3D EXPERIENCE FORUM 2012 / Investor Relations Lunch
Andreas Barth, MD Dassault Systèmes EuroCentral

Dassault Systèmes in Germany
Partner for Industry 4.0
Dipl. Ing. Andreas Barth, Dassault Systèmes

More than 20 years of experience in Automotive and IT

- Since 11/2011:
  VP Geographical Operations and Managing Director EuroCentral

  - 01/2010 - 10/2011: Board Member, SVP,
  - 2005 – 2009: Partner, Head of Sales, Director,
  - 1999 – 2004: Head of Sales Automotive, Global Account Director
  - 1996 – 1998: Sales Manager Automotive,
  - 1988 – 1995: Multiple Managing Positions,
Agenda

1. Who we are – 3DS EuroCentral
2. What does matter in our market environment
3. Where 3DS in Germany is now
4. Where we want to go to: Industry 4.0 and 3DEXPERIENCE
Dassault Systèmes Germany – Headquarter EuroCentral

► For more than 30 years:
CATIA and other 3DS applications were exclusively distributed by IBM and resellers
► Since 2005:
Dassault Systèmes established its own subsidiary in Germany, managing the SMB business
► 2010:
Acquisition of the IBM PLM business
Opening new headquarter 3DS EuroCentral in Stuttgart
► Today:
More than 20,000 customers in 12 industries
More than 500 employees
2 Market trends

- Connecting product development and production
- Involvement of consumers and other stakeholders in product development
- Tools for collaboration in global manufacturing chains needed
- Need for end-to-end integration of applications in various units of an enterprise
Strong Industries Drive Largest PLM Market in Europe

- Leading economy in Europe
- **Automotive:** German cars highly demanded globally, export revenue is about double of the revenue in Germany and still growing strongly
- **Manufacturing:** still on record track
  - 6,000 companies with 1 Million employees, a volume of more than 200 billion €
  - “World Champion of Exports” with world market leaders in 29 of 32 industries
  - Electronics industry is expecting record year
- **High Tech / Information Technology:** BITKOM reports investments above average, especially in SMB
- **Consumer Goods Retail:** Growing revenue, about 580 million € in 2012
Industry 4.0 - the Latest Industrial Revolution is Going on

- Initiative of German businesses, politics and science since 2011
- Opening of office “Industry 4.0” under umbrella of industry associations
  - VDMA, ZVEI, BITKOM
- Flagship project of Germany’s high-tech strategy
- Driving theme: integration of IT and Manufacturing
- Clear goals:
  - to remain a world-class manufacturing base
  - better performance and higher productivity
  - new business models based on cyber-physical systems
- Focus of the National IT Summit with the Chancellor
  - Virtualize – Network - Start-up

"Technology leadership in the future will require unprecedented system integration capacities“
Henning Kagermann
Generation “Social Media” will Change the Way of Working

- Digital natives
- Using digital and mobile devices = sharing information
- Multi-channel education
- Used to collaborate, without hierarchies
PLM Market in Germany

- Strongest market in Europe

- High penetration, very competitive

- New demands and challenges by various industries
  - Industry specific and integrated solutions and seamless processes
  - Simplification of user experience
  - Usage of intelligent, multifunctional networks
3DS in Germany today

- Key contributor for Europe
- Customer base
- Situation in automotive
3DS Business in Germany – a Key Contributor for Growth in Europe

Strong growth in Europe in the past 2 years

Germany nearly 1/3 of Europe software revenue
# Broad Customer Base and Healthy Business

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<th>INDUSTRY CATEGORY</th>
<th>Industry</th>
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<td>Financial &amp; Business Services</td>
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- Around 70% of business in core industries
- Strong indirect business
- Strong brands:
  - V6: key and catalyst for innovation and new business
Brose a Long Term DS Customer

► Context
  ▶ Supplying more than 50 automotive manufacturers and suppliers with mechatronic systems and electric motors for the vehicle body and interior
  ▶ Started with CATIA in mid 1980s
  ▶ Today: V5 and V6 Solutions with ENOVIA, CATIA, Systems Engineering, and 3DVIA

► Challenges
  ▶ Global Collaboration: globally distributed multi-site design and manufacturing
  ▶ Mechatronics: combination of mechanical and electrical parts and embedded software
  ▶ Multi-CAD: according to OEM requirements, using one common database worldwide

► Targeted achievements
  ▶ Clear vision:
    ● Technology and market leader in all business segments
    ● Using best technology available
  ▶ Making best technology standard within Brose group
Lufthansa Selecting Exalead

- **Context**
  - World's fourth largest airline with almost 700 aircraft is the second largest passenger airline fleet in the world
  - 2011 revenue, € 28.7 bn

- **Challenges**
  - Empowering Lufthansa’s “knowledge workers” to focus on added values through intranet search, people search, and search based applications
  - Real time aggregation of unstructured and semi-structured content from various internal and external sources
  - User-friendly search based application interface with facets, rating, save queries, alerting, suggestions, similar search, etc. for **instant and intuitive personalization**

- **Targeted achievements**
  - Providing a **Enterprise Search Solution** for up to 120,000 employees worldwide
Close Look on Automotive

- Worldwide an important industry
- Driver of innovation with impact on other industries
  - High R&D expenditure
  - Using new technologies and materials
  - Forerunner in efficient manufacturing processes
- Customers
  - Sustainable partnership with BMW in key applications such as systems engineering and the new "i" brand
  - Porsche – all 3DS brands involved and a long-term customer commitment
  - New business with VW Group
  - Daimler – strong customer
- High growth potential for V6
- Focus on openness in industry – supported by ProSTEP iViP ‘Codex of PLM Openness’
4 Strategy 3DS Germany

- New business fields
“It was time to open new horizons” Bernard Charlès, CEO and President Dassault Systèmes

- **3DEXPERIENCE**
  - A 3DEXPERIENCE platform to serve the “social” enterprise of the 21st century.
  - Makes virtual reality possible and will change the way products will be developed and produced – the next step beyond PLM.
  - 3D Experiences enable any enterprise stakeholder to participate in the innovation process, contributing to drive value for the end consumer.
Transportation of Art!
Our new business in Germany?
3DEXPERIENCE opens doors to new business

- Art Collection of German Parliament
- 3,000 works of art
- Partly not accessible for the public
- A 3DS Project brings the artworks to the public - with 3D
  - 3D Virtual Reality representations of the artworks
  - Visualization of the entire architecture
  - Simulation of light and shadows with 3DVIA Studio
  - 3DEXPERIENCE
3DEXPERIENCE

- From German Parliament to the world
- Realistic in 3D
- Enriched by information about artist and work
- Access by mobile devices, Computer, CAVE
- Virtual museum’s art guide
- Democracy for art lovers
Exciting projects in Germany

V6 at Universities and R&D
Fraunhofer (IPK), TU Berlin, FH Hannover, FH Kaiserslautern, TU Darmstadt

Meyer Werft  CLAAS  KUKA Systems  LTA Technology  Märklin

BASF  s’Oliver  Repower
Expanding the Leading Position

- PLM is our core competence – V6 is leading the market into a new phase
- Sustainable business with key accounts– our industry approach pays off
- New business in non-traditional industries – new experience with our 3DEXPERIENCE platform
- Increasing awareness by networking with multipliers: BITKOM, VDMA, Universities – building up a network of excellence
- 3DEXPERIENCE meets expectations of next generation managers
Ready for Industry 4.0

- Combining manufacturing and IT
- Multiproduct portfolio
- Intelligent, integrated and communicating systems
- From Engineering to PLM to Industry 4.0 with integration of mechanics, electronics, software
- Simplification of systems
- Openness for transformation and mobile applications