

Bosch Limited Investors' Meet 2018

Changing landscape of Mobility Sector

28th August, 2018

Soumitra Bhattacharya, Managing Director, Bosch Limited

Bosch Limited – Investors' Meet 2018

Today we talk about

Bosch Group and Bosch India Overview

Changing landscape of Mobility Sector

Integrated System Solutions

Other Businesses

Bosch India Social Engagement

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The Global Bosch Group

Bosch Group: Four business sectors

Key Figures 2017*

Bosch Group € 78.1 billion euros in sales  402,166 associates



Mobility Solutions

- ▶ One of the world's largest suppliers of mobility solutions



Industrial Technology

- ▶ Leading in drive and control technology, packaging, and process technology



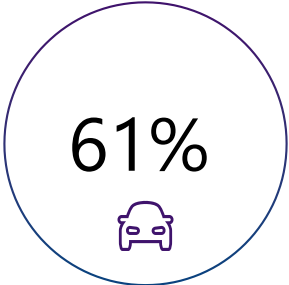
Energy and Building Technology

- ▶ One of the leading manufacturers of security and communication technology
- ▶ Leading manufacturer of energy-efficient heating products and hot-water solutions



Consumer Goods

- ▶ Leading supplier of power tools and accessories
- ▶ Leading supplier of household appliances



Share of sales



* as of 12.17

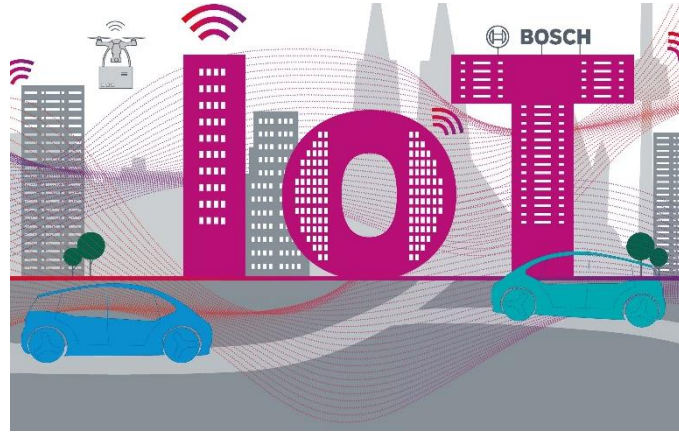
Transformation of Bosch

Key areas of transformation



Mobility

- ▶ Leading provider of mobility solutions
- ▶ Connected, automated, electrified, multimodal



Internet of things

- ▶ Leading provider of IoT solutions
- ▶ Connect products and domains to generate extra benefit for users



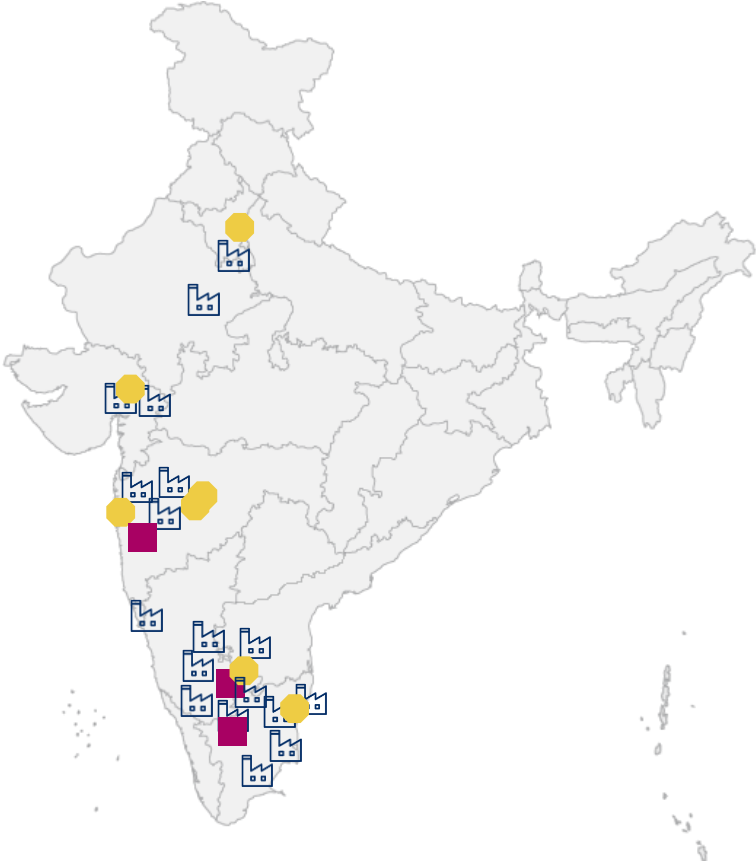
Cultural change

- ▶ New forms of leadership and collaboration
- ▶ Create a culture of innovation


Bosch In India



Overview: The Bosch Group in India, FY 2017-18




13 Companies


Sales: 192 bn



> 1,500 Suppliers


~31,000 Employees


> 3,500 Sales Outlets


18 Mfg. plants

Bosch Ltd.


Sales: 108 bn


~9,700 Employees

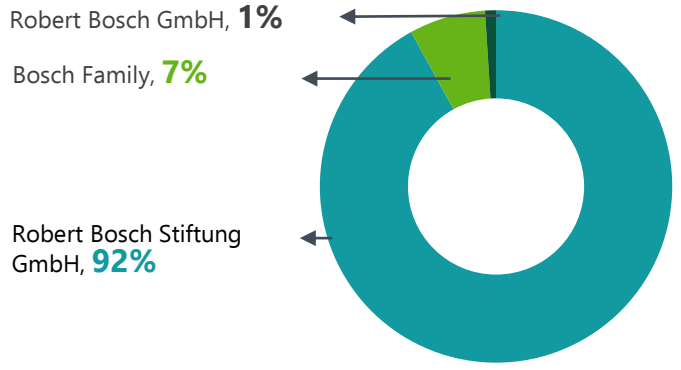

8 Mfg. plants

Bosch Ltd. is the flagship company of the Bosch Group in India

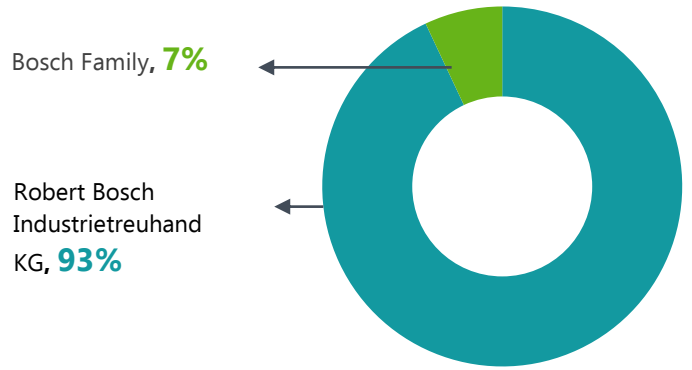
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Bosch's uniqueness

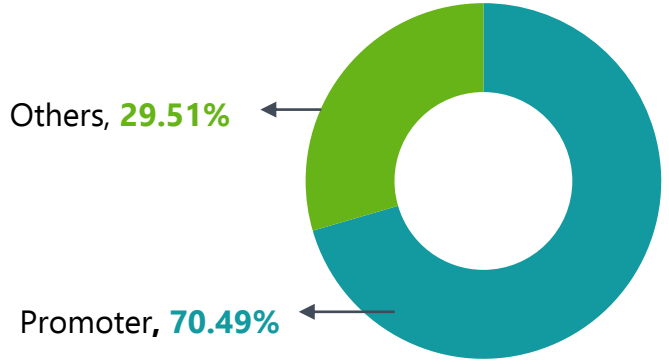
RB GmbH Shareholding



RB GmbH Voting Rights



Bosch Ltd. Shareholding and Voting Rights



Unique shareholding pattern → Globally: majority shareholding with a Trust

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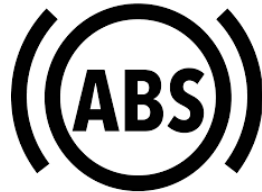
Bosch India Social Engagement

Mobility: Regulatory Push and Market Impulses



"PLAN: Shared, electric & connected mobility by 2032 and the way forward for Electric market segments based on economics: 2W, 3W, 4W & Buses"

- Report: **India Leaps Ahead, Transformative Mobility Solutions for All** by Niti Aayog



Emission Norms

BS4 countrywide, BS6 in 2020

Fuel Consumption Regulations

CAFE 2022

Crash Standard

All models from 2019

Safety

CV ABS 2015, PC and 2Wh ABS 2018,

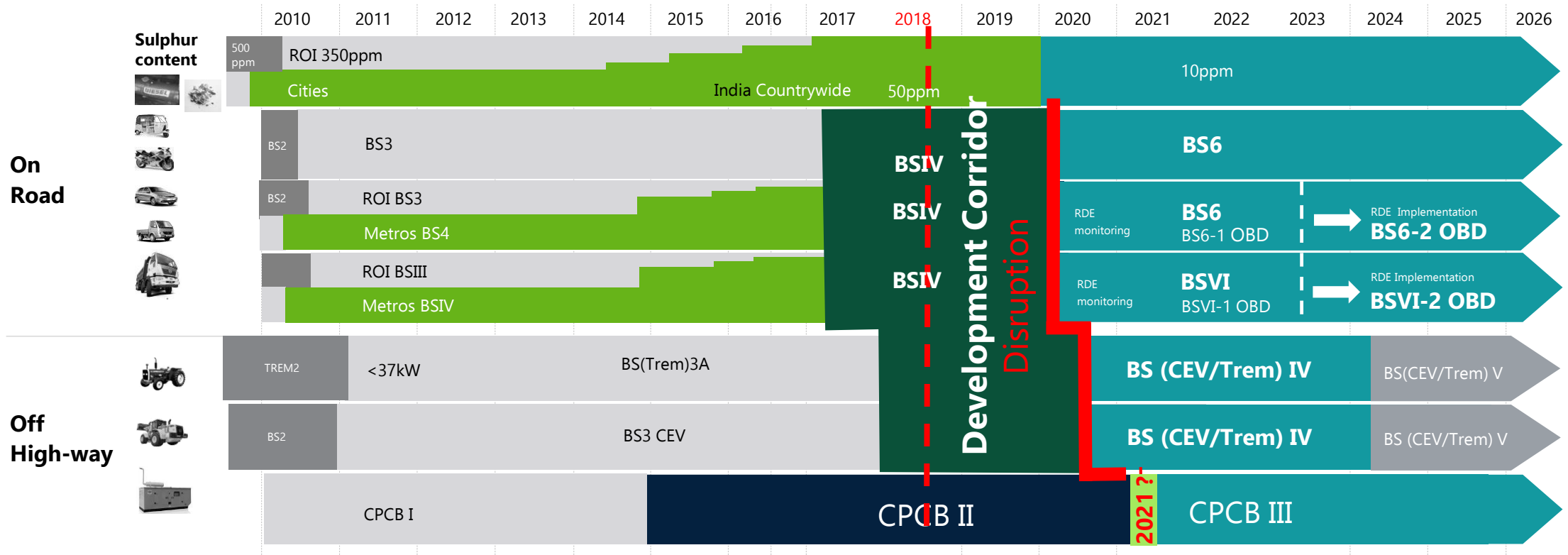
Market Trends

Electrified – NITI Aayog (e-mobility 2030)

Large amount of regulatory requirements and new market trends will drive fast technology and product adaptation for Indian Market

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Emission Roadmap – India



With leapfrogging to new stringent emission, monitoring and CO2 norms in all on- and off-road segments India is undergoing a disruptive technology change.

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Bosch Solutions for Electrification

**Launch of Project house
Electromobility**



**Solutions ranging from 48V Hybrids
to high voltage electric for all
performance / vehicle classes**



eScooter Sharing



HMI



Research and advanced engineering for future EV concepts



System integration



Charging Solutions



Re-generative braking systems PC



Thermal Management Solutions



48V and higher hybrid Solutions



eDrive for EVs



Battery for EVs

A modular product and services portfolio covering the entire ecosystem of electrification

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Future mobility centered around connectivity

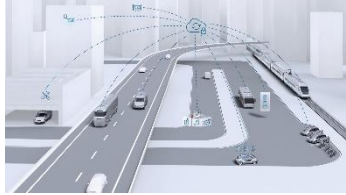


Electric driving



Automated driving

Connected mobility



Multimodal transport systems



Launch of Project house
Mobility Solutions

Parking management



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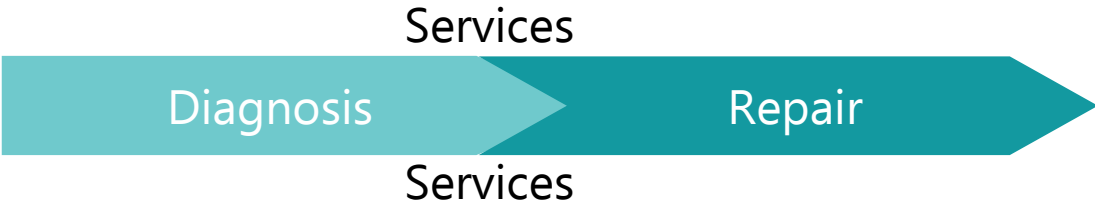
Integrated System Solutions

Other Businesses

Bosch India Social Engagement

AA India Overview

Parts, Diagnostics & Services: The AA Strategy



Parts

Diagnostics

Software ESI[tronic]

Test equipment & products

Workshop Services

Connected Cloud Services

Car Driver Portal

Technical training and hotline

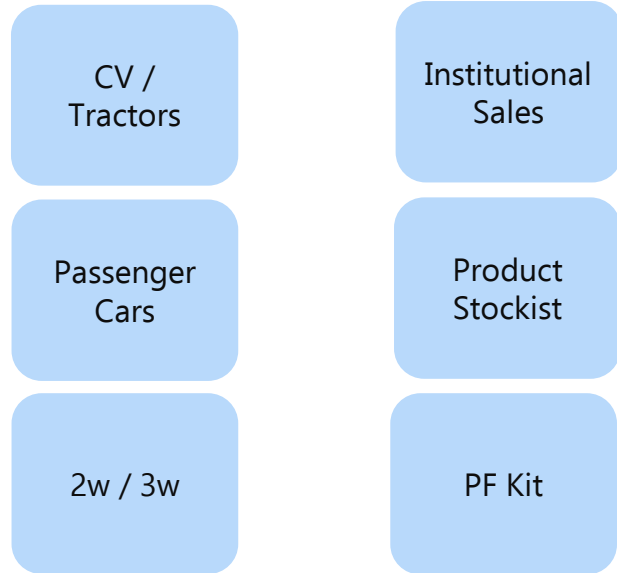
Connected Workshop

AA India Overview

Distribution Network

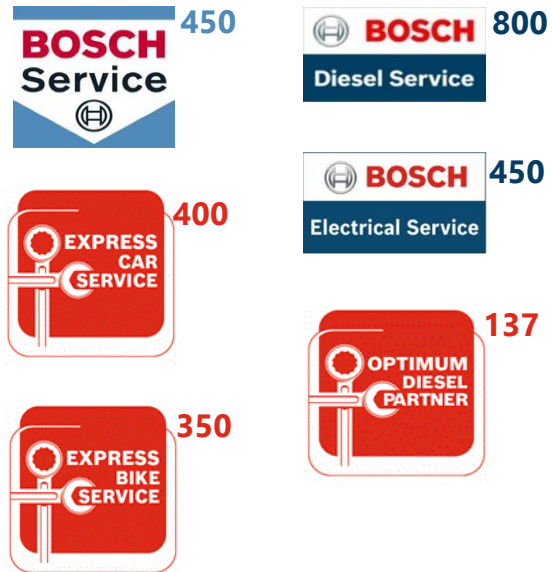
Parts, Diagnostics & Workshop Services

Distribution Channel



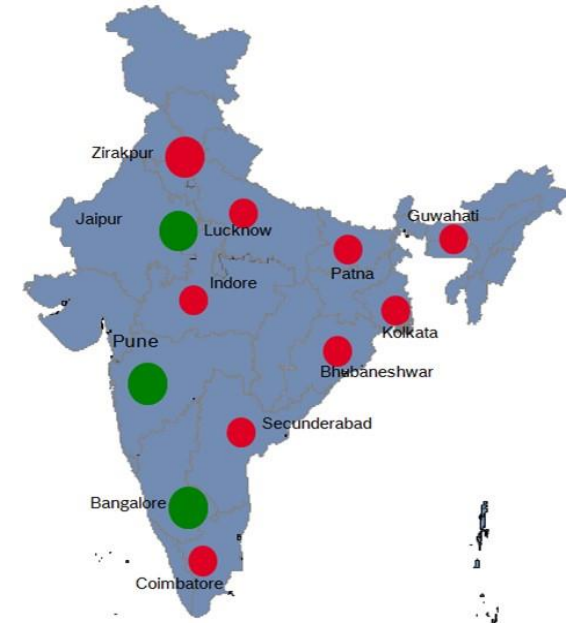
~1100 1st Trade Level Customers
>80,000 secondary sales outlets

WSC channel



>2500 Workshop partners

Supply chain



Warehousing, ~30,000 part nos

Bosch Power Tools Product Portfolio

Construction Range



Metal Working Range



Power Tool Accessories



Woodworking Range



Cordless Range



Total Measuring Solutions



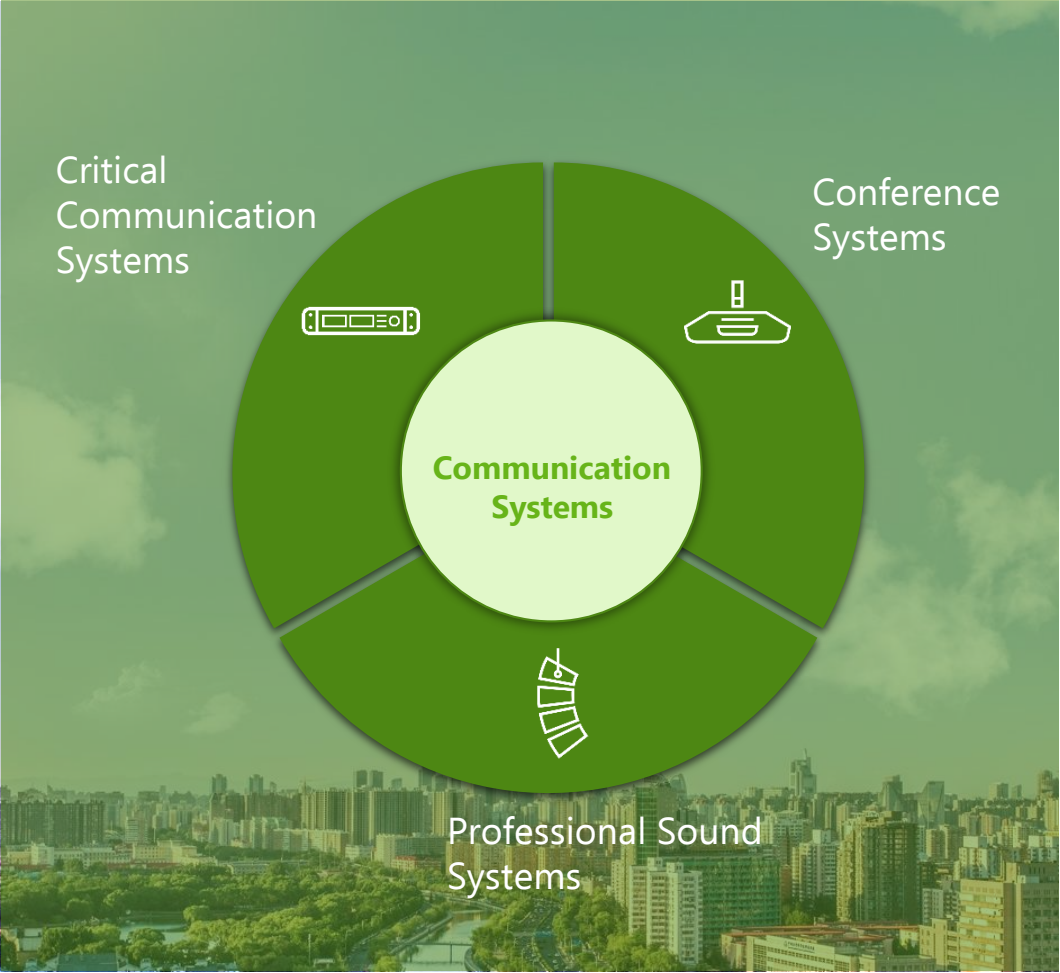
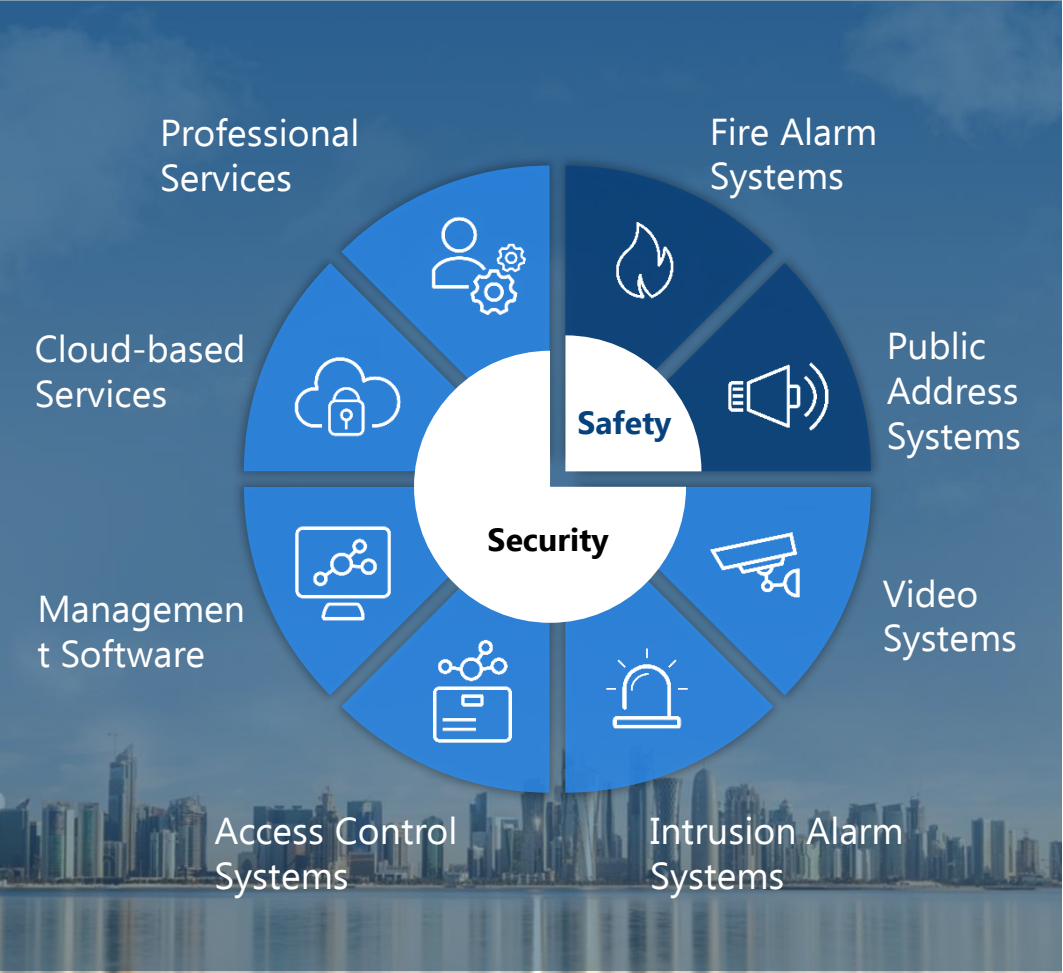
Cleaning Solutions for Maintenance



Service



Bosch Security and Safety Systems Solutions Portfolio



Bosch Energy and Building Solutions

End-to-end Energy Partner

“First choice for Energy Services for Industrial and Commercial customers”



Solar PV Solutions



Energy Efficiency Solutions



Industrial



Commercial

Best Rooftop Solar Project 2018 (Siemens)

National Energy Circle Award for Energy Efficiency, 2017

Intersolar Award 2014, 2015 (Maruti & CIAL)

Helping customers offset 1,50,000 metric tons of CO2 emissions every year

Key Accreditations



GOVERNMENT OF INDIA
MINISTRY OF NEW AND RENEWABLE ENERGY

Highest rating of SP1A Channel Partner for on-grid and off-grid Solar PV installations



BUREAU OF ENERGY EFFICIENCY
Government of India, Ministry of Power

Highest rating of Grade 1 ESCO for Energy Efficiency related offerings

Key Industrial & Commercial Customers

VE COMMERCIAL VEHICLES
A VOLVO GROUP AND EICHER MOTORS JOINT VENTURE



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Bosch India Social Engagement

Bosch India Social Engagement Once Face to Society

► We Skill

► BRIDGE:

- 16,000 youth trained and employed
- 148 Operational Centres across the country; Target 200 centres by year end

► Artisan Training

- Carpentry (Bangalore) and Electrician (Nashik) working very well
- Multiplier centres started in Tamil Nadu, Maharashtra and Rajasthan

► We Care

- CHDP in 300 schools in and around Aduadi, 70,000 children covered
- Aduadi dispensary upgraded at par with a private hospital
- Lalbagh (Cleaning Drive, Smart parking and Aerators in the lake)

► We Share

- Bosch-Akshaya Patra Mid-day Meals Kitchen opened in Jigani (15,000 meals per day)
- Bosch value add project in progress through IOT solution, to reduce wastage

► We Empower

- Focus on empowering girls and women across projects across locations
 - Rural areas, Employability, Confidence building



Artisan Center



Aduadi Dispensary (after upgradation by Bosch)



Bosch-Akshaya Patra Mid-day Meals Kitchen



Lal Bagh Cleaning Drive – Bosch Volunteers



*" When managing any undertakings
of Robert Bosch GmbH, the*

***principles of maximum
economic efficiency***

*shall be adhered to in the manufacture
of goods as well as in internal and
external administration."*

Robert Bosch,
guidelines for executors, dated Dec. 23, 1937, sec. 9

Thank You