



S&O Capital

Real results. Lasting impact.

HELPING YOUR ORGANISATION SUCCEED WITH PREMIUM PROFESSIONAL SERVICES

We are the go-to partner for regulated industries like financial services, healthcare and pharma, offering hands-on expertise in business growth and operational efficiency.

We work alongside your teams to deliver measurable, high-impact results.

Who we are



Elite Expertise:

S&O Capital is an international firm composed of **senior experts** with decades of combined experience in regulated industries, including financial services and healthcare.



Confidential and Trusted Advisors:

We operate with absolute discretion, acting as **trusted partners to executive teams** who rely on our guidance to execute critical business transformations.

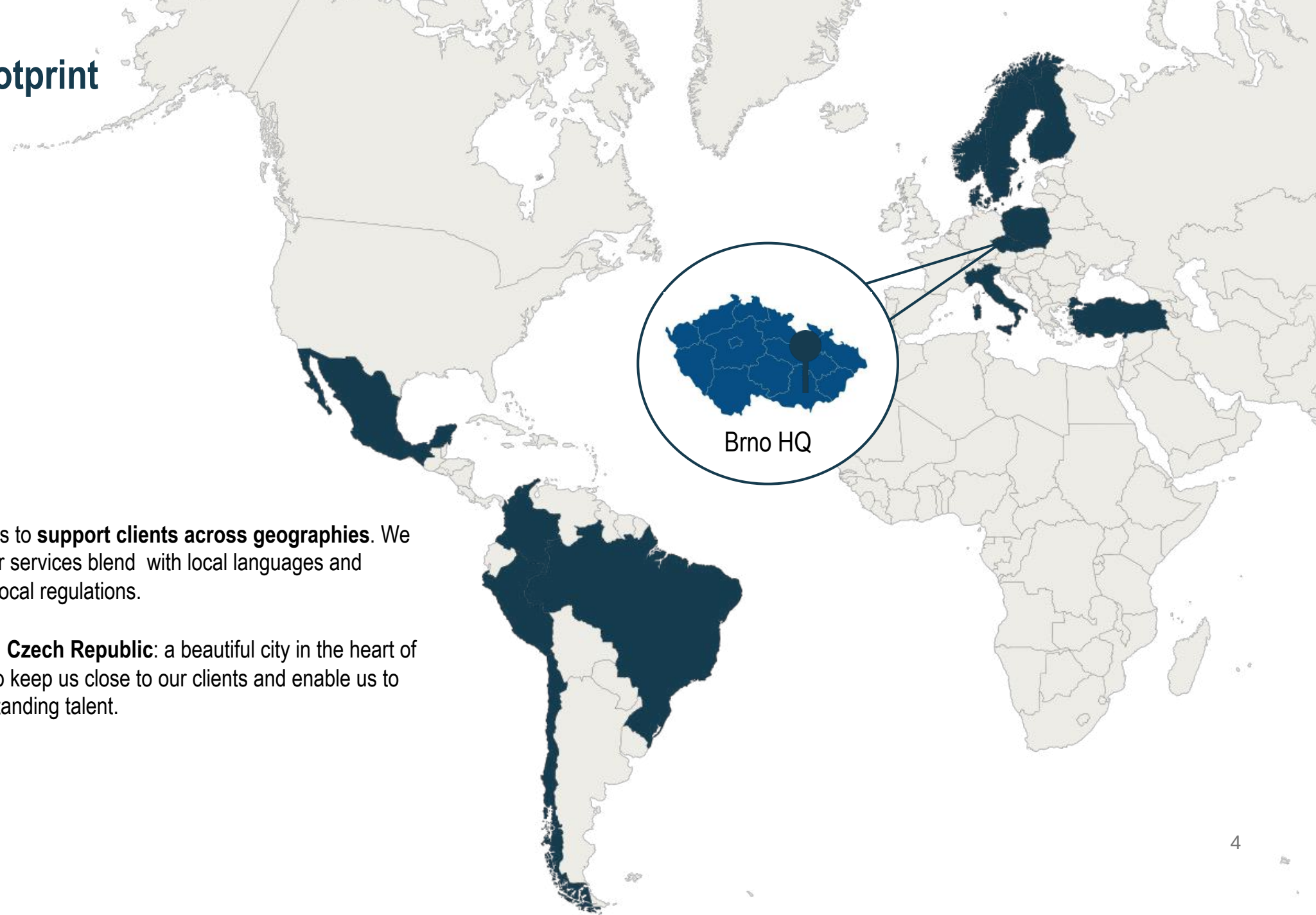


Hands-on Approach:

We collaborate directly with your teams, ensuring that strategies are not only formulated but also **executed seamlessly**, driving real, **tangible outcomes**.



Geographical footprint



Our distributed model allows us to **support clients across geographies**. We take special care to ensure our services blend with local languages and cultures while complying with local regulations.

Our headquarters are in **Brno, Czech Republic**: a beautiful city in the heart of Europe, strategically located to keep us close to our clients and enable us to strengthen our team with outstanding talent.

**“Integrity, commitment,
impact. Our values are not
hanging on the wall, but
applied in everything we
do as a team.”**

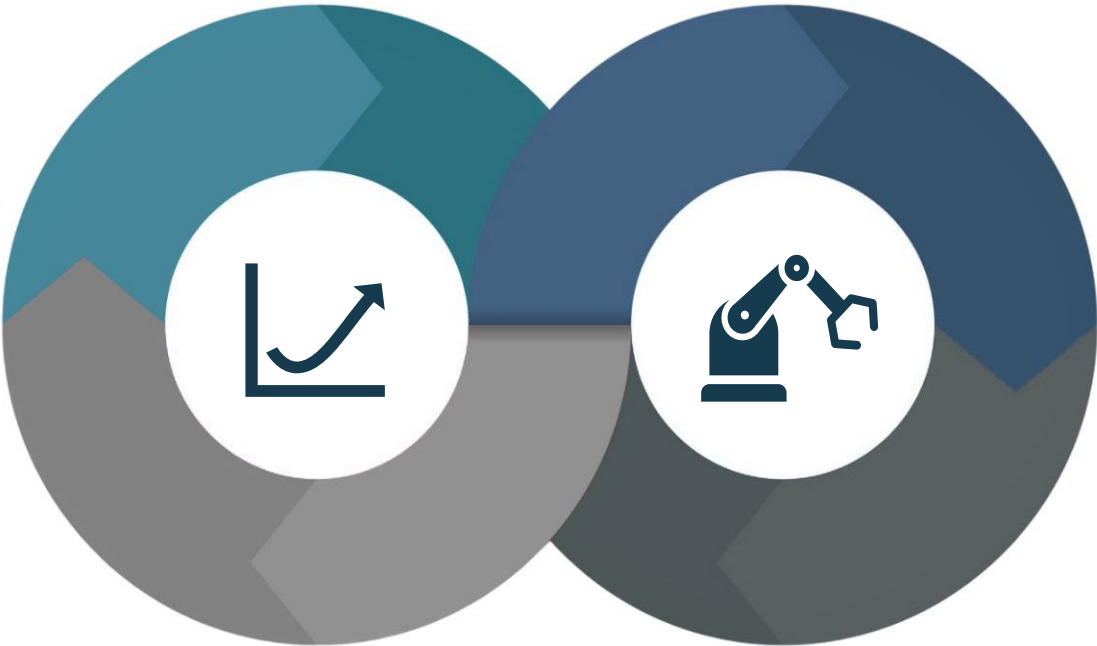
Alessio Colantonio
Chief Executive Officer



The value we bring

REVENUE GROWTH

We don't just plan; **we execute**. From defining market entry strategies across EMEA to directly securing new business partnerships, **we deliver increased revenues** and tangible results.



OPERATIONAL EFFICIENCY

By reengineering processes and coaching your teams in Project Delivery and ITSM practices, we improve workflows and reduce operational bottlenecks, **reducing time waste and resource consumption**.

Pan-European Network

Regulated Industry Expertise

Digital Mastery

Risk Management Expertise



THE CHALLENGES WE HELP YOU SOLVE

Revenue Stagnation,
Operational Inefficiencies,
Technological Debt,
High Compliance Costs.

S&O Capital will tailor a custom solution for your organisation.

“Long-term growth requires both strategic vision and operational discipline.”

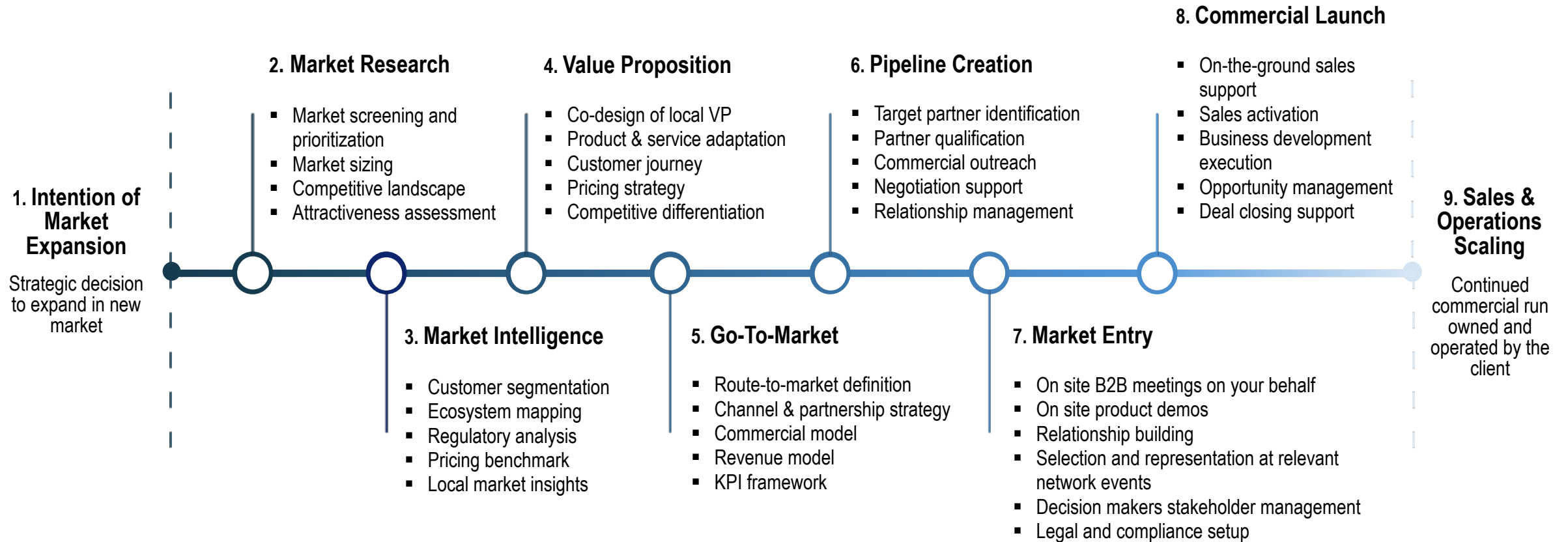
Sustainable business performance depends on the ability to align strategic priorities with efficient operations, measurable execution, and continuous adaptation to evolving business needs. Our operational background allows us to bring a pragmatic, hands-on approach focused on execution, efficiency, and tangible results.

Lina Torres Hernandez
Business Transformation Associate



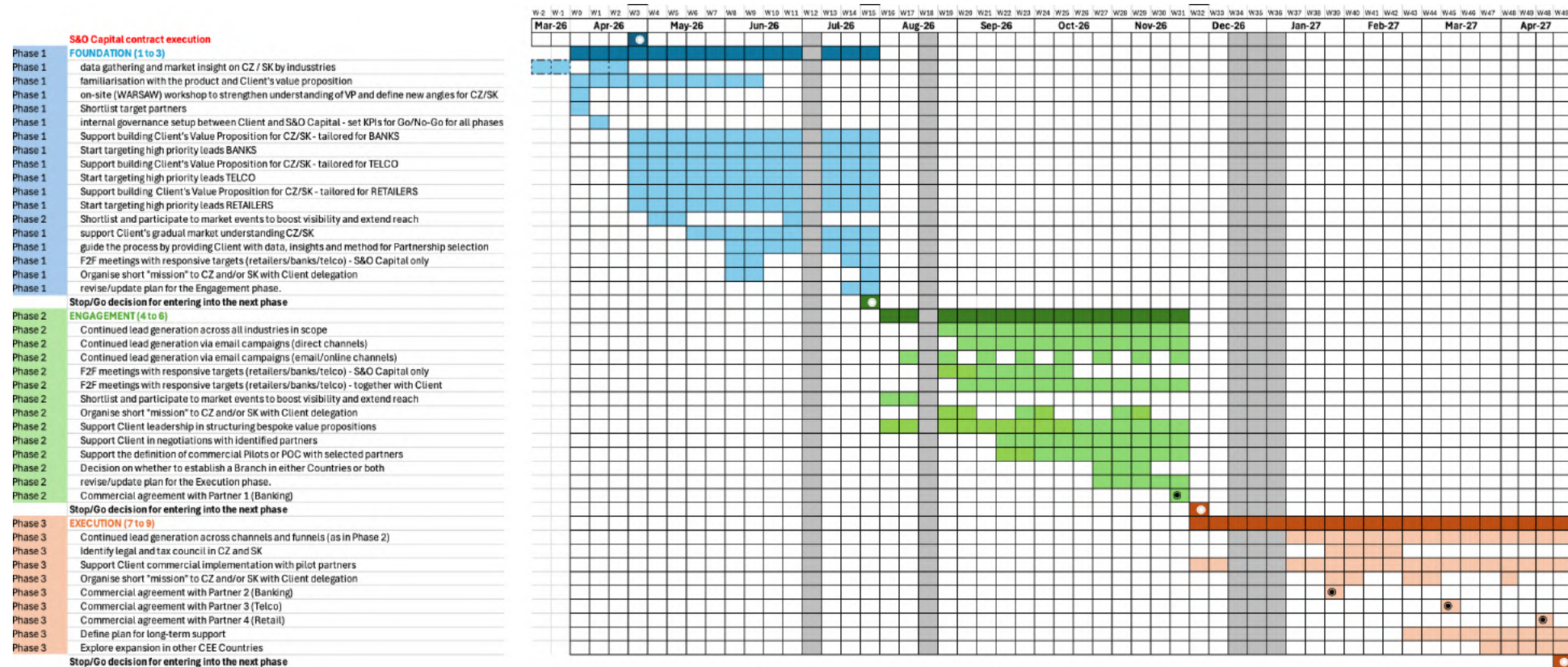
Revenue growth: our delivery model for market expansion

We offer a comprehensive, end-to-end programme that supports clients from the initial decision to expand into a new market through to launch and post-launch execution. Our **local teams** combine **established networks**, **market knowledge** and **cultural understanding** to deliver effectively on your behalf.



Revenue growth: our delivery model for market expansion

Our G2M service is structured as a phased delivery programme, with **measurable objectives** and a formal **Go/No-Go decision** at the end of each phase. This allows progress to be assessed objectively and the plan to be continued, adjusted or stopped as required. S&O Capital can support **every aspect** of a new market entry, from regulatory requirements to logistics, operations and commercial execution. Our commercial milestones are directly linked to the successful achievement of each phase's business objectives.



“First we test if it should exist, then we make it better.”

We do not pursue operational improvement for its own sake. Instead, we challenge the status quo where it matters most, using decades of delivery experience to uncover the real business need and implement targeted changes that deliver the greatest efficiency gains.

Paolo Lamperti

Vice President – Global Delivery



Operational efficiency: A few examples of the value we bring to our clients



In partnership with S&O Capital, **Generali** set out to improve **Project Management efficiency** across 8 countries in CEE: a delivery portfolio of hundreds of M€ in size. The engagement also targeted specific improvement in **governance effectiveness**, as well as a **measurable increase in portfolio delivery**.

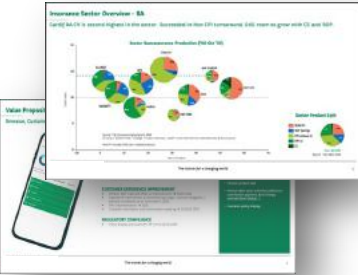


The screenshot shows a dashboard titled '2026 PROJECT PORTFOLIO IMPROVEMENT' with various charts and data points, including a 'CEE Project OPS Dashboard V2'.

OPEX reduction achieved through Project Portfolio delivery optimisation



Serving approximately 80 million customers globally, **BNP Paribas Cardif** is a global leader in **insurance and personal protection**. With around 9,000 employees and generating over €36 billion in annual premium income, the company engaged S&O Capital to support their **strategy definition, execution and implementation**. Specifically, their NORDICS region commissioned specific support in the context of their **2025/2030 growth strategy**.

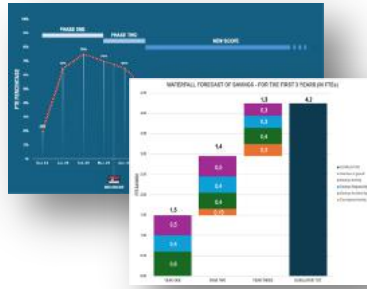


The screenshot shows a dashboard with various charts and data points, including a 'Value Proposition Canvas' and a 'Strategic Roadmap'.

Strategy and Value Proposition definition



Transporting over 100 million passengers annually, the **Lufthansa Group** is one of the largest players in aviation and transportation. With more than 115,000 employees and annual revenues exceeding €37 billion, the Group engaged S&O Capital to deliver a specific **OPEX efficiency target**: a goal we successfully achieved by optimising the ITSM processes of their international contact centre, Lufthansa InTouch.



The screenshot shows a dashboard with various charts and data points, including a 'Process Flow' chart and a 'Forecast of Savings' chart.

OPEX Reduction achieved through contact centre optimisation



With over 50,000 employees worldwide and revenues exceeding €10 billion, the **Atlas Copco Group** is a global leader in Industrial Technology, with a strong European presence and a captive centre for F&A, R&D, and Technology located in the Czech Republic. They sought S&O Capital's expertise to **streamline processes** and **enhance project execution**.

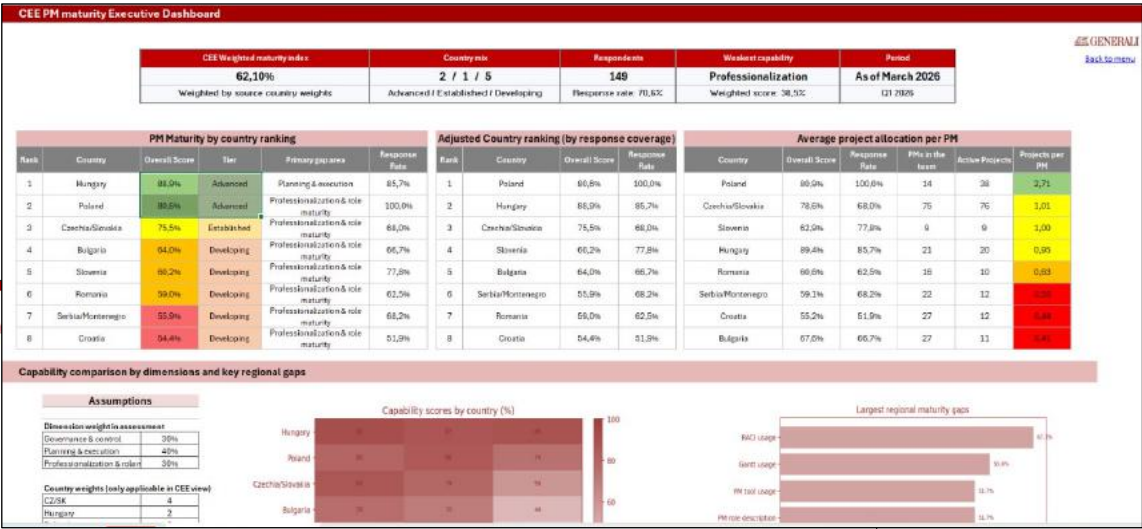


The screenshot shows a dashboard with various charts and data points, including a 'Client Satisfaction Score' chart and a 'Forecast of Savings' chart.

OPEX reduction achieved through Project Portfolio delivery optimisation

Generali CEE: 20% improvement on project delivery portfolio across 8 countries

With over 150 years of history, a presence in more than 50 countries, and a customer base exceeding 70 million, **Generali** are one of the world's leading insurance groups. In partnership with S&O Capital, Generali set out to improve **Project Management efficiency by 20% across 8 countries in CEE: a delivery portfolio of hundreds of M€ in size**. The engagement also targeted a 20% improvement in Governance effectiveness and reducing ad hoc escalations, exceptions, and out of process decisions, as well as a 10% increase in Portfolio delivery predictability through increased adherence to budget and timelines.



Insights & Actionables						
Dimension Assessed	Score Zone	Key Finding	Priority Gap	Quick Win	Target Date Quick win	Target Date Actionables
Governance & Structure	Low-Medium	Governance exists on paper. Standards are defined but not enforced across countries. No formal accountability at portfolio level.	Formalised governance framework + role self Regional vs. Local	Target Operating Model source and learning	May 2026	Correction of governance options with required cadence (monthly and quarterly)
Portfolio & Strategic Alignment	Low	No cross-country prioritisation process. No prioritisation between projects and strategic objectives.	Regular portfolio coordination + regular checks	US implementation and use through heavy projects to understand current portfolio health and anticipate risks	Apr - May 2026	Execution of governance options with required cadence (monthly and quarterly)
Performance & Reporting	Low-Medium	Reporting exists but is activity-based, not outcome-based. No full performance consolidated view. Status updates collected manually each quarter.	Single reporting workspace + RACI framework (personals, not tasks)	- Dashboard for Governance and Performance live based on project portfolio review	May 2026	Unified and single source of truth that enables end-to-end project information monitor and tracking. Note: Currently out of RACI scope but solution can be developed
Value Measurement	Very Low	Post-implementation measurement is virtually absent. No benefits realization tracking. RACI not at project not measured.	RACI framework + benefits realization KPIs	KPIs inclusion and project suggestions to standardized templates	May 2026	Develop tool and methodology for guarantee a correct benefits quantification
RACI & Role Clarity	Low	Accountabilities between PMs, PMOs, line managers and PMs are unclear in overlapping.	Written role descriptions + reinforced RACI matrix	RACI inclusion to standardized templates, training	May 2026	
Tooling & Templates	Low-Medium	3P+ different templates in use across countries. No global standardization.	Unified template library + single data	Standardised templates for all countries with clear source that	May 2026	Provision single source of truth, Content and template standardization. 75% to Generali worldwide

Lufthansa Group Testimonial: 1.2 M€ savings in 7 months

Transporting over 100 million passengers annually, the **Lufthansa Group** is one of the largest players in aviation and transportation. With more than 115,000 employees and annual revenues exceeding €37 billion, the Group engaged S&O Capital to deliver a specific **OPEX efficiency target**: a goal we successfully achieved by optimising the ITSM processes of their international contact centre, Lufthansa InTouch.







Client Testimonial:



Lufthansa

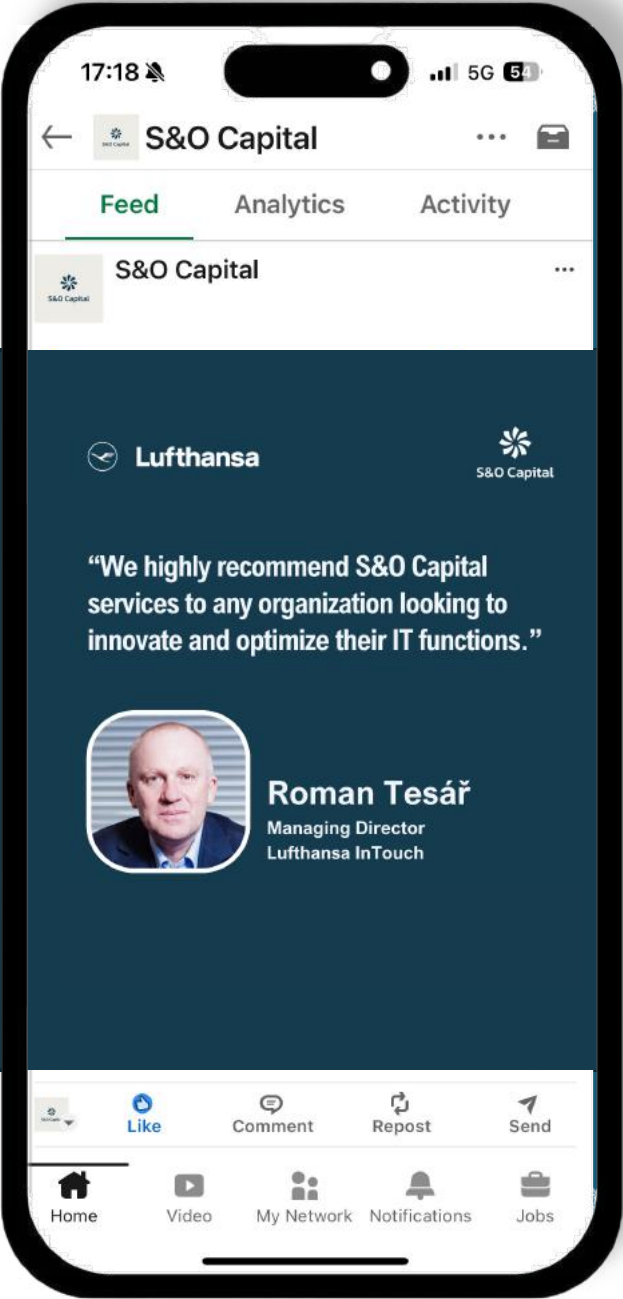
Efficient OPEX reduction

Working with S&O Capital has been a **game-changer** for our IT Service Management. Their team of **senior experts** enabled us to adopt a more data-driven approach, leading to **significant efficiency gains** in our back office. Despite a limited timeframe, they ensured no disruption to our existing operations and applied a results-driven delivery model, easily replicable across locations.

A data-driven approach

A key differentiating factor has been S&O Capital's ability to **approach our operational challenge from a business point of view**, using a data-driven approach to plan and execute with us an enhancement program that, in addition to operational benefits, has **increased the maturity of our internal team**.

S&O Capital developed data-driven solutions that enhanced an already mature ITSM practice, driving **new levels of efficiency**, enabling **real-time access to business insights**, and creating room in the company's OPEX to **unlock growth**.



Lufthansa Group Testimonial: overdelivering in OPEX optimisation

The Lufthansa Group tasked S&O Capital to deliver 4 FTEs savings to their large operation centre in the Czech Republic. The Group has recently acquired ITA (formerly Alitalia), the flagship carrier in Italy, and the centre in Czech Republic needed to create sufficient space in their OPEX to absorb new volumes.

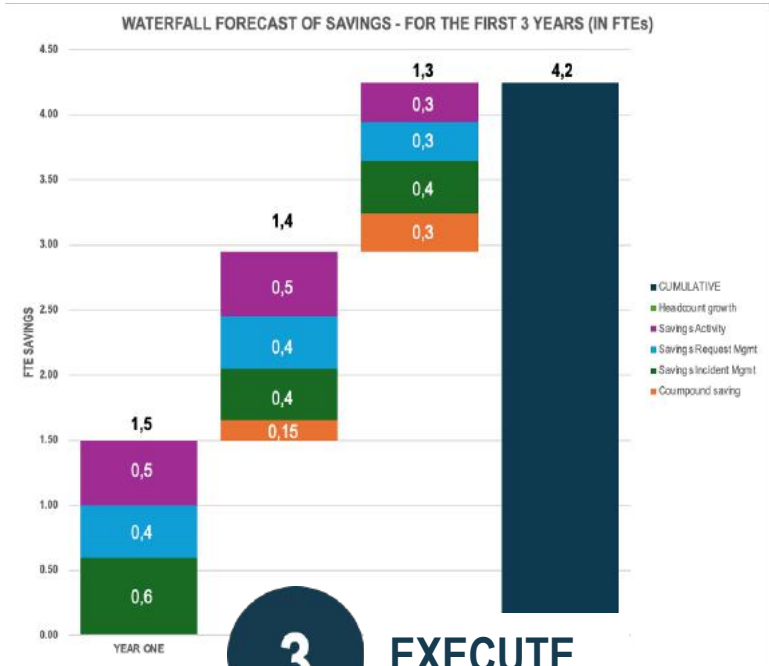
Applying S&O Capital's methodology, we were able to quickly identify the areas for intervention, define a specific intervention plan and execute it. **The targeted OPEX reduction was of 1 MI. EUR in hard savings, to be realised within the same fiscal year. We exceeded targets delivering 1,2 MI. EUR.**



1 ANALYSE



2 PLAN



3 EXECUTE

BNP Paribas Cardif Testimonial: concrete strategic advisory

Serving approximately 80 million customers globally, **BNP Paribas Cardif** is a global leader in insurance and personal protection. With around 9,000 employees and generating over €36 billion in annual premium income, the company engaged S&O Capital to support their strategy definition, execution and implementation. Specifically, their NORDICS region commissioned specific support in the context of their 2025/2030 growth strategy.







Client testimonial:

BNP Paribas Cardif Nordic

Clarity in communication

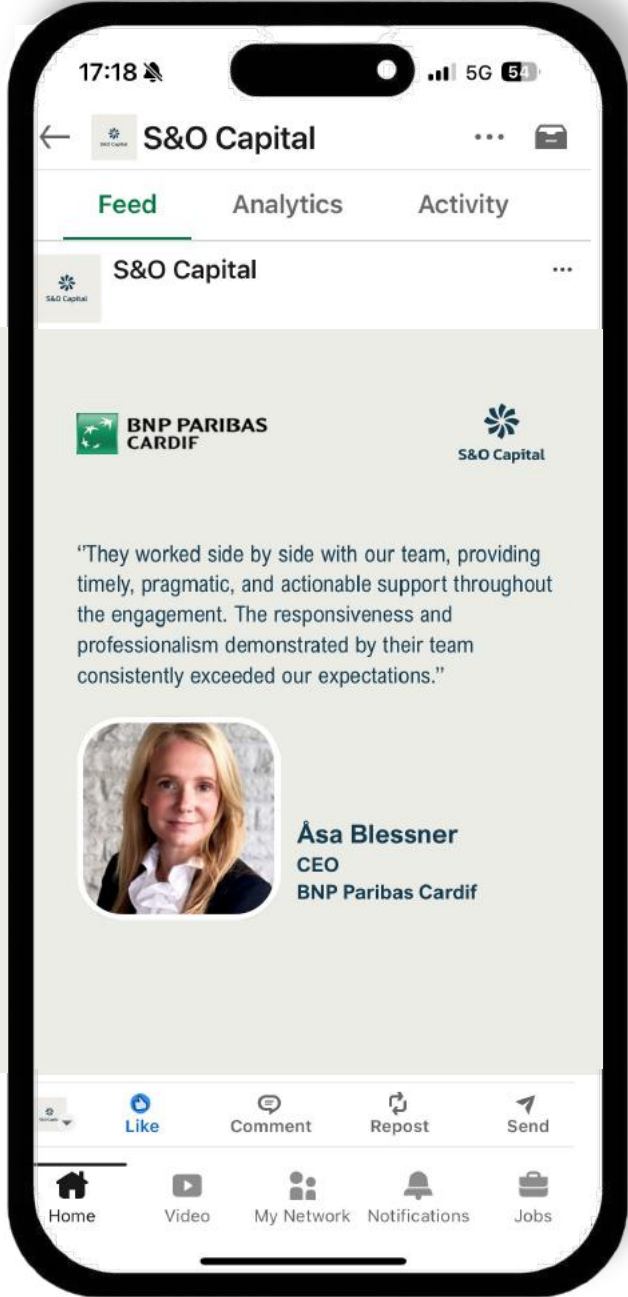
Earlier this year, we engaged S&O Capital to support us in **sharpening our business strategy**, with a specific focus on investor relations. Their team played a key role in helping us **bring clarity** to our mission and develop a set of messages that communicate our value and direction effectively to shareholders and stakeholders.

Delivery oriented

What set S&O Capital apart was not just the quality of their strategic input, but their **highly delivery-oriented approach**.

We are very pleased with the results of this collaboration and look forward to continuing our partnership with S&O Capital in the future.

S&O Capital was engaged through our transparent **retainer model**, which allowed BNP Paribas Cardif Nordics to secure flexible support as they navigated an ever-changing scope and shifting priorities.



Value Proposition reshape for Cardif LATAM

A structured, multi-dimensional assessment of 30+ must-have services and new initiatives across 5 LATAM countries (Brazil, Chile, Colombia, Mexico and Peru), to establish a fact-based starting point for LATAM transformation and to co-create and deliver future-proof services.

01 MATURITY

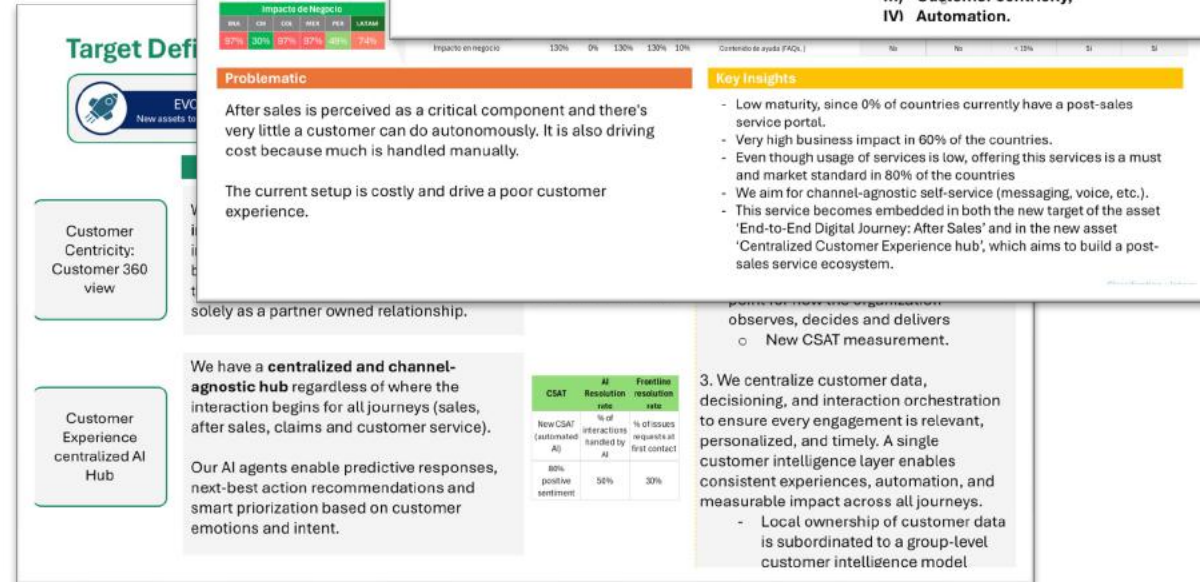
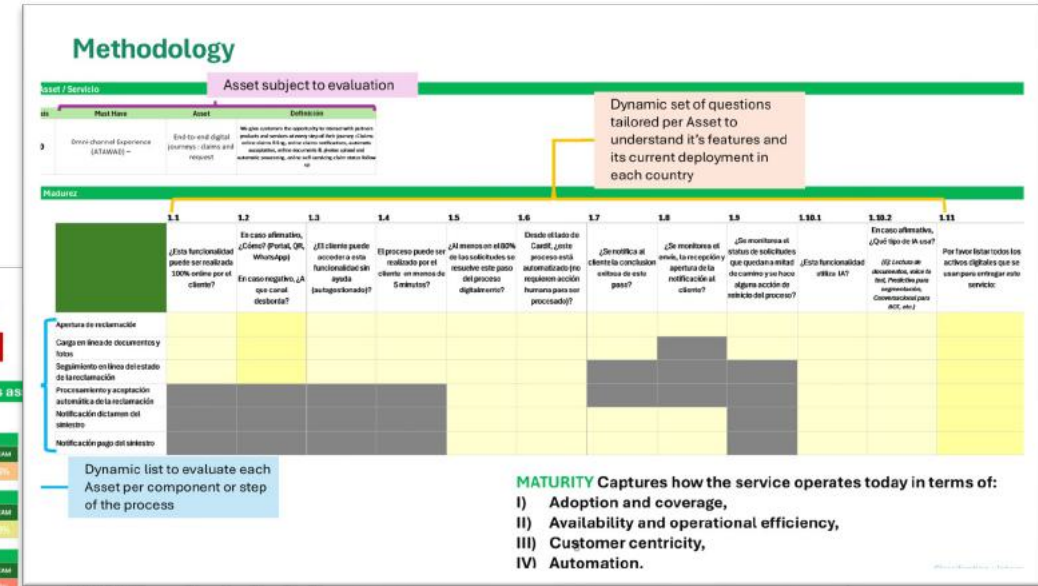
Assess the level of maturity thanks to new, simpler KPIs.

02 BIZ IMPACT

Determine what is the business impact of any given asset in a specific Country.

03 COST

What is the total cost required to sustain or develop the asset further,



Atlas Copco Testimonial: doubling productivity of the PMO dept.

With over 50,000 employees worldwide and revenues exceeding €10 billion, the **Atlas Copco Group** is a global leader in Industrial Technology, with a strong European presence and a captive centre for F&A, R&D, and Technology located in the Czech Republic. They sought S&O Capital's expertise to **streamline processes** and **enhance project execution**.

Atlas Copco Group

S&O Capital

Atlas Copco Group

S&O Capital

Atlas Copco Group

S&O Capital

Client Testimonial: Atlas Copco Group

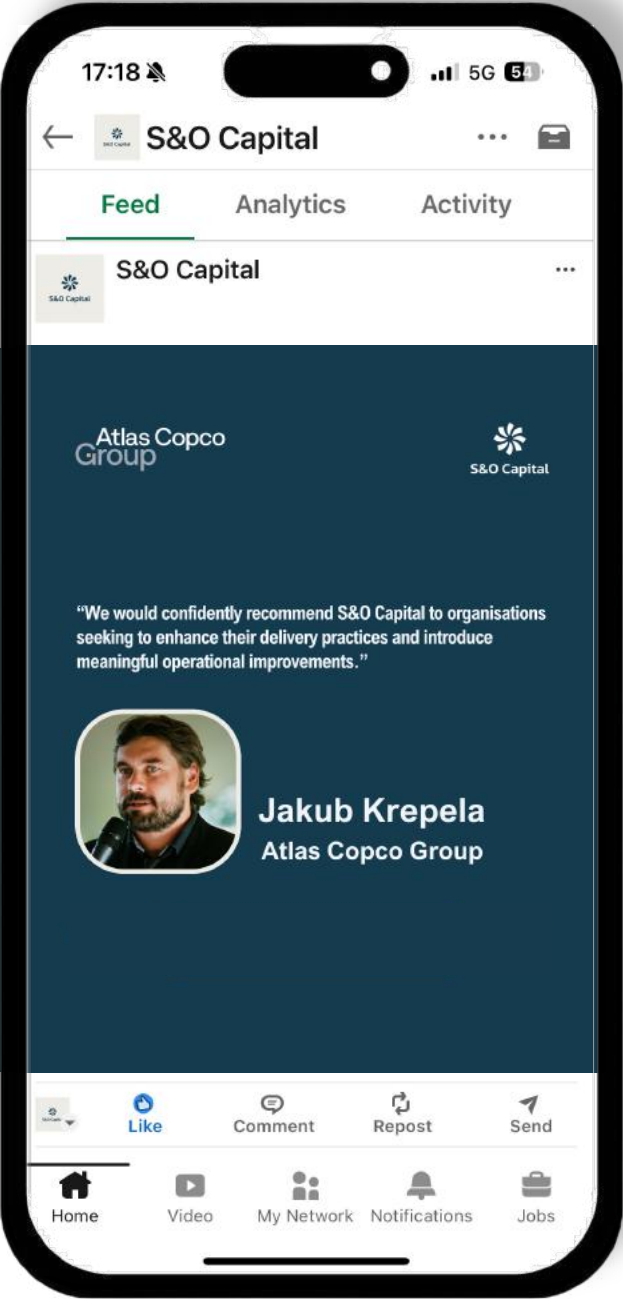
Tailored to specific needs

"We were very pleased with the work delivered by **S&O Capital**. Their approach was practical, well-structured, and **specifically tailored** to address the needs of our organisation. The team **took the time to understand** our challenges, providing tools and techniques that are directly applicable to our work."

Tangible & concrete

"The pre-workshop period spent with S&O Capital representatives proved **invaluable** in identifying areas for improvement. The **delivery was engaging** and focused on providing **real-world solutions**, which our team found both relevant and valuable."

S&O Capital led the initiative, delivering **tailored, tangible solutions** that significantly improved outcomes, earning high praise from the client.





ENABLE YOUR TEAMS TO DO MORE WITH LESS +8,5M€

With S&O Capital's support, Atlas Copco's Project Management Organization significantly improved their project delivery capabilities, increasing project portfolio value by **€8,47 million YoY*** through enhanced staff competencies, streamlined processes, and our hands-on execution.

* Increase measured on the cumulative value of ongoing projects within the Company's portfolio, with less than 5% variation on team size.

CLIENT SATISFACTION SCORE 96%

“Tailored to our needs.”

“[...] real action points to improve digital delivery”

“[...] activity was aimed specifically at our company”

“Remarkable technical expertise, coupled with concrete and actionable advice.”

“Technological innovation is not the goal, but a means to improving business performance.”

Whether tackling legacy, reducing complexity, or driving innovation, we see technology as a means to an end. Enhanced business performance remains both the driver and the key measure of our specialised delivery.

Massimiliano Orefice
Global Head of Technology

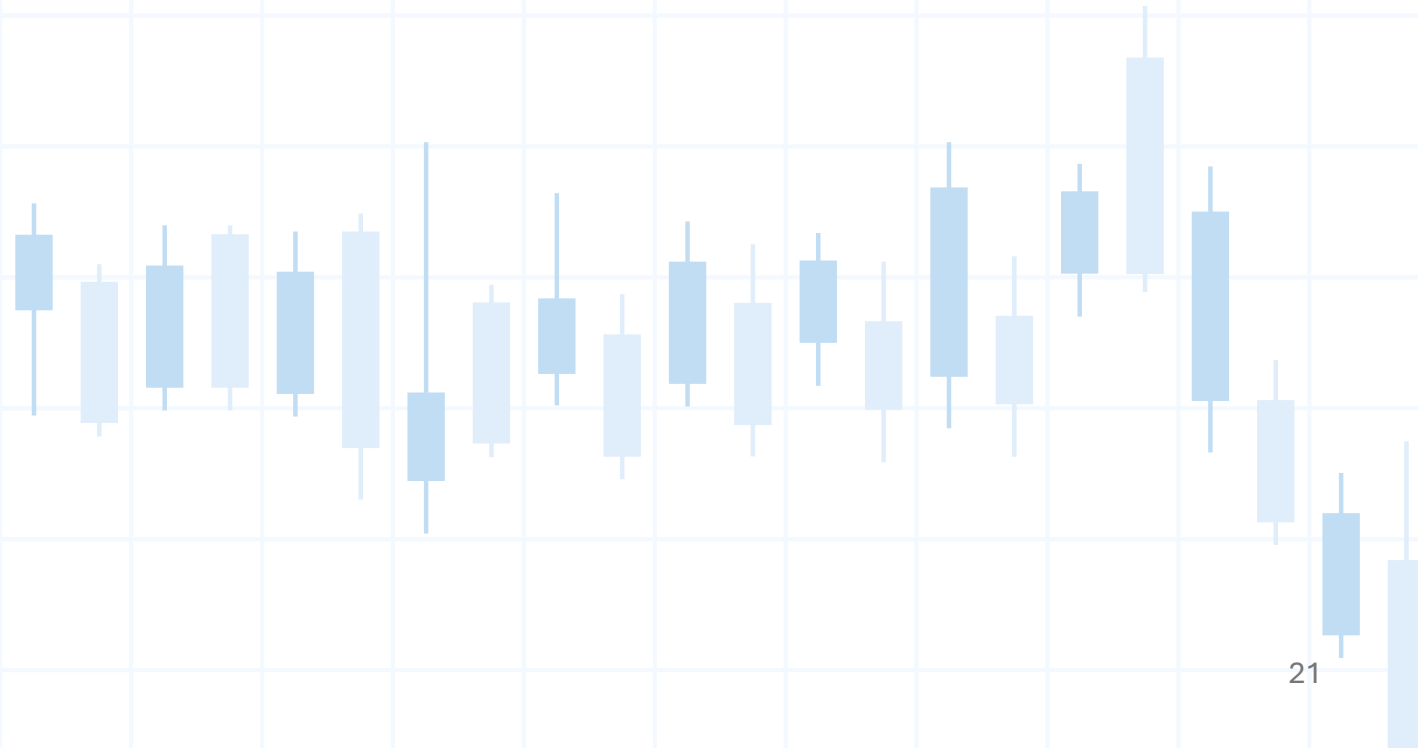


We stand behind our commitments

**Our commercials
are tied to your
success and
concrete project
milestones.**

Guided by our values, we have adopted a model that shares responsibility
and reduces risk for our clients.

Our fees are linked directly to delivery effectiveness and the value created,
ensuring full transparency, guaranteed outcomes,
and alignment with our clients' priorities.



**“Quality is never a coincidence;
it is the deliberate outcome of
intelligent design, disciplined
execution, and a relentless
pursuit of improvement.”**

We don't leave excellence to chance. Every framework we design and every infrastructure we refine begins with a disciplined evaluation of purpose, compliance, and value creation. Through structured governance and targeted execution, we transform complexity into clarity, ensuring that quality is not only achieved but sustained.

Levent Kececi

Global Head, IT Governance and Infrastructure



Why choose S&O Capital



Elite, Senior-Only Teams: S&O Capital's experts possess decades of hands-on experience. Our clients are supported by senior professionals from start to finish, ensuring the **highest level of expertise and execution** throughout.



We stand behind our commitments: Our business model ties our fees to measurable outcomes and specific project deliverables, ensuring full transparency and alignment with our Clients.



Hands-On, Measurable Impact: We do more than offer guidance and step away. Our specialists actively engage with your team to apply strategies that generate measurable outcomes. **We accompany you at every step, from planning to execution.**



Exclusive Client Base: By working with only a select group of clients, **we ensure focused, undivided attention.** This approach allows us to become true partners to our clients, providing deeper involvement and commitment than larger firms juggling numerous accounts.



Rapid Execution, High-Quality Delivery: Our lean teams enable **quicker decision-making and agile execution**, delivering premium-quality results—advantages that larger firms with cumbersome structures often cannot match.



Specialists in Regulated Industries: We are well-versed in the unique complexities and regulatory challenges faced while operating in regulated industries. We provide insights and strategies **specifically designed for high-stakes, heavily regulated environments.**





S&O Capital

Real results. Lasting impact.

S&O Capital s.r.o.

ICO: 22004840

DIC: CZ22004840

Office:

Zahradnická 223/6, Staré Brno, 603 00
Czech Republic

Email:

info@socapitalgroup.com

Web:

<https://socapitalgroup.com>

Copyright © 2026 S&O Capital s.r.o.
All Rights Reserved.