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Bandra-Kurla Complex  
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February 17, 2025

Dear Sir/Madam,

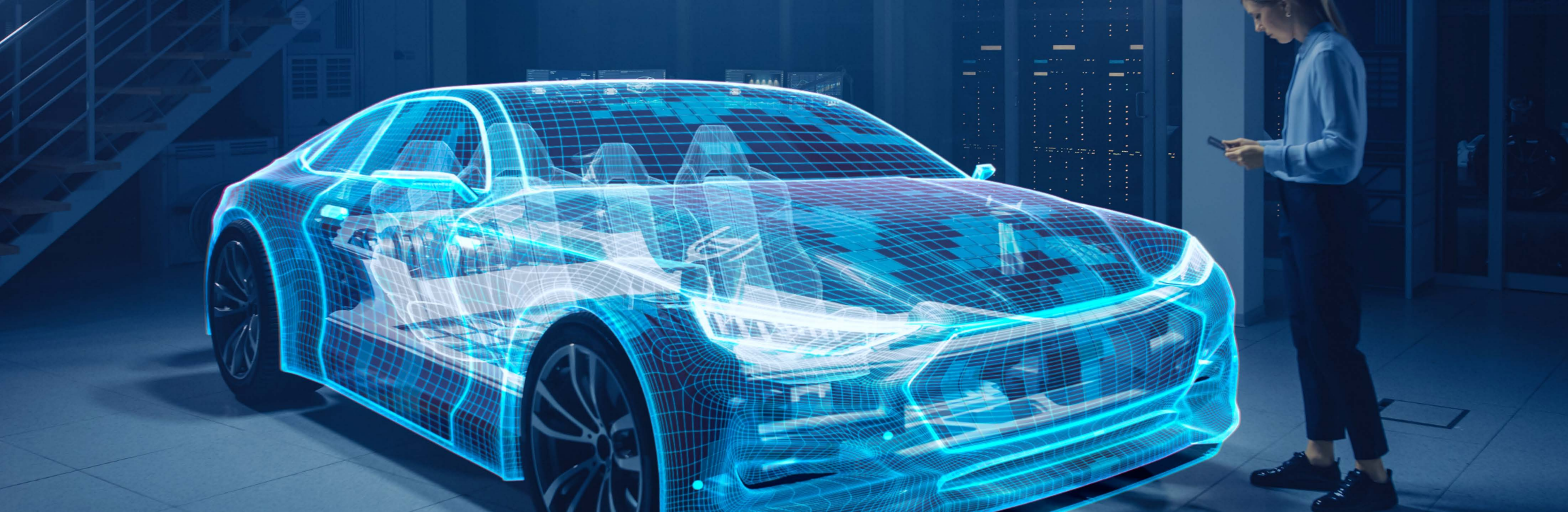
**Sub: Intimation under Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015- Investor Presentation.**

Pursuant to Regulation 30 of the Securities and Exchange Board of India (Listing Obligations and Disclosure Requirements) Regulations, 2015 and further to our earlier letter dated February 11, 2025, intimating the Investor/Analyst meet scheduled for February 18, 2025, we enclose herewith the presentation for the investor conference, 'Chasing Growth', organized by Kotak Securities Limited.

This is for your information and records.

Yours faithfully,  
**for Bosch Limited,**

**V. Srinivasan**  
**Company Secretary & Compliance Officer**



# Future of Mobility

**Kotak's Annual Investor Conference**

February 18, 2025

# Bosch Limited | Kotak's Annual Investor Conference



Guruprasad Mudlapur

Managing Director and Chief  
Technology Officer, Bosch Limited  
and President, Bosch Group India

# Future of Mobility

## Kotak's Annual Investor Conference 2025

At the outset, we would like to reinforce our Safe Harbor statement. In today's interactions and presentation, there may be some predictive statements that reflect our current views about Bosch Limited's future performance, but these are subject to risks and uncertainties

- *Safe Harbor Statement*



# Future of Mobility



Megatrends

Automotive tech trends

Consumers stack and buying

Tech-stack and architecture

Future of mobility ...



# Future of Mobility

## Megatrends

“Disruptions & boundary conditions that are shaping the Indian Economy”



**Renewables**

~50% RE by 2030,  
Policy support



**Middle class**

Doubling per capita  
income by 2030



**Demography**

~50% GenZ & Millennial's  
by 2030



**Urbanization**

2x rise in urban  
population by 2030



**Digitalization**

Digital economy will  
contribute to 20% by 2030

# Future of Mobility

## Key Automotive Technology Trends 2025



Advanced sensor & perception systems enabling L2++ ADAS

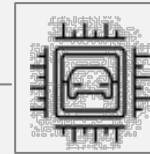
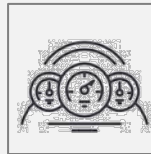


Mixed fuel powertrain options will co-exist alongside electrification

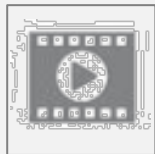
Occupant & asset safety with safety features like 6x Air bag, ESP, cyber security, DMS, OMS



Connected cockpits for enhanced user experience, HD maps, HUD, voice commands, AI based personalization's



E/e architecture led changes for performance compute : Software & Hardware decoupling. OEM control via Operating Systems.



3<sup>rd</sup> party software & content aggregation, white-labelling. 4K HDR interoperable displays



Business model innovation to accelerate technology adoption, like ecosystem charging, BaaS & ownership models



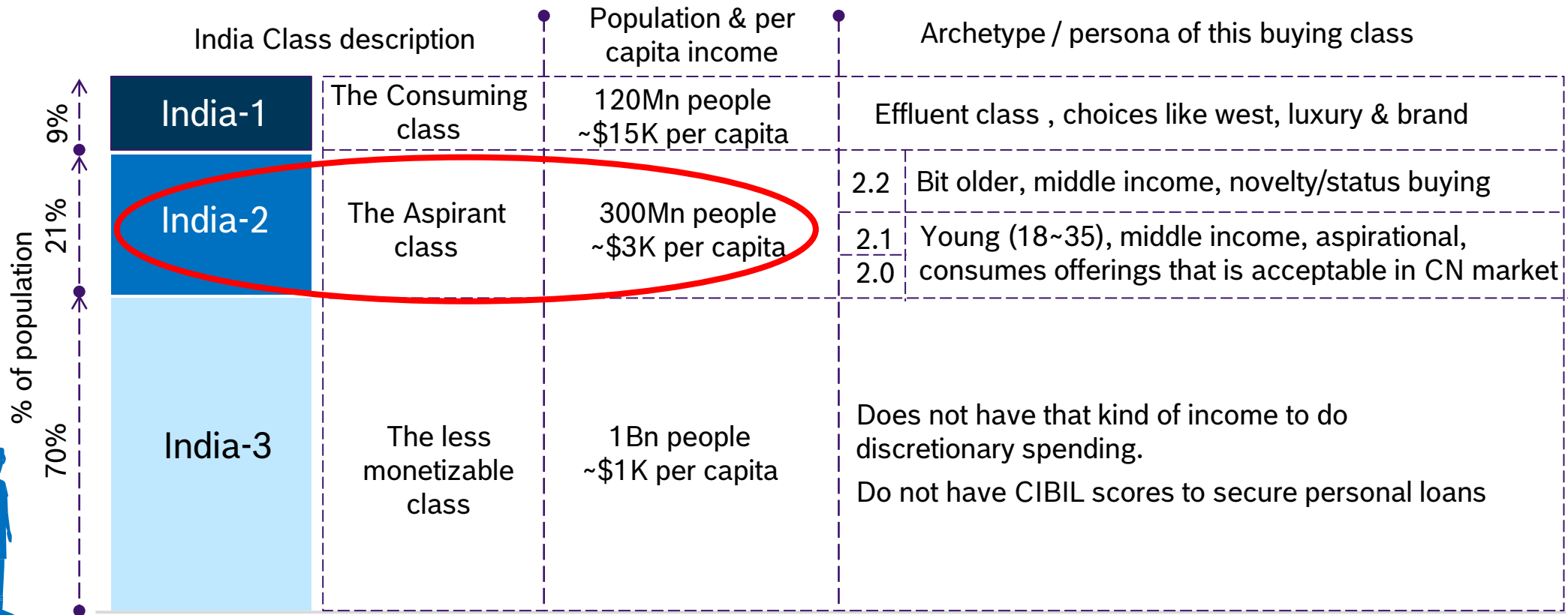
Data based monetization & feature augmentation post vehicle sale via SDV journey.

Moving towards sustainable, safe and exciting future

No legal advice - provided for informational purposes strictly on a non-reliance basis.

# Future of Mobility

## India's Consumer Stack – Buying capabilities (current view)



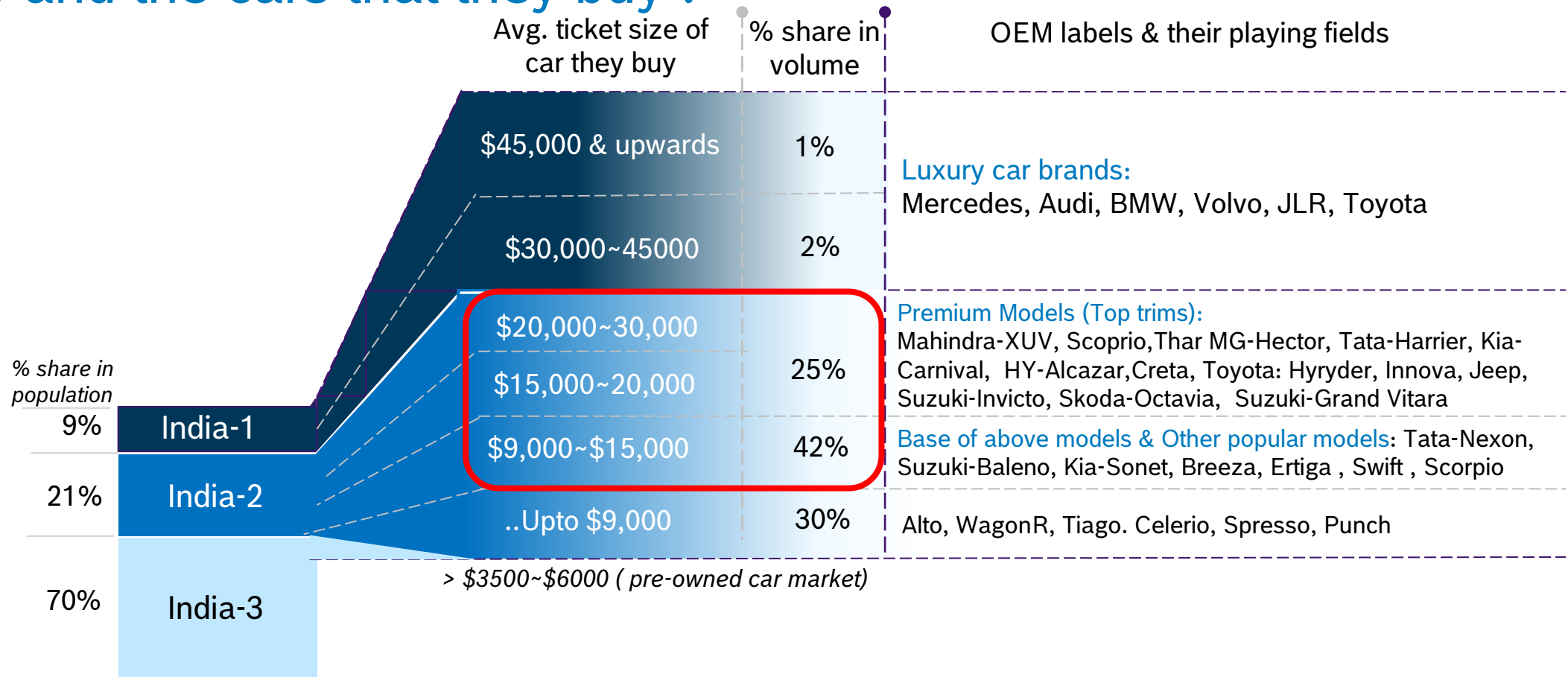
Concept of India Stack, Ref: Kishore Biyani's book, "It Happened in India"

Aspirant class represents majority of the target consumer



# Future of Mobility

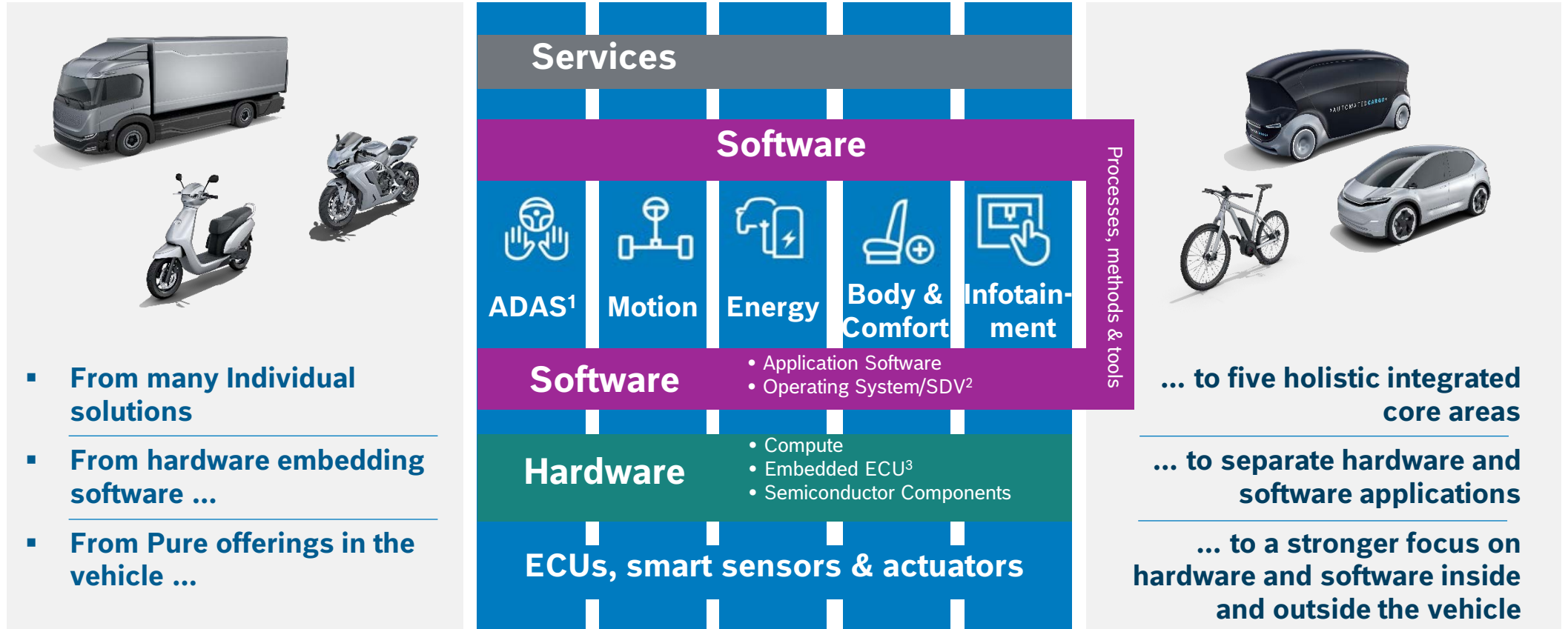
## ... and the cars that they buy !



India 2 population is growing: Premiumization as a trend due to the consumer spread

# Future of Mobility

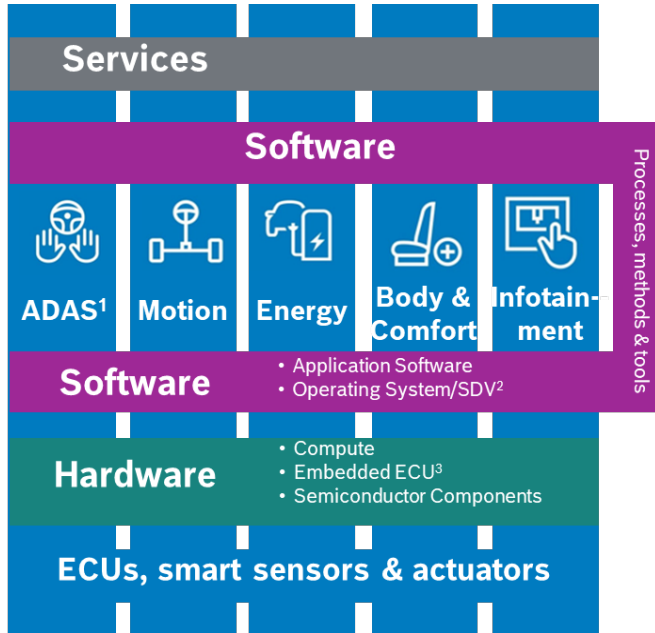
## Market of future calls for new approaches to business– “Tech-stack”



ADAS : Advanced Driver Assistance System SDV : Software Defined Vehicle ECU : Electronic Control Unit

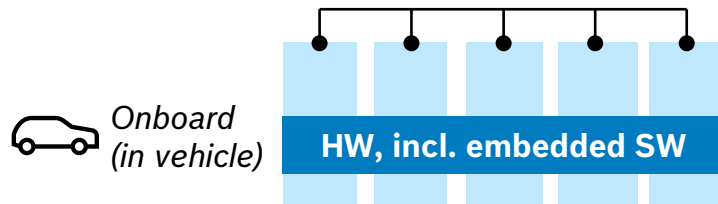
# ... architecture led transition in OEM's

## Tech-stack: the market view

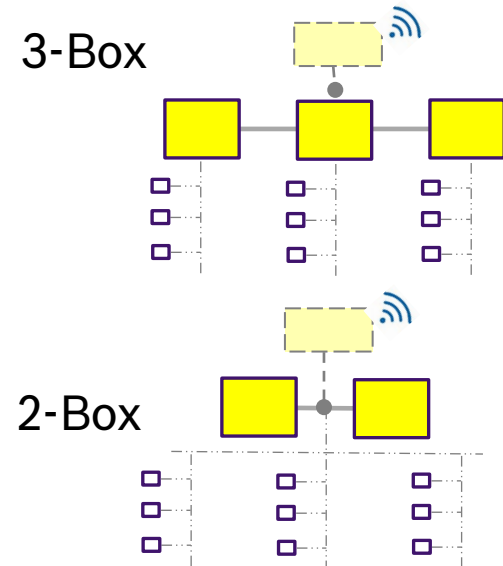
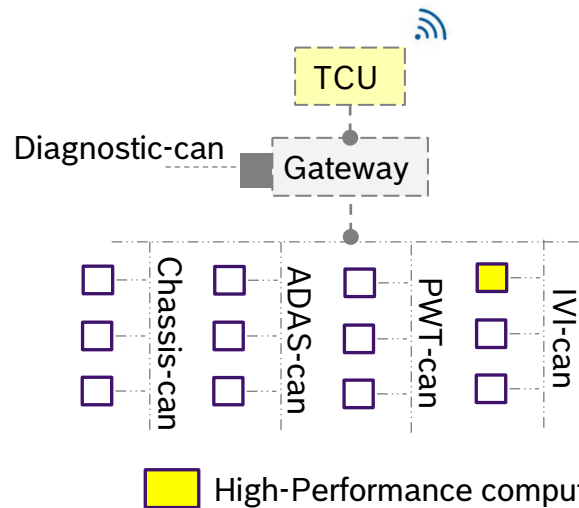
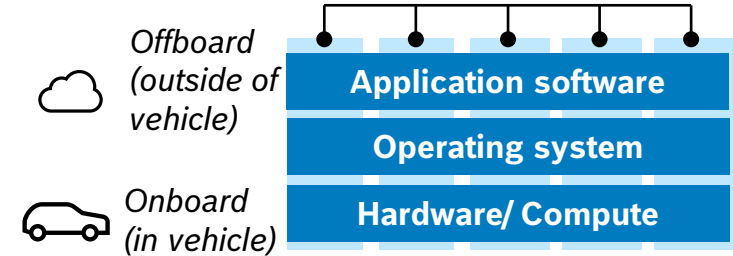


stronger focus on software & hardware, inside & outside the vehicle

so far..



going forward.. ~2027+



# Future of Mobility

## Emerging mobility trends in India: “No more just an owner-based segment”

### Changing Paradigm of urban mobility

### Mobility as a Service (MaaS)

### Electrification

### Technology

People Mobility

OVER CROWDING    TRAFFIC CONGESTIONS    HIGHER VEHICLE COST

RISE IN AIR POLLUTION    PARKING ISSUES    INCREASED TRANSIT TIME

Urbanization in India    **2030**  
40%

**Shared Mobility**  
Share use of vehicle on need basis

**Ride Hailing<sup>(1)</sup>**  
OLA, Uber, Rapido, BLU, mytaxiindia

**Ride Sharing<sup>(2)</sup>**  
BLU, OLASHARE, UberPool

**Subscription**  
Ownership of vehicle through rentals or subscriptions

**Self Drive<sup>(3)</sup>**  
Zoomcar, INOV CARZ, revv, quicklyz

**OEM Subscription<sup>(4)</sup>**  
MARUTI SUZUKI, TOYOTA, MG

OLA, Ather, OKINAWA, REVOLT, TVS, BAJAJ

KINETIC GREEN, Mahindra electric

ERISHA, LOHIA, ATUL

TATA, MG

KIA, HYUNDAI

ASHOK LEYLAND, JBM, SWITCH, TATA, EICHER

ADAS

V2X

E/E Arch

Infotainment

SaaS

Goods Mobility

**Change drivers**

Energy Independence

Fleet Optimization

Asset utilization

Competitive Logistic cost

**Logistic and Transportation Services**

**Logistics Aggregators**

DELHIVERY, PORTER, truckola, BLACKBUCK, HIPT, RIVIGO

**Alternate Fuel**

Electric  
Last mile delivery  
TATA, ASHOK LEYLAND, ERISHA

H2-ICE  
TATA, ASHOK LEYLAND

SaaS

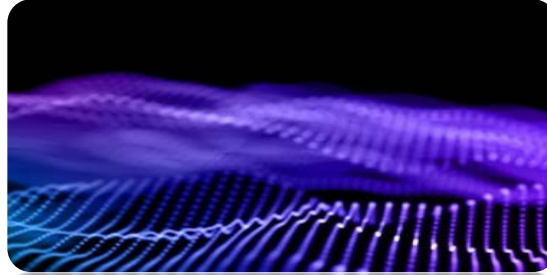
\* 1. Rider hires a vehicle and a driver for personal use | 2. Rider shares the vehicle with other riders travelling | 3. Rider hires a vehicle for personal use for 'self-driving' | 4. Subscription offered by OEMs in partnership with firms

# Future of Mobility Summary



## Who will define the future?

- Regulators
- Consumers
- Stakeholders



## What drives the next gen. tech?

- E & E Architecture
- Compute



## Key factors

- Simple and solid foundation tech
- Cheaper compute
- Gen AI



# Future of Mobility



Thank you!

Guruprasad Mudlapur

Managing Director and Chief Technology Officer, Bosch Limited and President Bosch Group, India  
February 18, 2025