networks and offering a wide range of innovative services. These range from business and technology consulting, to the design and implementation of innovative use cases, through the adoption of 'disruptive' technologies such as drones, holograms and small cells.

FINANCIAL SERVICES

The digital world, and more generally the new technologies, are also radically transforming the financial sector. Leading analysts expect the digital financial platforms market will experience enormous growth in the near future. This is partly due to the increase in the number of digital native retail customers, but also as a result of the inevitable technological evolution, increasingly more oriented towards highly scalable cloud platforms.

Reply's key skills enable customers to develop new decision-making models designed to help them analyse risks and optimise internal operational processes based on Robotic Process Automation (RPA) techniques. The diffusion of systems and solutions based on artificial intelligence is another key element of transformation, driven by the explosion of big data and the growing digitalisation of services and processes, both internal and external.

Reply is accompanying the European banking world in this transformation process: it helps financial institutions not only in the definition of multi-channel strategies and the implementation of open banking models, but also in allowing new architectures and new technologies to co-exist with legacy systems and architectures.

Reply operates in the most important European countries, with a consulting division focused on Governance, Risk and Control (GRC), offering solutions that help financial institutions in the implementation of European Banking Union regulations. Reply also boasts a strong presence in the Wealth Management domain, where it has

developed specific solutions for the latest consulting models, including through advanced robo-advisory platforms.

The Group also operates in the mobile payment sector, in the mobile-commerce and e-commerce services realms and in related platforms, offering solutions, services and consultancy for the banking and insurance market, as well as for new, emerging players in the payments ecosystem. This is complemented by Reply's commitment on the innovation front, driven by cutting-edge projects such as those related to quantum computing and blockchain technology.

Reply also supports leading players in the Insurance sector, helping them in the design, execution and governance of major transformation programmes: including the turnaround and optimisation of operating models, thanks to the adoption of Intelligent Process Automation and Machine Learning models and techniques. The requirements imposed by the global Covid-19 pandemic have provided strong momentum to the development of hybrid distribution solutions through the 'remotisation' of relations between the company, intermediaries and customers, together with the design and activation of new, data-driven business models.

MANUFACTURING

Today, digital innovation has inevitably made its way into factories and is revolutionising not only production, but also the entire supply chain, from procurement to logistics, sales and maintenance. Within the Industry 4.0 revolution, production plants are being transformed into open and flexible

ecosystems which can also manage communication flows and the distribution chain better, thus generating a virtuous mechanism capable of minimising costs and maximising results.

Reply collaborates with some of the leading groups in the sector, accompanying them in this complex transformation process that covers a range of different areas including:

- ▶ supply and purchase management
- ▶ the design and implementation of control and planning systems based on the new generation of cloud-based ERP solutions
- ▶ the planning and control of production units
- ▶ the design and definition of logistics supply networks

Moreover, in 2020 Reply enhanced its portfolio of Industry 4.0 and Logistics 4.0 solutions, continuing its 're-platforming' of the proprietary Lea Reply and Brick Reply solutions, focused on the Supply Chain Execution and Manufacturing Execution System, as well as launching Axulus Reply, a new solution aimed at the Industrial Internet of Things, to the market.

In 2020, Reply confirmed its leadership position in the IT solutions sector for logistics in support of the automotive industry, developing integrated projects involving the entire supply chain: from production, thanks to the focus on Industrial Internet of Things and the support of the edge computing technology, to the ability to 'sensorise' production and logistics lines, without ignoring the transport and after-sales distribution activities. This 'holistic' view enables car manufacturers to exploit all the data available within the company, with the aim of monitoring and increasing the efficiency of business processes, as

well as developing new applications both for internal use and for customers.

Electrification, increasingly connected vehicles and autonomous driving: these are the paradigms of the automotive world that are leading the way for a profound transformation, supported by continuous and significant investments.

Within this context, Reply has developed skills and worked on projects related to the introduction of new technologies such as AI applied to the development of autonomous driving and quality assurance (e.g. remote diagnostics, vehicle diagnostic repair), as well as to new types of services integrated with smart cities, such as the intelligent search for available parking spaces.

Moreover, on the connectivity front, Reply collaborates with the leading OEMs in the industry to create commercial versions of V2I (Vehicle to Infrastructure) connectivity platforms. It also studies solutions and service platforms for the connected vehicle, capable of integrating data from onboard systems with distributed network data, in order to calculate the optimal routes between the different charging stations available.

RETAIL

The global Covid-19 pandemic has strongly called into question traditional retail models and has forced a significant acceleration of digitisation processes along the entire distribution chain. Commercial processes and logistics have been heavily affected by the many regulations and limitations imposed by countries around the world in order to contain

the spread of infections. In particular, the closure of physical stores has also meant that goods are piling up in warehouses, calling into question the business continuity of the various sectors. Many businesses – even those who had not yet adopted e-commerce – found themselves forced to review their strategy and to make the conscious decision to accelerate the development and consolidation of new, hybrid sales methods such as Click and Collect – i.e. purchasing online and then picking up in-store.

During this delicate transition phase, Reply has supported numerous retailers operating in diverse product sectors, accompanying them as they expand the number of touchpoints served and introduce new payment systems. Thanks to our data-driven approach, it was not only possible to ensure that the sales methods became more flexible, adapting them to the ever-changing healthcare and regulatory environment, but also to leverage this contingent need, by initiating a series of strategic innovations to accompany the full digitalisation of sales processes. These results were made possible by the optimisation of IT, operational and logistical complexity associated with the different business models, based on a cross-channel approach.

ENERGY & UTILITIES

The future of energy is increasingly more green, and progressive decarbonisation requires an evolution of processes and operating models that only digital technologies are able to support. The entire value chain is affected by this revolution: from production to sales, from consumption monitoring to enabling new interaction models, such as vehicle-to-grid or private micro-grids.

Nearly all major operators launched industrial-scale technological innovation projects in 2020, with the aim of becoming increasingly more flexible and resilient. Among the technologies and platforms available and adaptable in the energy sector, cloud computing is the most widespread solution among operators today, albeit at different levels. The Internet of Things, however, is fast becoming the hub of investments, representing an increasingly key element for enabling the development of monitoring processes, optimising operations and activating new interaction services and models with customers.

In this scenario, Reply is one of the reference partners for the sector, thanks to its knowledge of the market and ability to design, implement and manage innovative digital solutions and technological platforms suitable for the reference market, leveraging, above all, the adoption of cloud and Internet of Things solutions. These are all skills and expertise that Reply has relied on to implement international-scale Internet of Things projects for leading operators in the sector, ranging from energy and demand management to the management of electric car charging, smart metering, smart grid, asset management and renewable generation solutions.

HEALTHCARE & GOVERNMENT

The public sector and healthcare have been the two sectors at the very centre of the social and market changes imposed by the global Covid-19 pandemic and the management of the health emergency. Globally, over the past year many governments have made significant investments in their healthcare sectors to deal with with various aspects of the

pandemic. These include not only operational aspects related to hospitals and the management of Covid-19 patients, but also greater attention to cost optimisation, to the management of medical supplies and of the entire logistics process. In addition, there has been a focus on the digitalisation of a series of processes and solutions, such as contact tracking applications. Among several big projects in this area, Reply has made available to Bavarian healthcare institutions a solution capable of managing information on contacts and the chains of Covid-19 infections.

On the digitalisation front of the healthcare sector, another issue that is acquiring increasing importance during this ongoing pandemic phase is telemedicine, a service whose benefits have never been more apparent at a time when access to treatment is strongly conditioned by restrictive anti-contagion measures. This is, in fact, a pillar of the so-called 'connected care' ecosystem: an integrated approach between the real and virtual realms, thanks to which doctors and healthcare professionals can remotely visit patients, follow their rehabilitation and monitor their vital parameters. Activities such as diagnosis, reporting, payment of care services and observation of therapeutic progress can be carried out through videoconferencing systems, connected to secure and transparent digital health records, also thanks to artificial intelligence systems.

Within this context, Reply has supported healthcare companies and public institutions, on the one hand, in their reaction to the Covid-19 pandemic, and on the other, in the process of digitalisation of care, helping them to evolve their proprietary platforms in order to create solutions based on the Internet

of Things, cloud computing and machine learning systems. Moreover, thanks to partnerships with vendors such as InterSystems, Oracle and Microsoft, Reply has been able to design and implement interoperable and optimised applications in terms of compliance and security.

TECHNOLOGICAL INNOVATION

Technological innovation is the basis of Reply's growth. The company has always pursued the objective of providing its clients with the tools they need to increase flexibility and efficiency. Reply is involved in a continuous process of research, selection and marketing of innovative solutions for sustaining the creation of value within organisations.

ARTIFICIAL INTELLIGENCE

The role of artificial intelligence in business is growing significantly thanks to the wide range of application of algorithms and technologies in different industries. Its use varies from the optimization of business processes thanks to robotization techniques, to its use in customer relations thanks to assistance technologies that combine the ability to recognize natural language and conversational systems.

Machine learning integrates the potential of artificial intelligence, allowing algorithms to improve independently over time. The Reply solutions and platforms based on artificial intelligence and machine learning today serve markets such as healthcare, retail, logistics, financial institutions and telecommunications.

Several partnerships have been signed with the main players and the most innovative startups in areas such as intelligent process automation and computer vision.

In recent years Reply has specialized in the creation of new algorithms and in the comparison between algorithms to identify the most suitable solutions for each use case; in the development of technologies that analyze the results of artificial intelligence and transform them into insights and new services; in the optimization of the databases necessary for the

functioning of the algorithms; in training artificial intelligence and machine learning algorithms.

AUTONOMOUS ROBOT

Advances in Artificial Intelligence, combined with the power of the cloud and the data transmission speed guaranteed by 5G networks, have made it possible to develop new types of fully automated 'objects' such as autonomous vehicles, drones and a new class of increasingly more sophisticated robots. In this new scenario, defined by robotic automation, Reply supports its customers with an end-to-end model that integrates consulting services, software development, artificial intelligence services and the integration of expert systems of Perception, Cognition, Connection, Organisation and Interaction.

Through the application of Swarm Intelligence and Cognitive Computing, robots develop the capacity to operate in unstructured environments such as open spaces on land, water and air, and are increasingly better able to coordinate themselves, even independently of being directly connected to guidance systems. Reply supports companies in the integration of mobile robotics within their operational ecosystems and accompanies them in the development of innovative business models based on intelligent autonomy.

BLOCKCHAIN

Blockchain technology is increasingly emerging as the key technological paradigm for the construction of new digital services based on distributed computational infrastructures. The shared and distributed nature of blockchain digital ledgers is becoming a major element and an opportunity for many sectors, from the financial sector to the supply chain and even the healthcare sector. This extends beyond an 'internal' advantage for a single company or organisation: the system of shared ledgers, on which the blockchain technology is based, facilitates the creation of secure integrations between intercompany systems and connected devices.

Thanks to an offer structured along consulting services, design and the implementation of solutions based on blockchain technology and Distributed Ledger Technology (DLT), Reply supports various customers in the creation of system platforms. In particular, in 2020 Reply developed a healthcare credentials solution leveraging DLT secure distributed processing, to enable the safe return of people to the workplace or to other social contexts, such as cultural events or tourism. Moreover, Reply developed the first solution for digitising the sureties management process based on blockchain technology, with the aim of reducing the number of false sureties and facilitating the sharing of information between ecosystem players (guarantor, warrantee and contractor) and confirming the security of the end-to-end process.

CLOUD COMPUTING

Cloud computing plays a decisive role in all major sectors today. More than ever, IT architectures are designed based on a 'hybrid' approach, one that mixes proprietary systems with a range of different remote Infrastructure-as-a-Service solutions and value-added services provided in Platform-as-a-Service mode. This is complemented by a significant number of applications used in Software-as-a-Service mode, both at the business level and by end consumers.

This scenario necessitates sophisticated orchestration methodologies and tools, to ensure the optimal and secure management of resources, regardless of their location. Moreover, the growing portfolio of edge computing solutions offered by major providers has opened up a number of new possibilities. Today, architectures can provide hybrid solutions, where the computing capacity is distributed between cloud computing and local systems, leading to a significant reduction in processing latency and enabling new use cases. The use of these technologies in connected vehicles is one of the most promising: local sensors collect and process critical information, guaranteeing security and performance, while periodically communicating with cloud systems for more complex processing.

Its longstanding experience, accumulated in sectors such as telco, the automotive industry, finance, utilities and healthcare, combined with its strong cybersecurity expertise, enable Reply to design architectures and solutions that fully exploit the potential of the cloud in areas such as artificial intelligence, machine learning, analytics and quantum

computing. The integration of these services with solutions based on the Internet of Things, facilitated by the adoption of edge and mobile edge components, helps to further consolidate Reply's positioning.

Today, Reply is a dynamic leader in application and infrastructure projects, thanks to partnerships with leading global providers of platforms, application solutions and cloud and edge infrastructure services including Adobe, Amazon, Google, IBM, Microsoft, Oracle, SAP and Salesforce. Moreover, Reply is able to offer a cloud and hybrid infrastructure management service, available 24/7, to support customers, not only in the architectural component, but also at application level.

CUSTOMER ENGAGEMENT

Today's customers are in search of an increasingly less 'mediated' relationship with brands and, at the same time, they are looking for a personalised experience, capable of evolving along with their changing needs and tastes. This is complemented by the need for an omnichannel-driven and real-time approach. A demanding challenge for brands, which find themselves needing to review their strategies and to rethink their communication based on an integrated approach. The roadmap is a data-driven approach that starts from the systematic collection of data relating to the customer, continues with the interpretation and sense-making of this data through the adoption of technologies such as AI and machine learning, and concludes with the implementation of a personalised customer journey, capable of addressing and anticipating the needs of each individual customer. This is an approach possible

only through the synergy between the different Sales, Service and Marketing CRM components and data analysis platforms, as well as thanks to IT architectures and cloud-native microservices focused on customer engagement.

Reply has successfully completed several projects in this domain, implementing, for example, data-driven predictive algorithms capable of influencing the choice of the promotion to be offered. This is thanks to the analysis of navigation paths or the interaction with chatbots, orchestrating the sales, service and marketing components accordingly and thus transforming the contextual data into possible monetisable information.

However, this assumption alone is not enough to strengthen the customer-centric approach: indeed, it is necessary to rethink the tools available to brands, while also taking full advantage of the e-commerce channel, which is becoming more and more of a reference point for consumers, even during their in-store experience. Thanks to this approach, it is possible to ensure a truly integrated, multi-channel experience.

Through its competence centre on customer robotics and partnerships with leading CRM and e-commerce platforms, such as those offered by Microsoft, Oracle, SAP, Adobe and Salesforce, Reply collaborates with major brands, helping them to design increasingly direct and digital relationships with their customers, particularly in light of the acceleration in this direction imposed by the Covid-19 pandemic.

CYBERSECURITY

The issue of Cyber Security is becoming ever more pressing: over the past few years, the trend of cyber attacks has been constantly growing. There has not only been a growing number of malicious actions, but these are becoming increasingly more sophisticated, with a significant impact on the market, creating direct and indirect damage and undermining not only the business but also, in some cases, the reputation of the companies involved. The acceleration towards digital transformation imposed by the global Covid-19 pandemic and the new working methods designed to ensure business continuity for companies, even in full lockdown, have also led to a corresponding increase in cyber threats. Today, more than ever, Cyber Security and Data Protection represent two fundamental and essential pillars for any new digital innovation initiative.

To respond to this growing complexity, Reply has developed an offer capable of protecting the integrity of its customers' data, starting from the definition of the best IT security strategies, up to the identification and implementation of the most suitable technological solutions for mitigating the risk. Through its extensive partnership network, Reply is able to offer in-depth knowledge of the most innovative and popular security technologies on the market and to help customers with the scouting, selection and implementation process of some of the best protection solutions, with specific expertise in the risks associated with cloud services, to Internet of Things platforms and those related to Industry 4.0, AI and automation.

Reply supports companies in all stages of implementation of an integrated protection plan: from the identification of threats and vulnerabilities to the planning, design, implementation and management of appropriate technological, legal, organisational and risk transfer (cyber insurance) countermeasures. Moreover, thanks to its Cyber Security Command Centre, Reply is able to support large organisations through 'predictive' solutions aimed at identifying and managing threats, such as cyber security monitoring, incident management and response and threat intelligence services.

DESIGN CONSULTING

At the core of Reply's design consulting strategy, there is a holistic view that examines all aspects: the analysis of people's needs, strategic business objectives and technological enablers to create a customer journey tailored to the client company.

Reply supports organisations in managing change, helping them to become more agile and receptive and, at the same time, speed up the timing with which new products and services are launched on the market. In 2020, Reply invested heavily in the Design & Innovation Consulting sector, through the acquisition of new differentiating talent and new expertise. It was thus able to further expand its two studios in Milan and Munich and to grow its customer base, composed of established organisations, as well as emerging startups that share a common goal: putting people at the very centre of their growth strategy.

DIGITAL EXPERIENCE

The Covid-19 pandemic has pushed companies to fully rethink their relationships with end customers, but also with employees and business partners. It has also confirmed the need to adapt their offering to meet user expectations, increasingly more focused on customisation, practicality and ease of use.

Reply supports brands in translating these opportunities into new digital experiences and new customer interaction touchpoints, quickly and effectively. This is also thanks to research platforms based on the analysis and interpretation of data and on AI systems, designed to provide answers in real time and identify future trends.

Applications which, for example, utilise video solutions to create direct contact with customers, improve the consulting approach or even just become substitutes for a physical interaction severely limited by the pandemic, have become a central part of the user experience in many cases. Reply's offer fits precisely in this context, as it introduces innovative and scalable platforms that enable, on the one hand, an interaction with the individual user supported by conversational systems based on artificial intelligence, while on the other making it possible to implement new, fully digital solutions that leverage augmented reality features and are capable of handling millions of participants simultaneously.

Reply is thus able to create a widespread experience, thanks to individual applications capable of serving a specific purpose, while at the same time ensuring a consistent and unified user experience

across all channels: from the web to mobile devices, wearables and other touchpoints. This is an approach made possible by a structured 'design to code' management – one which extends from design to implementation.

After aggregating the data to eliminate a compartmentalised approach and having created a unified vision of the customer, Reply is able to work at a cross-channel customisation level. In particular, thanks to predictive analytics systems, Reply can provide automated support for the best actions and content to enhance the user experience, with the aim of creating increasingly closer integration between real life and digital experiences.

Moreover, the key role of the digital experience, including within company environments, confirms the importance of a user experience designed with the individual at the centre, especially for the development of human-machine interfaces designed to carry out specific tasks, as in the case of virtual assistants for the workforce.

DATA-DRIVEN MARKETING

A data-driven marketing approach is able to combine data science with business skills and creativity. With its expertise in this area, Reply helps companies to reduce the emotional component in marketing choices, leaving room for decisions based on data analysis: an approach that makes it possible to minimise non-essential aspects, in favour of a more efficient and effective process.

Reply's proprietary China Beats, Pulse and Sonar platforms are able to transform the collected data

into stories, while its Data Creativity Score is the first data-driven system designed to quantify the level of creativity in a marketing campaign. Moreover, thanks to the application of models based on the principles of behavioural psychology and in comparison with the echo generated by social networks, Reply helps companies to monitor their Digital Brand Equity in real time.

These services, complemented by the proprietary Advanced Analytics system based on automatic and massive data extraction algorithms on social media, take advantage of artificial intelligence and natural language processing. Thanks to this system, Reply is able to offer real-time monitoring of the return on investment for a marketing campaign, thus enabling companies to achieve their goals, while optimising costs.

In 2020, Reply also applied its expertise in data-driven marketing to analyse the effects of the pandemic on the different product sectors and consumer habits.

DIGITAL WORKPLACE

The first response of businesses to the pandemic was, where possible, the remotisation of work and the adoption of digital tools capable of guaranteeing the sharing of information among employees. In many cases, this was an emergency solution rather than the result of a structured planning process. However, this situation has confirmed to companies that there needs to be a change of vision: a new way of conceiving smart working that is focused on people and on the birth of a new Digital Workplace, an ecosystem in which tools and ways of working are

rethought, in order to provide an experience similar to being in the office.

The management of data, projects and operations now requires collaborative, secure and controlled environments, capable of guaranteeing the traceability of activities while, at the same time, enabling collaboration without geographical constraints.

To respond to this scenario and to the growing integration of systems, Reply supports companies through the adoption of the best technologies to manage workflows and remote communication systematically. In 2020, and during the most challenging months of the pandemic in particular, Reply helped companies to reshape or rethink their activities from a Covid perspective, through the adoption of ad hoc tools: from the remote management and training of the sales force, to the organisation of virtual events, all the way to the creation of a shared ecosystem that enabled employees to team up, even remotely. Reply achieved this by leveraging its proprietary solutions like the TamTamy social enterprise platform, which is capable of providing different communication tools in a single space and enabling uninterrupted access to the database and to business applications. In this context, solutions designed to guarantee the safety of workers and companies also played a key role, such as Managed Desktop and Mobile Device Management, which facilitate the protection of company data and devices from unauthorised access.

The various anti-Covid innovations implemented by Reply in 2020 also include tools for the management

of distancing. On the one hand these included a desk sharing solution for offices for the secure management of workstations, and, on the other, a more complex monitoring system for production sites, capable of managing – and possibly alerting – the social distancing of workers based on custom distance and exposure values at the time of interaction, using high-precision, Ultra Wide Band technology.

E-COMMERCE

The global Covid-19 pandemic has put a considerable strain on the retail sector and has accelerated its digitalisation process. In many cases, e-commerce has become the only sales tool and the only channel accessible during the most difficult months of the lockdown. In this context, it was the major e-commerce players who found themselves to be at an advantage compared to the rest of the field, even though many other businesses tried to keep up, supported by ad hoc services and solutions. In sectors such as fashion and luxury, for example, technologies like 3D prototyping and virtual showrooms made it possible to bring customers closer to the shopping experience typically experienced in-store.

Shopping assistants played a key role in this process and facilitated a smoother ‘transition’ between the physical and the digital, thanks to the support of physical persons, available to interact via chat or video chat, and also virtual assistants controlled by AI and machine learning solutions. The B2B segment has also seen an increase in digital transactions.

During this phase of radical transformation, Reply was able to support retailers in the quick adoption of cross-channel sales models. This achievement was also made possible thanks to Reply’s partnership with leading vendors of e-commerce solutions, its expertise in voice interaction and to its consolidated experience in the augmented reality and virtual reality segment.

The digitalisation of sales processes did not only impact the retail sector, but nearly all commercial areas, including sectors such as banking, insurance and telco. Players in these segments pursued several e-commerce projects, taking advantage of new channels such as instant messaging and social networks and using Reply as a strategic partner, thanks to its ability to govern operating models and advanced logistics systems, as well as to manage digital identities without neglecting cybersecurity needs.

ENTERPRISE ARCHITECTURE & AGILE DEVELOPMENT

The Covid-19 pandemic has radically changed the way work is approached, managed and organised. The fact that, under the pressure of the health emergency, companies suddenly found themselves implementing agile and primarily remote models, clearly demonstrates this.

The ability to operate on an international scale based on shared models, leveraging cloud-based architectures and edge computing in particular, have become distinctive elements for businesses that were able to seize this opportunity to bring about a change, particularly where there was already a solid

level of maturity in terms of distributed and agile architectures.

In 2020, Reply accompanied and supported companies in the implementation of distributed, agile and remote operating models, thanks to an offer of architectural frameworks and specific methods and models such as scalable Agile and SecDevOps. Moreover, it carried out several projects in this direction for major industrial, financial and media groups, and for companies operating in the services sector.

GAME STUDIOS

The video game industry was not spared from the impact of the Covid-19 pandemic: like many others, this sector was also hit hard by major changes, yet it managed to adapt quickly to the new scenario. Indeed, the lockdown months led to a significant increase in digital entertainment. The use of video games in domestic environments experienced a strong growth, both on the mobile front and on consoles and PCs.

Reply is engaged in all facets of the gaming domain, both with products in its back-catalogue, and at the same time, working on the development of new titles designed for next generation PCs and consoles, like the latest PlayStation 5 and Xbox Series X/S recently released on the market. In the months and years ahead, the efforts of the sector will focus precisely on these new developments, as it is called upon to innovate constantly in order to satisfy the requirements of an ever-demanding public searching for new content.

INDUSTRY 4.0

Data processing power, latest-generation mechanical automation, as well as machine learning systems and AI: these are the key aspects of the fourth industrial revolution. This is a revolution that is redefining production sites around the world, transforming factories into interconnected systems capable of communicating in real time with the entire supply chain. The new Industry 4.0 models make it possible to manage flows, diversify production, maintain a high level of system reliability and, at the same time, ensure greater efficiency and control.

Reply guides companies in this transformation path: from the new design with virtual reality tools, to the development of solutions capable of connecting production sites and products, all the way to the management of plant and machine maintenance, supported by latest generation tools such as digital twins. Moreover, Reply provides support in the processing of data collected by the interconnected systems, in order to generate information and develop algorithms aimed at automating production, distribution and collaborative processes, in an efficient and effective manner.

On this front, in 2020 Reply continued to grow its portfolio of solutions in the Industry 4.0 and Logistic 4.0 domain, introducing the new Axulus Reply solution to the market. This is designed to facilitate the adoption of solutions in the Industrial Internet realm, by making it possible to integrate new generation Internet of Things components into complex production contexts.

Reply is actively engaged in Industry 4.0 research, having established important partnerships with institutional actors. It is collaborating with the Polytechnic University of Turin on an application in

the Additive Manufacturing domain and, together with the same University, it is a founding partner of CIM 4.0 (Competence Industry Manufacturing 4.0), a competence centre specialised in additive manufacturing and technologies for the digital factory.

Also, with a focus on research, Reply is participating in MADE (multimedia application development environment), the competence centre led by the Polytechnic University of Milan, founded with the aim of disseminating knowledge relating to Industry 4.0 technologies, supporting companies in a path of growth and adoption and facilitating the understanding of how 4.0 solutions can be used to improve industrial competitiveness.

MIXED REALITY

The exponential growth of video content and the increasingly high resolution of such content, the increased computing power of devices, networks' ability to deliver incredibly low latency levels and the evolutions of computer vision machine learning algorithms, have all contributed to changing the paradigms of immersive technologies.

Thanks to mixed reality, it is now possible to pass from a logic of 'experimentation' to a logic of actual adoption of these technologies in various business areas. This is due to the emergence of innovative software solutions such as pixel streaming and the evolution of increasingly compact and powerful viewers.

Reply has already introduced immersive technologies in projects aimed at supporting the

communication and marketing of customer brands, but also as a tool for improving training processes, thanks to the creation of virtual environments where users can experiment and practice in complete safety.

Mixed reality has numerous fields of application, starting from the medical domain. Today, the sector that already demonstrates interesting prospects is the one related to cultural communication and virtual tours, which have already been exploiting the possibilities of virtual reality for some time and are now making them even more immersive using mixed reality.

Reply is also working on solutions that take advantage of mixed reality to support field maintenance operations, with support for both mobile devices and viewers. These solutions make it possible to view a series of Internet of Things data on the intervention area, together with instructions and useful documentation to speed up the technicians' work.

MOBILE & APPS

Over the past few years, the exponential growth in the performance of mobile devices has facilitated the entry into the mobile world of AI systems, capable of enabling a range of different features and advanced services: from object recognition, to the processing of biometric data and augmented reality.

In this context, Reply is committed to supporting companies towards a 'mobile digital transformation', through the adoption of a multi-channel approach and an expanded offer that ranges from User

Experience to Data-Centric Design and Multi-modal Human Machine Interface. This approach allows users to access a series of services enabled by the terminal, but external to it, such as voice assistants, chatbots and infotainment systems in cars, thus creating a 'liquid' mobile experience.

Reply offers its customers a mobile factory capable of not only exploiting the potential of native development, but also of quickly attacking new market segments, leveraging the capabilities of hybrid development. All this, based on a versatile approach that enables the creation of applications natively conceived for smartphones, tablets, wearables, TVs and cars.

CONNECTED PRODUCTS AND PLATFORMS

The Internet of Things is an enabler of connected products and solutions that, combined with technologies such as edge computing and artificial intelligence, make it possible to design and market value-added services, which are gaining in popularity in various fields, from the industrial sphere to public services. During this phase (and also as a result of the global Covid-19 pandemic), sectors such as insurance and healthcare have seen the demand and use of connected platforms and solutions grow, thanks to the ability to monitor behaviour remotely, guaranteeing the privacy of users and, at the same time, reducing risks and improving the offer. When it comes to widespread connectivity, one of the main areas of development is the smart home. Leading vendors are concentrating their efforts on creating and developing large ecosystems capable of offering interesting opportunities for both customers and companies. At the core of the

smart home there are smart speakers and home automation elements, in addition to the application of intelligent sensors to major household appliances. Indeed, sensors enable not only a human-machine interaction, but also greater customisation of use, with a consequent energy optimisation. In this context, Reply supports the design, implementation and evolution of connected products and platforms in various domains: from manufacturing (also thanks to the adoption of Industrial Internet of Things solutions) to insurance, from telco to home automation, all the way to consumer electronics and healthcare. It is precisely in this last domain that Reply concentrated its efforts in 2020, with the aim of ensuring an ever greater integration between proprietary platforms and devices in the field of medicine and wellness.

QUANTUM COMPUTING

Real-time problem solving, the reconfiguration of complex processes and understanding the correlations between seemingly disparate data sets. These are all challenges out of reach from a 'classic' computational point of view, but which today can be supported by accelerated computing and quantum computing through the use of innovative hardware platforms.

The main aim of quantum computing is to perform computationally expensive operations in a very short period of time, thus enabling the acceleration of business performance. Quantum Computing makes it possible to encapsulate information within Quantum Bits (Qubits), taking advantage of the massive parallelisation of quantum algorithms, thus making it possible to solve problems that are typically beyond the reach of traditional technologies. Thanks to this enormous potential, Quantum Computing can

optimise business processes, by maximising the cost/benefit ratio, optimising operations, logistics, workforce management and delivering immediate financial benefits.

Reply has created a competence centre dedicated to Quantum Computing, with the aim of delving deeper into the application of different types of quantum algorithms to areas of interest to customers, competencies that are already being integrated into innovative projects. Indeed, various solutions were developed during 2020 in different domains. These include optimisation of the management of trains and journeys within the transport sector; a solution capable of minimising interference along the entire network for telecommunications; maximising the number of maintenance interventions in the energy sector; and in finance, the implementation of an optimal model for managing costs associated with the performance of transactions on financial markets. These solutions are complemented by the design of Quantum Machine Learning solutions applied to classification algorithms.

In 2020, Reply was declared the winner of an international competition organised by Airbus, a leading company in the aerospace sector. This was achieved thanks to a quantum algorithm to find the optimal arrangement of cargo on an aeroplane, in order to maximise the transported mass. In 2021, Reply will work with Airbus to test their solution in the field.

SOCIAL MEDIA

During the months of lockdown imposed by the pandemic, social media and instant messaging platforms proved to be a key tool for providing socialisation and communication on the one hand, while consolidating its position as a means of

information and entertainment on the other. In the professional domain, social networking and remote communication platforms also reached remarkable levels of use, as a result of the increase in remote work.

Social media platforms have, for some time, seen an increased use by companies to communicate with their audience and to target advertising messages, while attempting to address the growing concerns of user privacy. Over the past few years, digital advertising sales have reached new records, even at the expense of traditional media, and 2020 saw the growth of these channels as tools integrated into the e-commerce experience, particularly in the fashion and hi-tech fields.

In this context, Reply supports large multinationals and companies from different sectors in building an active and responsible social media presence. Interaction on social media is managed as one of several touchpoints and is integrated with secure platforms for data collection and analysis. One of the most interesting consulting areas offered by Reply in this domain is support in the management of marketing automation and in the local presence on social media.

REPLY SERVICES & PLATFORMS

REPLY SERVICES

Today, networks consist of distributed 'information systems' that provide real-time access to an ever-increasing quantity of complex data, information and content. This use of the internet is creating new competitive models, based on approaches to service that depend on three fundamental components: the software platforms involved, the understanding of and expertise in the relevant processes, and the management of the service.

Reply supports its customers in this quest for innovation, with services and platforms that are designed to exploit in full the new potential offered by networks and by communication technologies.

BUSINESS PROCESS OUTSOURCING

Reply provides specialist services in three fields of expertise:

- ▶ **Finance & Administration** – management of transnational accounting processes, preparation of consolidated financial statements, management of tax obligations, dematerialisation of accounting documents and electronic storage
- ▶ **Human resources** – training, ECM, career profiles, company knowledge and dashboards for directional analysis
- ▶ **Pharmaceutical** – management and control of pharmaceutical expenditure

CFO SERVICES

The role of the CFO is changing dramatically, due to the increasing requirements concerning the use of complex reporting and simulation tools that can provide timely and adequate information on the success of a business and its ability to create value. In its business performance management offering, Reply has identified specific services capable of supporting CFOs as their role changes. These changes are increasingly seeing them confront issues that once fell under the responsibility of the CEO, such as:

- ▶ definition of the business control model
- ▶ strategic planning and budgeting
- ▶ creation of the consolidated statement
- ▶ IPO support

APPLICATION MANAGEMENT

Reply has defined an application management model characterised by:

- ▶ a modular approach that allows the customer to purchase either individual service components (for example, only application maintenance or only operational support) or structured portfolios of services
- ▶ a flexible supply model aimed at integrating the Reply service in the best possible way with the customer's business processes, while taking account of the specific requirements involved

REPLY PLATFORMS

AXULUS™

Axulus™ is the solution created by Reply as an accelerator for the Industrial Internet of Things. The platform offers an integrated tool chain which, thanks to a modular approach, enables the identification of possible use cases, configuring the most suitable solutions and implementing them through the adoption of scalable workflows. Axulus™ aims to digitalise the entire process: from the definition of use cases, to the introduction of Industrial Internet of Things solutions to the production environment. Axulus™ is designed as a library of cloud-based tools and is aimed at both industrial companies that use Industrial Internet of Things applications and developers of Industrial Internet of Things solutions.

BRICK REPLY™

Brick Reply™ is Reply's manufacturing operations management platform for industry 4.0, designed to support the evolution of business processes in the manufacturing sector, by taking advantage of the opportunities offered by digital transformation. The platform makes functions and services available, in a mobile context, that enable the configuration and control of the entire production process, or certain parts of it, improving its efficiency and quality level. Indeed, thanks to a fully open microservice architecture and a set of vertical applications, the platform makes it possible to coordinate production activities and connect the machinery and sensors present in the factory, thus enabling the acquisition of

huge amounts of data which, processed by artificial intelligence algorithms, facilitates the predictive management of the shop-floor.

The flexibility of cloud-native technology and the ability to take advantage of as-a-service solutions, also enable the integration of enterprise technologies and applications already present in the factory.

CHINA BEATS

China Beats, co-developed in Berlin and Beijing, is Reply's cloud-based market intelligence and social listening solution, designed to provide access to China's vast data ecosystem. China is becoming the largest consumer market in the world, offering non-Chinese companies many opportunities to drive growth.

China Beats is able to connect to all major Chinese e-commerce platforms, search engines and social media platforms such as Alibaba, Baidu or Sina Weibo, as well as to news and information portals, to patent databases and to accessible legislative databases. It captures relevant data intelligently for the automotive sector, the fashion industry and, starting in 2020, data relating to football. Two additional sectors will be included in 2021: fast-moving consumer goods (FMCG) and technology.

The solution's advanced analytics engine, based on AI, translates large amounts of data into information

that can be easily used by companies to gain a better understanding of the Chinese market and to help them make strategic decisions. Moreover, thanks to Machine Learning and Natural Language Processing algorithms, the system is also capable of understanding slang and the specific context, with the ability to translate the captured information correctly into English.

DISCOVERY REPLY™

Discovery Reply™ is Reply's Enterprise Digital Asset Management platform, designed to securely manage the entire life cycle of digital content such as images, videos, audio and multimedia documents, through guided and controlled flows and offering consistent, quality information on a brand's products and content across all touchpoints. The platform is thus able to simplify business processes related to production and distribution across the various channels:

e-commerce, advertising and communication.

Thanks to AI technologies, it is possible to ensure the advanced management of contents, distributing them based on an omnichannel logic and a multi-brand approach. Images and videos are analysed and edited directly on the platform and subsequently published on websites, e-commerce channels, Web TV platforms, catalogues, digital displays and social media networks, in compliance with the specific usage rights in the various business areas.

HI CONNECT™

HI Connect™ is the Reply solution designed to enable communication between networked objects, based on a simple and standard approach. It enables the development of vertical applications dedicated to specific markets or use cases, such as infomobility, advanced logistics, environmental security,

contactless payments, traceability and remote product diagnostics. In 2020, the platform evolved with the development of assets for the creation of value from customer relationship management channels, based on sophisticated contextual marketing dynamics and support for innovative interaction systems such as voice assistants. HI Connect™ is a software-as-a-service platform, although it also includes vertical solutions delivered as-a-service: RMS (Recipe Management System), a connected recipe management system used in the world of home and professional appliances, VCP (Value Chain Portal), a system designed to transform an asset from product to service and SCS (Self Customer Support), a solution based on Machine Learning systems featuring a chatbot-based interface for the application of call-deviation techniques to support devices in the field.

LEA REPLY™

LEA Reply™ is a digital platform designed to enable efficient, agile and connected supply chains. It offers a suite of microservices covering various business processes including the management of warehousing, inventory, distribution, delivery and store logistics.

LEA Reply™ solutions are highly configurable and customisable: it is possible to add new features or to remove those no longer needed by the user. The platform enables companies to obtain an efficient and strongly connected digital supply chain, according to the driving principles of Industry 4.0: interoperability of systems and people, modularity of solutions, and real-time and decentralised decision-making processes. This is possible through the use of latest generation technologies such as artificial intelligence, robotics, wearables and the Internet

of Things. LEA Reply™ has been included in the Gartner Magic Quadrant for Warehouse Management Systems - WMS (Winning Business Model).

PULSE REPLY

Pulse is Reply's data-driven insight solution that combines data science and marketing intelligence activities within an agile dashboard. The platform is able to respond to business requests based on KPIs updated in real time. It includes advanced visualisation and data modelling features and has been designed to enable users to understand what is happening, but also to enable forecasting.

Pulse Reply is a flexible platform that can be used in any context and integrates easily with any data source, including non-proprietary products and dashboards. Moreover, thanks to the integration of machine learning algorithms, Pulse is able to notify users automatically when changes in a KPI are detected, while also providing evidence of the reasons behind such changes and explaining their potential impact.

SONAR REPLY

Sonar is Reply's solution for research on data-driven trends, developed in collaboration with the German Institute for Artificial Intelligence (DFKI). The platform was designed with the aim of offering a user experience similar to that of common search engines and is intended not only for data analysis professionals, but also for academics and journalists. The central element in Sonar's architecture is an ever-expanding database that today includes over 40 million indexed scientific publications, patents, expert blogs, online news articles and other documents.

Sonar is a data-as-a-service software and its operation is based on environmental scanning methodologies that exploit digital data and text extraction capabilities to add new documents on a daily basis, thus making it possible to optimise analysis trends. The signs and trends discovered can, in fact, be analysed and classified in order to support the identification and anticipation of future trends.

TAMTAMY™

TamTamy™ Reply is the platform designed to help improve and derive value from the interaction between companies, brands and people. In addition to the creation of a digital workplace, the platform also enables users to build learning experience platforms, corporate social media networks and sales force digital communities. By leveraging social media dynamics and specific tools, the platform puts the employee at the centre, while at the same time providing companies with effective tools for sharing information, enabling collaboration between staff, managing digital events and carrying out various training activities.

TamTamy™ provides social media, content editing, digital event management and training functionalities, which can be extended and integrated within specific business contexts to help companies implement new participation and resource sharing models. The platform features a customisable, flexible and responsive front-end that facilitates immediate access from any device and is available both in cloud and on-premise.

TICURO REPLY™

Ticuro Reply™ is Reply's platform designed to enable processes supporting the prevention and continuity

of care, including remotely. It does this according to the Connected Care model for digital healthcare and with a view to the dematerialisation and remotisation of care, aspects that have become a global necessity following the Covid-19 pandemic. Ticuro Reply is a cloud-based platform that relies on the 'Internet of Medical Things' technology and is capable of connecting to medical devices, wearable and environmental sensors. The solution thus enables an enhanced and ongoing remote collaboration between patients, caregivers and healthcare staff, both in the prevention phase and in the more critical phases of treatment and rehabilitation.

X-RAIS REPLY™

X-Rais Reply™ is Reply's AI solution, designed to support radiological diagnosis processes by applying convolutional neural networks. The solution is a Deep Learning platform verticalised on different diagnostic methods and on specific anatomical areas, designed to support medical diagnosis processes through Medical Image Recognition techniques, identifying with high accuracy the areas of the images on which doctors must focus their attention.

PARTNERSHIPS - RESEARCH AND DEVELOPMENT

Reply considers research and continuous innovation to be fundamental assets in supporting its customers as they adopt new technologies.

In order to offer the most appropriate solutions to different business requirements, Reply has established a set of key partnerships with major global vendors. In particular, Reply has achieved top certification levels with regard to leading technologies in the enterprise field, including: Adobe, AWS, Google, Microsoft, Oracle, Salesforce and SAP.

ADOBE

With Adobe technologies, Reply creates ad hoc solutions ranging from digital information management (such as web portals, e-commerce solutions and mobile apps), to digital asset management (with management of the end-to-end life cycle of documents and digital assets) and marketing automation, for the creation, planning, management and optimisation of multi-channel marketing campaigns. In these domains, Reply is able to develop customer-oriented applications that make it possible to optimise the targeting, personalisation and optimisation of content.

Today, Reply is a Gold Partner and an AEM Specialised Partner at Adobe's EMEA level, also thanks to its ability to design and implement digital transformation and multi-channel marketing solutions based on the different products included within the Adobe Experience Platform.

AMAZON WEB SERVICES (AWS)

Reply is one of the leading partners of AWS, the cloud platform on which Amazon relies to carry out numerous projects in both the B2B and B2C fields, offering companies a native infrastructure, along with end-to-end support, ranging from the creation and integration of custom applications and platforms,

to the activation of maintenance and management services based on pay-as-you-go cost models. For the seventh consecutive year in 2020, Amazon Web Services named Reply a 'Premier Consulting Partner', the highest level of partnership attributed only to a select group of partners worldwide. This recognition complements Reply's other certified AWS skills in the fields of Data & Analytics, DevOps, Oracle, Migration, Internet of Things, Industrial Software, SaaS and Machine Learning, in addition to those relating to the Managed Service Program.

GOOGLE

Reply is a Google Premier Partner, the highest level of partnership for the Google Workspace and Google Cloud Platform, and supports its customers along the entire migration journey to the cloud, including the execution, planning, optimisation and support phases. As part of its partnership with Google, Reply has obtained various specialisations, including that of Managed Service Provider, Infrastructure Specialist and Machine Learning Specialist, in recognition of its in-depth understanding and numerous specialisations within these domains.

Reply has also won several Partner Expertise awards in the Data Lake Modernisation, Data Warehouse Modernisation and Conversational Design realms,

confirming the presence of a strong team of experts and the implementation of substantial projects and solutions in these areas.

MICROSOFT

Reply is a certified Microsoft Gold Partner in Brazil, Germany, Italy, the UK and the United States. It offers consulting, systems integration and digital services as part of the Azure portfolio, with the aim of creating a unified cloud platform enabling large-scale implementations and agile, high-performance environments. Indeed, Reply Group companies that work with Azure Professional Services are able to provide optimal management of the cloud lifecycle: from the cloud roadmap, to the data centre migration, all the way to Azure Automation & Operation Management and cloud governance capabilities.

In 2020, Reply successfully completed the audit for the Azure Expert MSP (Managed Service Provider) programme and achieved the advanced specialisation in Adoption and Change Management, complementing the Gold skills in which it is already certified. Reply was also named Partner of the Year by Microsoft in Italy and was added to the elite Inner Circle for Business Applications, reserved for selected partners specialised in this specific set of Microsoft solutions.

ORACLE

In March 2020, Reply was included in the new Modern Oracle Partner Network (OPN) and is the first Oracle Partner to have obtained the 'Service Expertise' recognition for the Oracle ERP Financial Cloud, Oracle HCM Global Human Resources, Oracle Cloud Platform Integration, Oracle Cloud Platform Security, DevOps on Oracle Cloud and Oracle Cloud

Platform Data Management services. Moreover, Reply is one of the very few Oracle Managed Service Partners in the world with a leading European Competence Centre capable of guaranteeing highly specialised expertise in the integration of the entire suite of Oracle Cloud products and, in particular, representing a point of reference for the Infrastructure-as-a-Service (IaaS), Platform-as-a-Service (PaaS) and Software-as-a-Service (SaaS) offer.

Reply has also confirmed its leadership position at the application level, on the Oracle ERP Cloud technology. In 2020 it was recognised as 'Oracle HCM Cloud Partner of the year' for supporting major customers in the implementation of HR projects and having implemented the first project in the automotive sector based on the Oracle Cloud Transportation Management technology, besides having managed several strategic projects based on the Oracle Xstore Marketing Automation suite.

SALESFORCE

Reply is a leader in Salesforce solutions in Europe, with an advanced, multi-cloud technical expertise in various sectors: sales, customer service and marketing with DMP, E-commerce for B2B and B2C, integration through MuleSoft and customer engagement on Salesforce with Heroku. Moreover, Reply specialists work with the various Salesforce extensions for CPQ, Pardot, Email Automation and Einstein AI, as well as being familiar with recently acquired products such as Datorama, Click Soft Field Service, Tableau and Velocity.

Thanks to its long-standing experience in Salesforce, Reply is able to supply various models and starter

kits for different sectors and processes, such as those related to Facility Management, Healthcare and 'Return to Work' in the post-lockdown context.

SAP

Reply develops proprietary solutions and packages based on the SAP technologies. Recognised as a Top Strategic Partner in EMEA for SAP Customer Experience (CX), Reply has expanded its CX portfolio to include the new SAP Upscale solution and became an EMEA partner for Qualtrics, a key solution in the field of Customer and Brand Experience, capable of stimulating creativity by exploiting the most innovative technologies.

Expertise on SAP S/4HANA projects has developed hand in hand with skills in the SAP Platform & Technologies, including AI/ML and the Internet of Things, Procurement and Digital Supply Chain solutions. Today, Reply is successfully pursuing two strategies and making them available on the market: on the one hand, accompanying businesses in the transition to SAP cloud solutions (approximately 90% of Reply's new projects are cloud-based) and on the other hand, leading a process of co-innovation, as is the case, for example, with the SAP Ariba accelerator.

In 2020, Reply received the 'SAP Quality Award' for the seventh consecutive year, in recognition of the quality and relevance of its activities. Reply has also extended its 'SAP Gold Partner' status to the UK, the third market after Italy and Germany to obtain this recognition.

DEVELOPMENT AND EVOLUTION OF PROPRIETARY PLATFORMS

Reply constantly dedicates resources to research and development activities, with a focus on two main areas: the development and evolution of proprietary platforms and the definition of a continuous scouting, selection and learning process of new technologies, aimed at bringing innovative solutions, capable of sustaining the creation of value in companies, onto the market.

BRICK REPLY™

In 2020, the Brick Reply™ platform developed new features that exploit big data and AI, introducing machine learning techniques and simulation models that made it possible to approach the Digital Twin technology, applied to the entire production process. The two Manufacturing Execution and Plant Maintenance platforms were also optimised at the same time. Reply's 2021 enhancements are even more ambitious. On the one hand, on the platform front, Digital Twin services will be consolidated and new business intelligence, natural language processing and digital connectivity technologies included. On the other hand, on the applications and services front, new features will be added in the Manufacturing Execution, Monitoring & Reporting apps and in the Shop-Floor Digital Twin application, while the Production Quality, Advanced Planning & Scheduling and Plant Maintenance applications will be equipped with new features, thus enhancing in their simulation and forecasting capabilities.

DISCOVERY REPLY™

In 2020, the Discovery Reply™ platform developed new solutions and tools to respond to the changing needs of a market strongly affected by the pandemic, and to help companies embrace a new communication paradigm capable of guaranteeing a digital presence of the brand and a level of interaction equivalent to the 'live' one. A new, end-to-end live streaming and video-on-demand model was thus introduced, capable of managing all the

pre, post and 'go live' phases of a virtual event, all with high levels of customisation and interactive opportunities. The live chat functionality and other conversational tools facilitate interaction with the public in real time, while the tracking system on views and interactions enables the constant analysis of performance data associated with communication initiatives, with the aim of optimising the service and, at the same time, the customer experience.

In the Enterprise domain, on the other hand, new integrations with the various business systems (CRM, PLM, CMS and ERP) were created and, thanks to the cloud, it was possible to aggregate and centralise information and increase the volumes of coded and managed content. The goal for 2021 is to enrich the platform, based on the specific needs of the various business areas. Some of the main implementations include the new Headless CMS capabilities, the development of Smart Image Delivery features, the development of Content Intelligence and Content Tracking models, and the automation of sales processes on marketplaces. On the video platform front, however, the implementation will concern new product presentation and video commerce models, in addition to the management of the shopping experience with the collection of insights for user profiling and predictive analysis on interests.

HI CONNECT REPLY™

In 2020, HI Connect Reply™ introduced customer engagement systems designed to orchestrate event-driven communication campaigns, while for 2021

the investments will lead the platform to vertically extend its functional coverage, with the development of three modules focused on supporting specialised use cases relating to four key industries: insurance, telco, utilities and manufacturing.

LEA REPLY™

In 2020, the development of the LEA Reply™ platform focused on extending the already supported supply chain business processes, both by introducing new modules and by enhancing existing ones. One of the most significant new developments is the LEA Reply™ Visibility solution, aimed at the real-time presentation of business information relevant for supporting decision-making processes, through the collection and interpretation of large amounts of data and events from heterogeneous sources. This is complemented by the new LEA Reply™ In-Store Picking module, a tool designed to support the preparation of e-commerce orders directly inside the store via a mobile application. Moreover, the new Smart Planning solution for optimising last mile transport was integrated into the platform to provide support for distribution processes.

The goal for 2021 is to enhance the platform through the introduction of new services designed to support the retail market, in particular the dark store and in-store operational processes that leverage artificial intelligence-based optimisation algorithms to improve supply chain efficiency. This is complemented by experimentation projects on new technologies such as advanced wearables and indoor localisation systems.

TAMTAMY™

In 2020, Reply continued its development of the TamTamy™ version that integrates Microsoft's Office

365 productivity services. This integration will continue in 2021 with particular attention to Teams. Moreover, the 'TamTamy Learning Experience Platform' was also released. This is the new vertical version of the platform and it is entirely dedicated to training, leveraging a new user experience and a new user interface and combining learning logic with social dynamics. Further investments are planned in 2021, with the aim of both positioning TamTamy as an accelerator in the development of custom platforms through headless architecture, and also developing a 'white label' version intended for the sales force in the finance world.

TICURO REPLY™

In 2020 Ticuro Reply™ renewed its 93/42/EEC certification as a 'stand-alone medical device software'. Moreover, it was selected by the Italian Minister for Technological Innovation and Digitisation as one of the top five medical tele-assistance technological solutions.

The modules for the management of the Televisit and Teleconsultation processes were also revamped. These tools facilitate an audio/video connection between the user and the professional (or several professionals), and have the ability to share documents and measurements of vital signs and to perform interactive tests. 2020 also saw the creation of the Internet of Medical Things HUB, a single access point for the automatic connection of medical devices to enable data collection. Finally, Ticuro Reply™ is now integrated with the Apple HealthKit and investments were made to revamp the user experience of the solution in order to improve its usability on mobile devices.

X-RAIS REPLY™

In 2020 X-RAIS Reply™ enhanced its functionality in the mammography analysis domain, thanks to the implementation of specific algorithms capable of detecting the breast density level and describing its morphological characteristics, while at the same time highlighting the lesions present and any microcalcifications and radiopacity of a malignant nature. The goal for 2021 is to expand the analysis capabilities across different diagnostic methods and other anatomical areas. This is complemented by the new specialisation in the thoracic area, with the ability to analyse chest x-ray images, which is of particular benefit in the recent Covid-19 context.

THE VALUE OF PEOPLE

Since its inception, Reply has distinguished itself on the market as a network of professionals recruited from the best universities, whose potential is then matured together, based on strong shared values. Today, this approach has been applied on a global scale.

In 2020, in an international market context marked by strong turbulence, Reply has vigorously pursued its plan for hiring resources with great potential. In each country in which it operates, Reply builds and grows a strong link with the academic world, gaining access to high-potential talent.

The selection criteria for young graduates is strict and concerns both the importance of the university of origin, as well as the distinctive nature of the candidate's curriculum. Together with professionals recruited in emerging markets in particular, they are asked to fully adhere to Reply's value system.

Excellence is the common thread of this system: the search for quality must be a daily and constant commitment, focused on the continuous improvement of one's work and the benefits brought to customers. Each year, a strong, merit-based evaluation system makes it possible to recognise and reward excellent results.

The customer is the protagonist of the Reply value system. Reply consultants take the customer's objectives and make them their own, striving to reach them with a collaborative spirit and with a sense of responsibility and high moral integrity. Each client is individually sent an annual survey to determine the level of satisfaction in relation to each project.

Innovation must be integrated into customers' projects on a daily basis, with a pragmatic approach that combines courage in the choices made and the ability to recognise the most suitable solutions to the context, from an IT point of view and beyond. Internal reward systems make it possible to recognise the most innovative ideas and projects.

Over time, **speed** has proven to be a distinctive feature of Reply's teams on the market. Capitalising on the experiences gained and collaborating with major vendors enables Reply to provide a quick response tailored to its customers' requirements. A strong, shared methodology accelerates design and implementation work.

Teamwork is the glue of Reply's approach. Younger professionals bring the skills gained in their academic career, contributing to teams led by individuals who have followed the same path and whose seniority, leadership and knowledge transfer capabilities have been progressively recognised.

These five value areas are transmitted to 'Replyers' from the moment they join the company. Indeed, each new employee must participate in a training programme, which includes an induction aimed at transmitting the key words that distinguish the Group's work in their daily activities, internally and above all in relation to customers: honesty, reliability, transparency and ethics.

Internal training initiatives aim to transfer knowledge and to identify new market areas, thanks to the in-depth knowledge of the partner offer and the needs of customers in all industrial sectors. The adoption of remote innovative collaboration technologies has made it possible for these activities to be continued in 2020, on an international scale.

The result of the integration of a strong, value-based system and constant attention to recognising the value of expertise and knowledge has always allowed Reply to continue to grow organically, with people as the protagonists of its offer in the technological, consulting and creative fields.