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# Investor's Meet

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## Bosch Limited

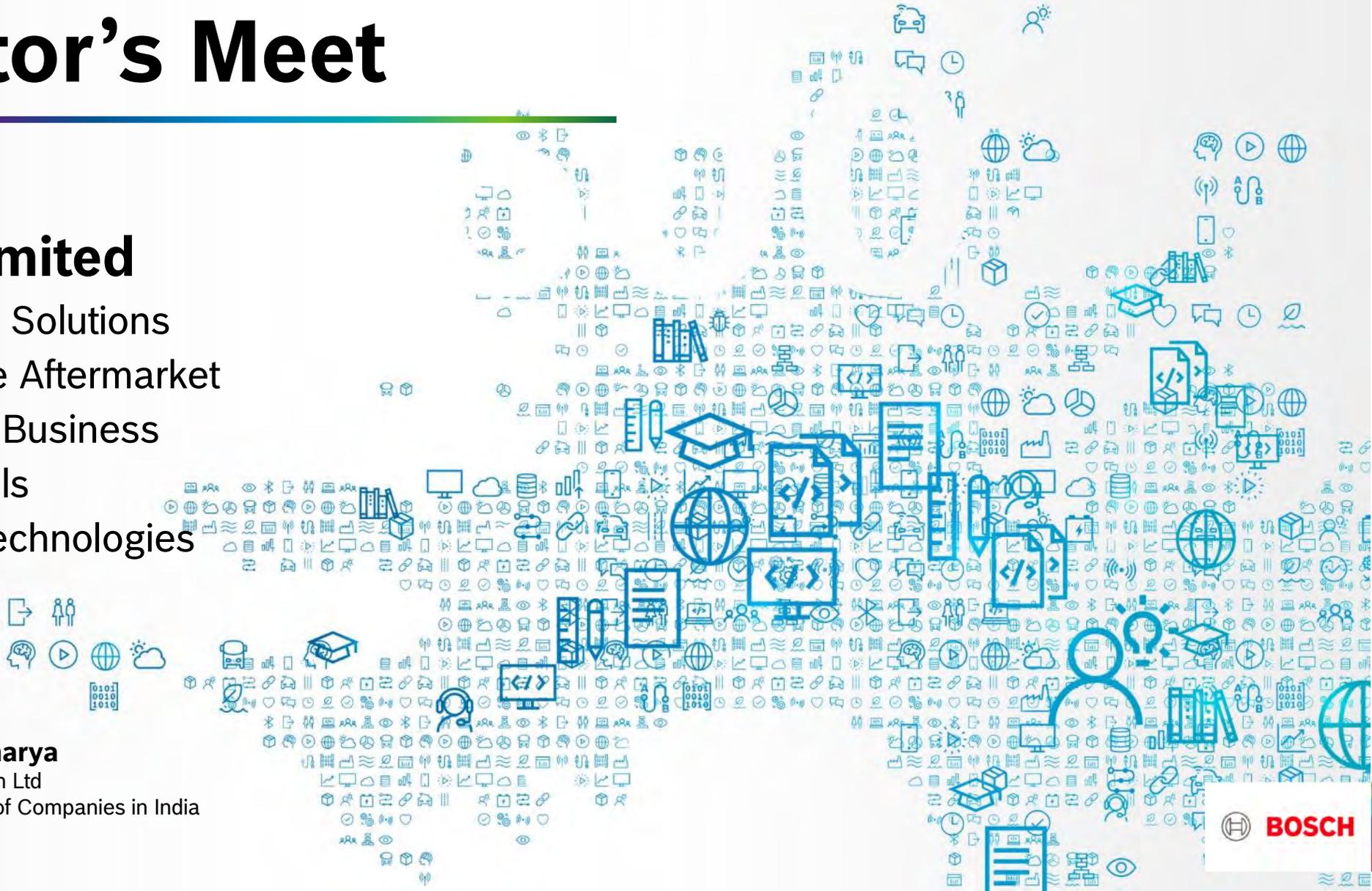
- Powertrain Solutions
- Automotive Aftermarket
- 2 Wheeler Business
- Power Tools
- Building Technologies

**Soumitra Bhattacharya**

Managing Director, Bosch Ltd

President, Bosch Group of Companies in India

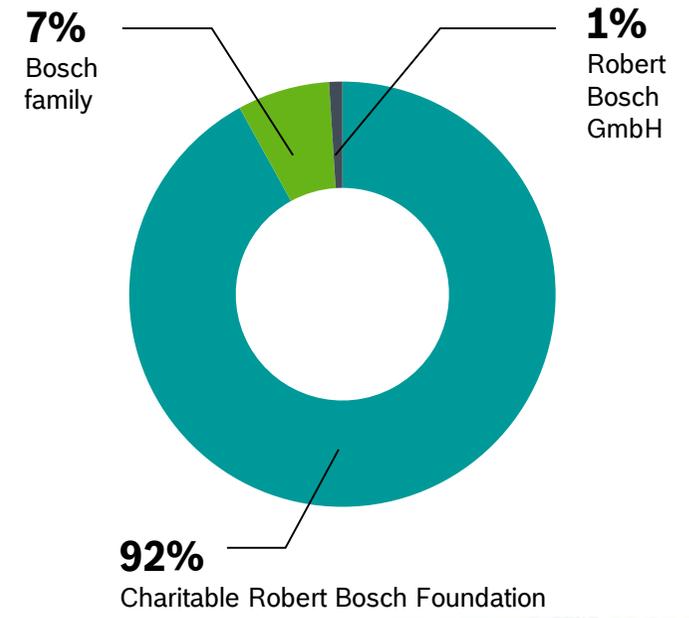
31.03.2021





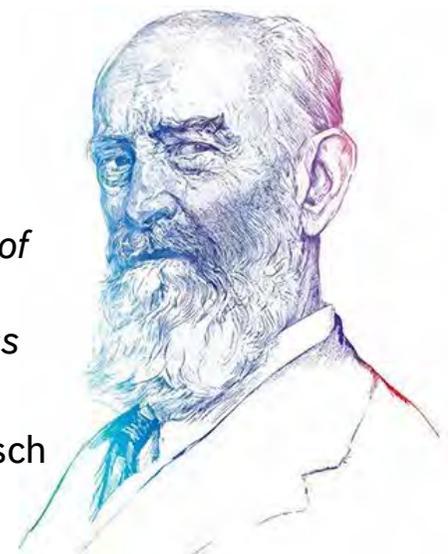
**A foundation as major stakeholder**  
Since 1964, Bosch's majority shareholder has been Robert Bosch Stiftung GmbH, a charitable foundation. The Stiftung carries on the charitable and social endeavors of the company founder in contemporary form.

## Ownership



*“Technology, which is designed and has the capability to help the whole of mankind make the best of their lives and find happiness in life.”*

~ Robert Bosch



# BOSCH GLOBAL BUSINESS OVERVIEW

## KEY FIGURES



Mobility  
Solutions  
**59%**



Industrial  
Technology  
**7%**



Energy and  
Building Technology  
**8%**



Consumer  
Goods  
**26%**



Turnover 2020

**71.6 billion EUR**



More than

**3,90,000 employees**

**Bosch Global**



EBIT 2020

**1.9 billion EUR**



Development Engineers

**73,000 employees**

Note: SGIN is new carved-out entity from RBIN w.e.f 01<sup>st</sup> Aug,2016. New Entity TNS: 4,527m and PC: 585. is not included in the above chart. Figures don't include BSH.

# BOSCH IN INDIA BUSINESS OVERVIEW

## KEY FIGURES 2020



1922



**1<sup>st</sup> Sales Office**  
in Calcutta

1953



**1<sup>st</sup> Manufacturing**  
**Operations** in Bangalore

2022

**100 years Bosch** in India  
**69 years Make** in India



15  
**Group Companies**



166  
**Billion rupees**  
**Sales Revenue** In 2020



30,000  
**Associates**



6,000+  
**Suppliers**



16  
**Manufacturing**  
**Facilities**



84  
**Billion rupees**  
**Bosch Ltd**



6200  
**Bosch Ltd**  
**Associates**



3,500+  
**Sales Outlet**



**MOBILITY**  
**SOLUTIONS**



**ENERGY AND**  
**BUILDING TECH.**



**CONSUMER**  
**GOODS**



**INDUSTRIAL**  
**TECH**

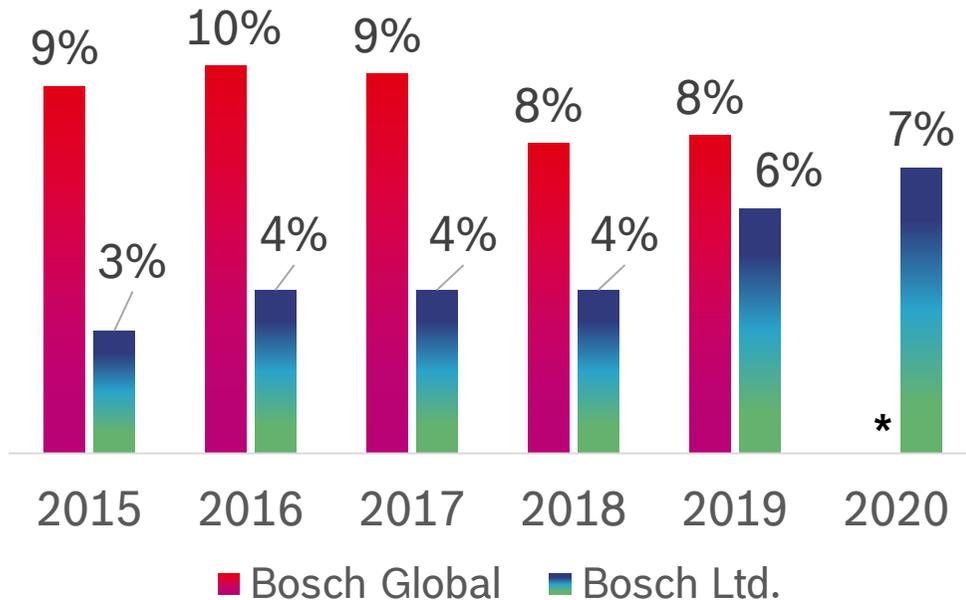
# BOSCH IS ONE OF THE WORLD'S MOST INNOVATIVE TECHNOLOGY COMPANIES

**€6.1B**

Investment  
in R&D globally  
in 2019

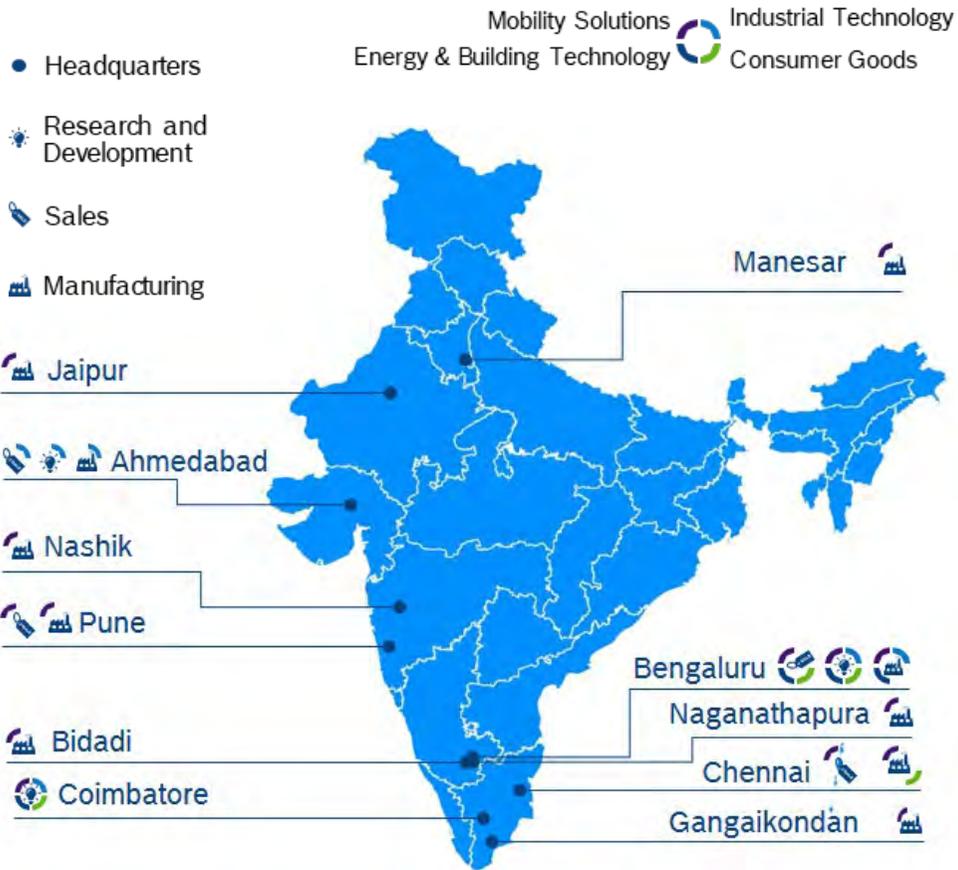
**₹5.9B**

Investment  
in R&D by Bosch  
Ltd. in 2020



- Bosch globally has always invested >7.5% of its total turnover in R&D since last 5 years
- Bosch Ltd. has started on the journey to continued investments in India to expand their portfolio

# BOSCH IN INDIA MANUFACTURING STORY



since **1953**  
Make in India

**16**  
Manufacturing  
Facilities

Bidadi



Ahmedabad



Jaipur



Chennai



Chakan



Gangaikondan



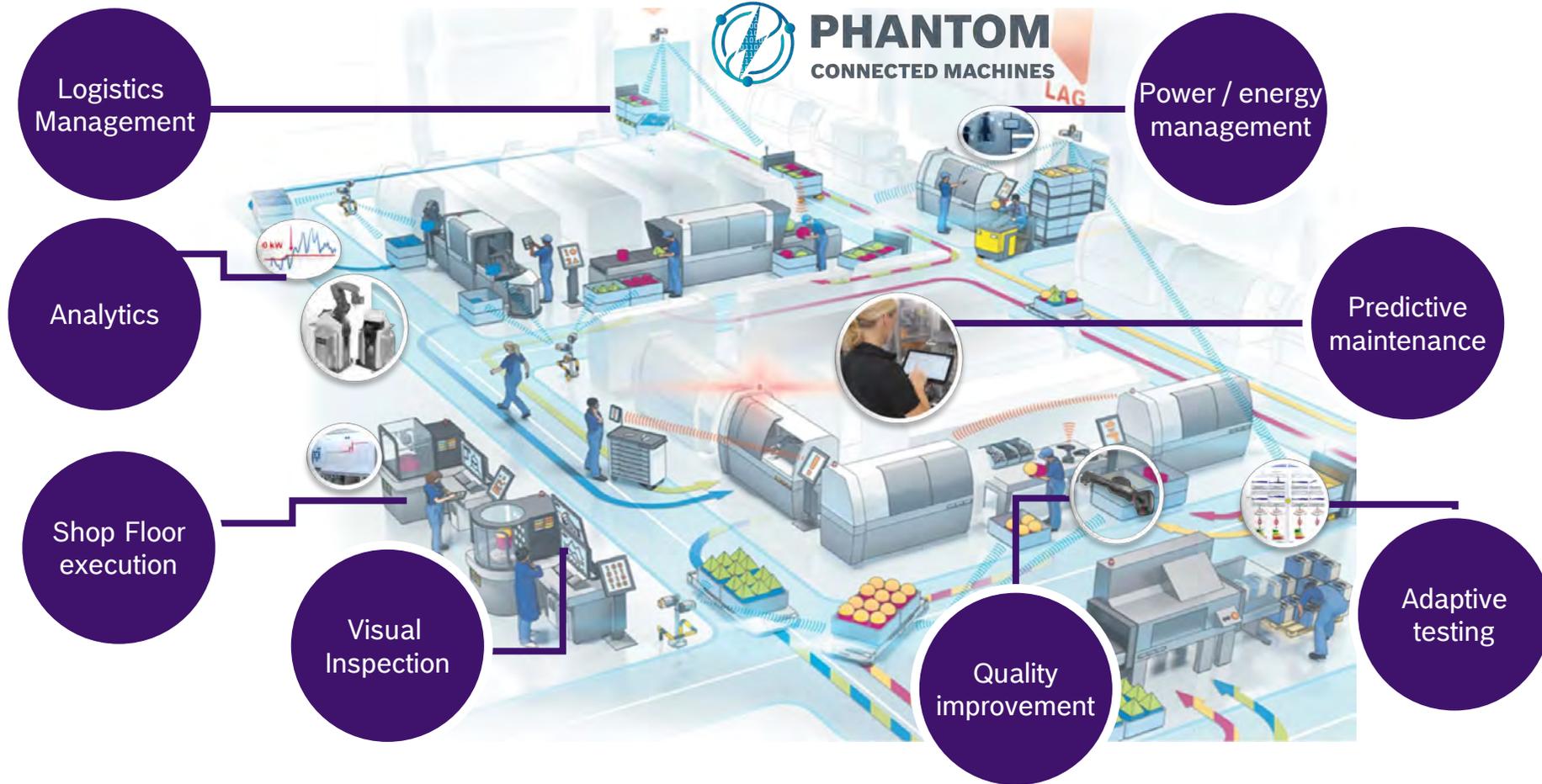
Naganathapura



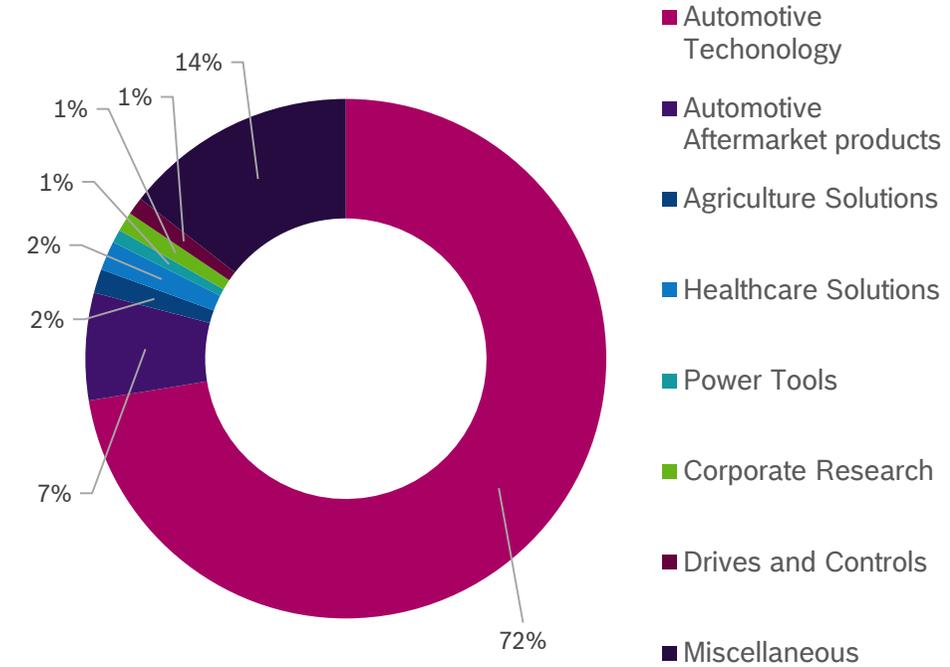
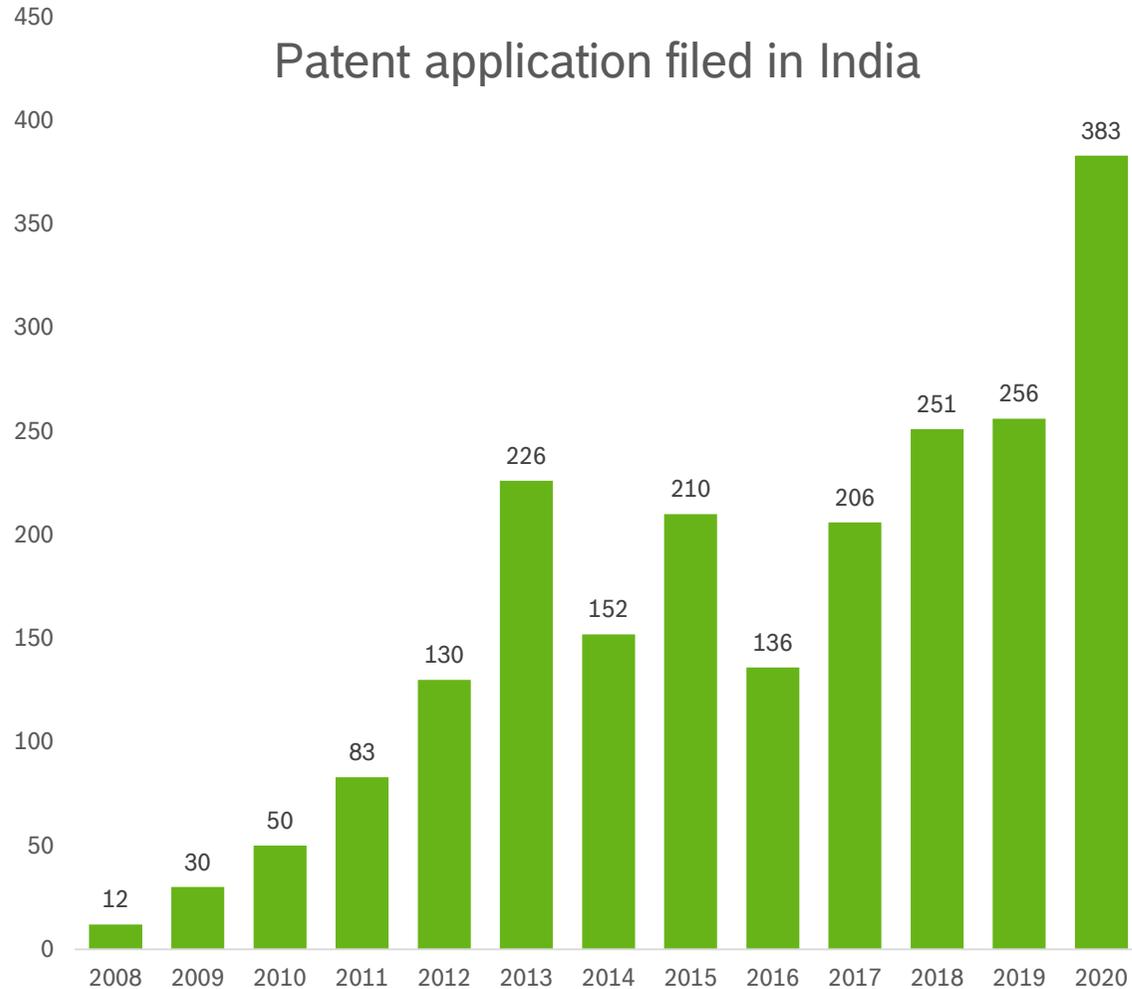
Nashik



# FACTORY OF FUTURE | LEAN & CONNECTED



# BOSCH IN INDIA INNOVATION STORY



- ✓ Increasing portfolio in the field of AI, ML, Blockchain, Electrification, Smart products, I4.0
- ✓ Well established inventor reward process

# MACRO ECONOMIC IMPULSES



Geo political Issues



Consumer Mindset

Self Reliant India



Disruptive Technologies



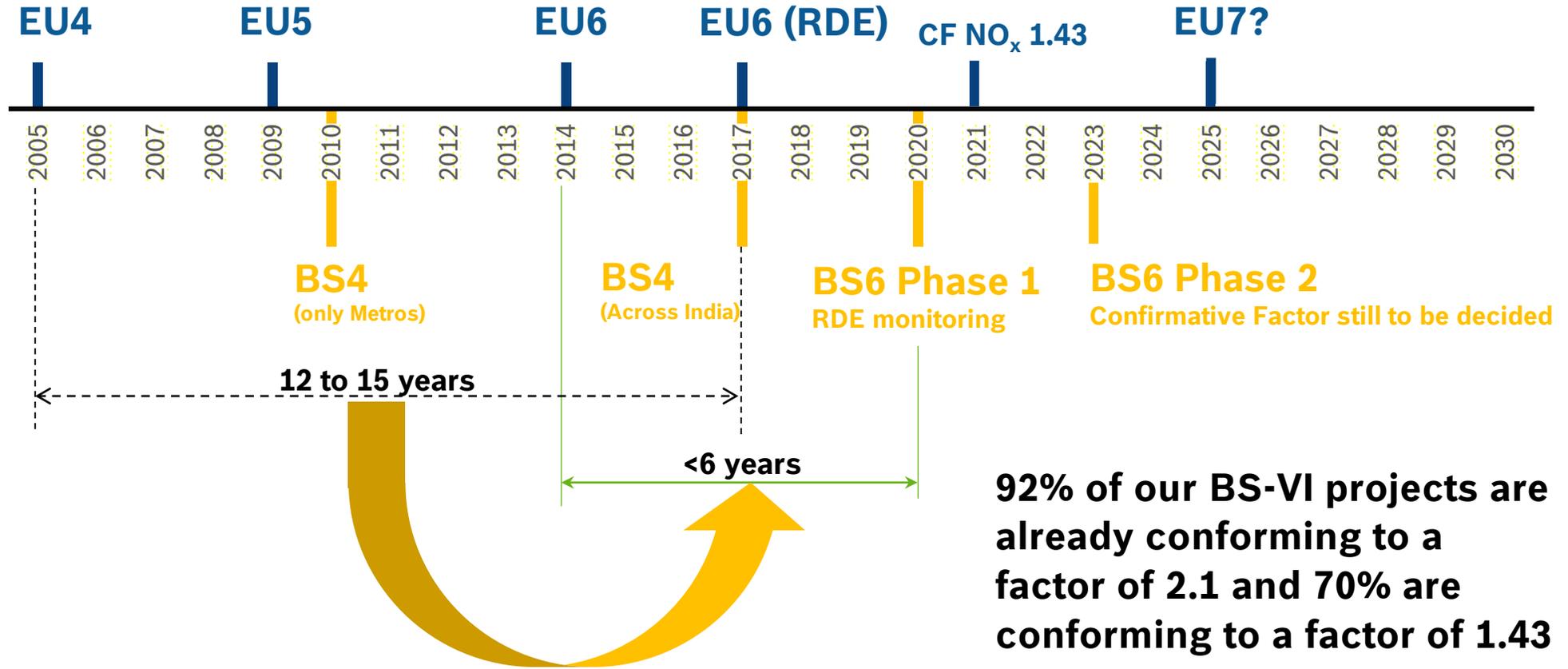
**PLI**  
**EoDB**  
**Labour Codes**  
**Corporate Tax**  
**Supply Chains**  
**Derisk**

Automotive Market Insights



Legislative Framework

# AUTOMOTIVE INDUSTRY | REGULATORY COMPARISON

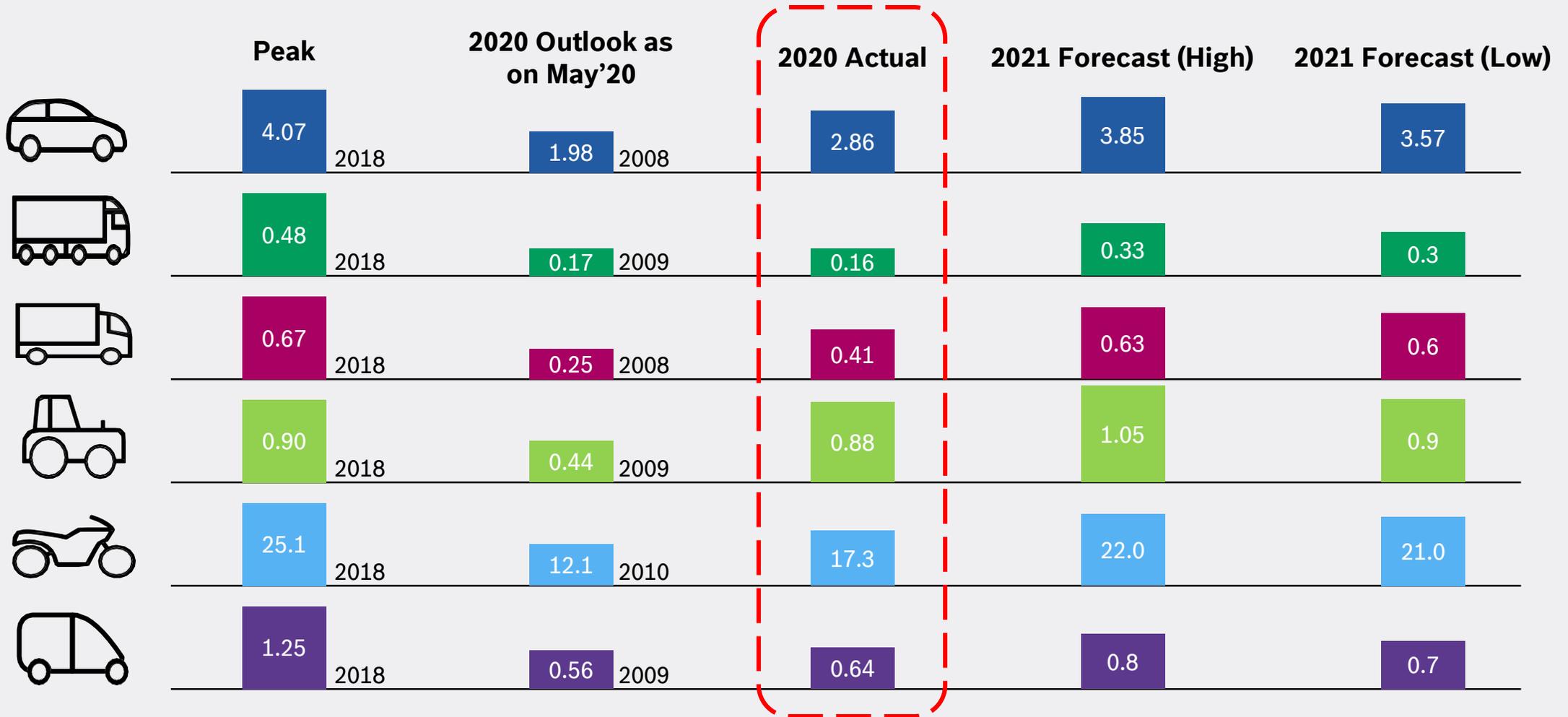


Leapfrogging to BS6 = Technology backlog from ~12yrs to < 6yrs | Timeline for policies should not change

# CURRENT MOBILITY SCENARIO

High scenario: FY 2022 – GDP growth = 11.5%

Low Scenario: FY 2022 – GDP growth = 8.6%



Unit of Measure in Mio vehicles

F2021\* :- Forecast total sales Volumes for 2021

Reference: Econometric model Forecast

# Mobility Portfolio



PREPARED FOR THE FUTURE

---

**From Powertrain to Connectivity to Safety**  
Clean, Efficient & Technology Agnostic Mobility Solutions

# MOBILITY TRENDS OF THE FUTURE

**sustainable**

**safe**

**exciting**

**Our purpose**

**S**

**Software & Services**

SW-defined systems, data-driven services

**P**

**Personalized & User Experience**

User-centered mobility for people and goods

**A**

**Automated**

Assisted & automated vehicle operations

**C**

**Connected Systems**

steering, braking, powertrain

**E**

**Electrified**

BEV, H2, actuators, thermal systems, energy supply

**Today's business & Growth fields**

**PURPOSE & AMBITION**

**A**

**MOBILITY  
VALUE CHAIN**

**B**

**CUSTOMERS**

**C**

**PORTFOLIO &  
TECHNOLOGIES**

**D**

**PEOPLE &  
LEADERSHIP**

**E**

**IMPLEMENTATION & EXCELLENCE**

# Electromobility: **FUTURE CORE BUSINESS**

€ **5** bn

Upfront investments

**90**

Powertrain  
electrification  
projects



In 2020, orders worth

€ **7.5** bn

€ **700** m

Investment 2021

Global Focus

# MOBILITY SOLUTIONS

Our vision: mobility “without side-effects”



EMISSIONS  
FREE



ACCIDENT  
FREE

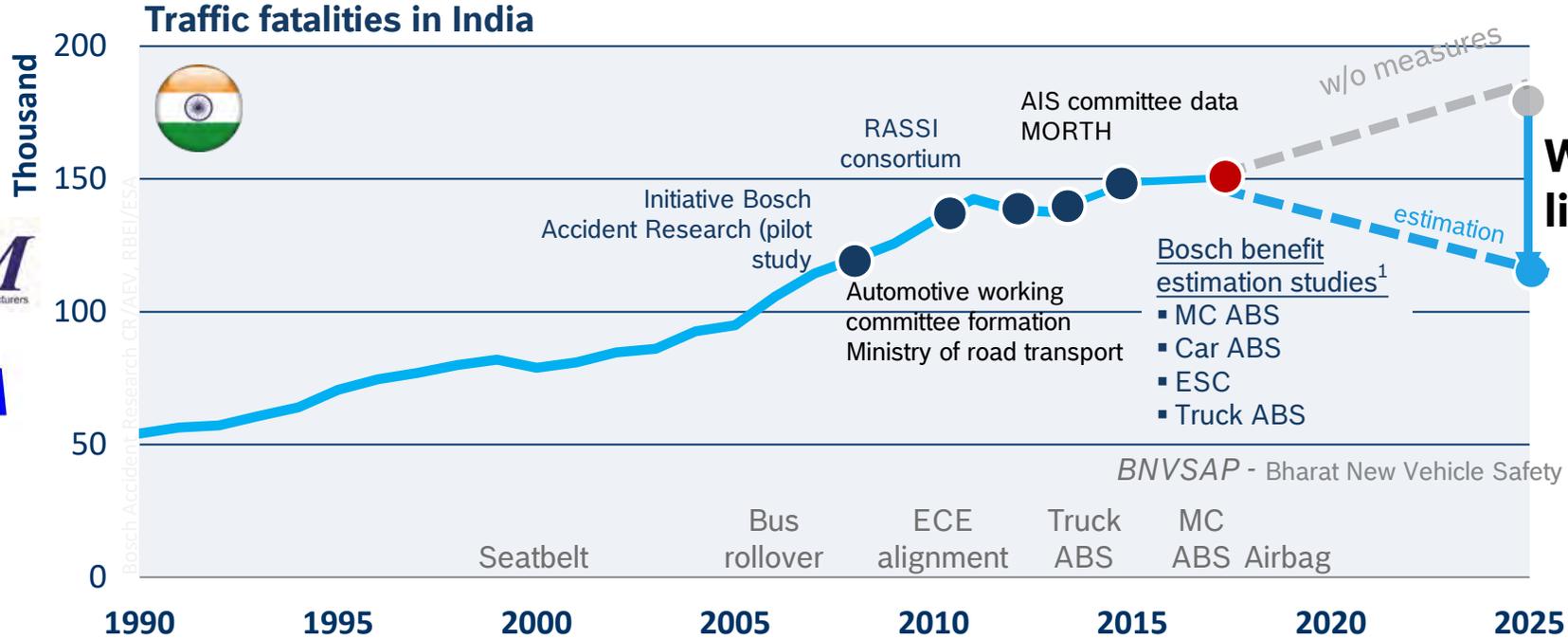


FASCINATING



# SAFE MOBILITY

## Bosch Research – Journey of Decade (2010 – 2020)



**We save lives**



सत्यमेव जयते



**Bosch Accident Research established evidence based data collection thus enabled to identify countermeasures and supports to improve road safety**

1) Source: Bosch Accident Research CR/AEV; RBEI/ESA; Forecast estimated based on results from studies and other measures; 100% installation rate





# ENGAGEMENT OF BOSCH WITH INDUSTRY & GOVT. BODIES

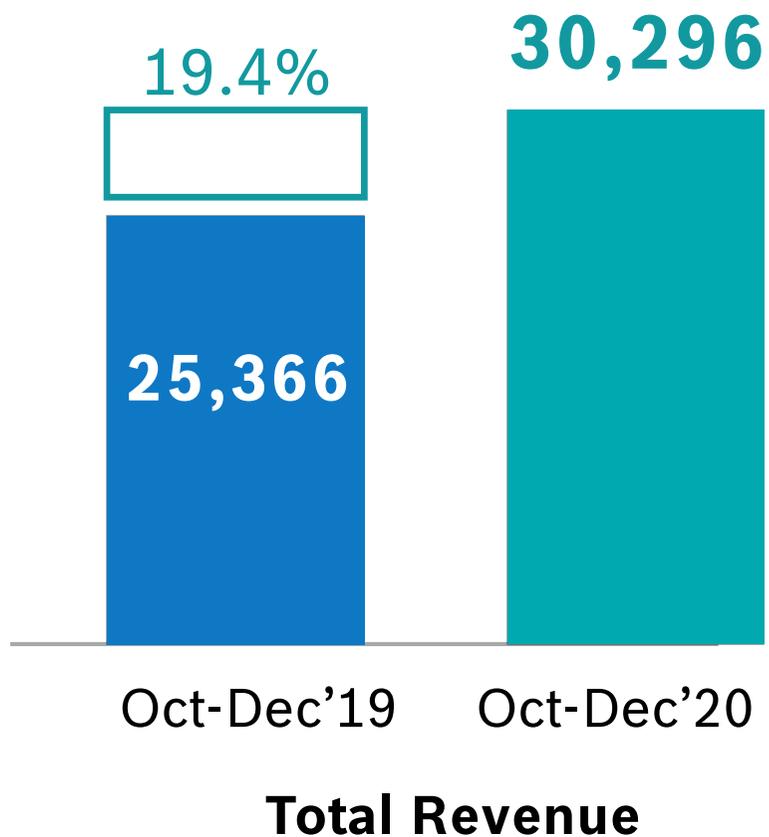


Technology agnostic solutions provider

# Bosch Ltd | Investor's meet

## Financial Performance | Q3 F2020-2021

Values in m INR



**Operating Profit (EBIT)**

2,611.7 (8.6% oS)  
(+24.1% PY)

**Profit Before tax (PBT) w/o exceptional items**

3,656.8 (12.1% oS)  
(+5.2% PY)

**Profit Before tax (PBT) w. exceptional items**

2,190.1 (7.2% oS)  
(+56.4% PY)

**Profit After tax (PAT)\***

1,857.7 (6.1% oS)  
(+55.6% PY)

# We **LEAD** Bosch

#People Obsession  
#Customer Obsession  
#Profitable Growth Obsession





You work in a great place to work!

# Bosch India Social Engagement

## Skilling in Karnataka



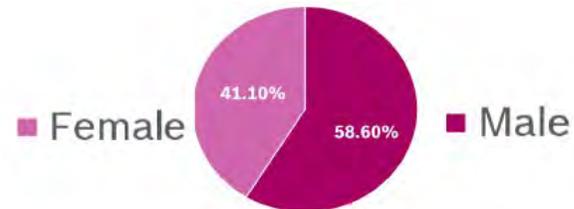
### BRIDGE

8 years of making less-educated youth employable through BRIDGE Centers across Karnataka



8,000+ BRIDGE beneficiaries in Karnataka

**26** Districts    **62** Centers    **25** Govt. ITIs



### PPP with Govt. of Karnataka

#### Upgradation of 25 Govt. ITIs in Karnataka



#### Support to the ITIs:

1. Bosch Technical Lab
2. Curriculum Modernisation
3. Training ITI Trainers
4. Industry Exposure

#### 'Model ITI' at Govt. ITI, Diary Circle, Bengaluru

Development of the Model ITI (Block I) at the ITI by Bosch included the setting up of:

1. Train the Trainer Lab
2. Mechatronics Lab
3. ICT Lab
4. Advanced Manufacturing Lab
5. Modern Carpentry Lab



Inauguration by Addl. Skill Secretary, GoK



Visit of the Deputy CM, GoK

### Artisan Training

#### Carpentry

Artisan (Master) Training Center in Carpentry, Adugoddi Plant, Bengaluru



Artisan (Multiplier) Center in Carpentry, The Art of Living, Bengaluru

#### Electrical

Artisan Training Center (Multiplier) in Electrical at BESIT Polytechnic, Bengaluru



# CONTRIBUTIONS

BY

BOSCH LTD

IN FIGHT AGAINST

# COVID-19

## ₹50 Crores

Pledge by Bosch Group in India

>100,000  
masks per day



### CareZeus

Hospital Tracking  
Platform for COVID-19

Track availability of beds, ventilators and ICU's  
for faster response on field



Enabling healthcare facilities to fight the pandemic





CO<sub>2</sub> neutral

# Sustainability – CO<sub>2</sub> neutrality

Bosch is committed to climate action. In 2020, we want to become carbon neutral worldwide.





100 years of Bosch India  
in 2022

**BOSCH ADUGODI**  
*A Smart Campus*

Thank you!