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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, | Dassault Systèmes
SAP D-A-CH |
| ▷ 2005 – 2009: | Partner, Head of Sales, Director, | MHP |
| ▷ 1999 – 2004: | Head of Sales Automotive, Global Account Director , | SAP Germany |
| ▷ 1996 – 1998: | Sales Manager Automotive, | Baan |
| ▷ 1988 – 1995: | Multiple Managing Positions, | Daimler |

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



Germany – Austria - Switzerland

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



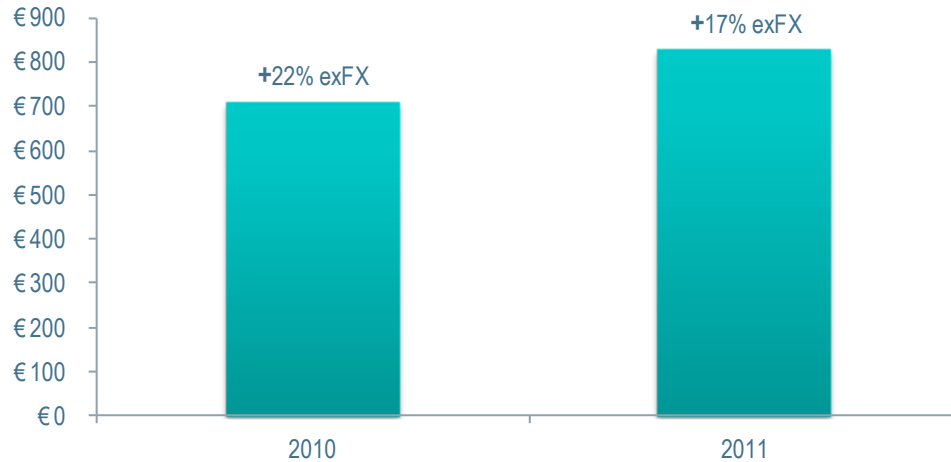
3 3DS in Germany today

- ▶ Key contributor for Europe
- ▶ Customer base
- ▶ Situation in automotive

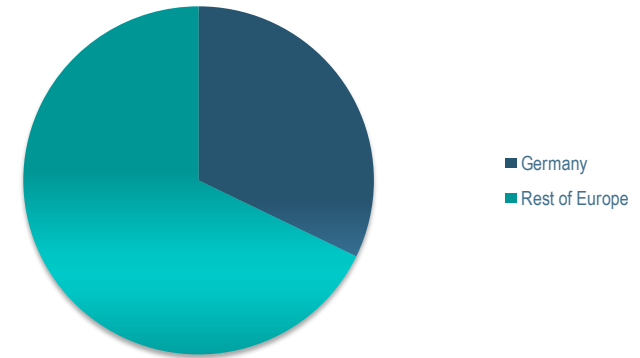
3DS Business in Germany – a Key Contributor for Growth in Europe

in Mio €

Europe Total Revenue



Share of Germany in Europe Software Revenue



- ▶ Strong growth in **Europe** in the past 2 years
- ▶ **Germany** nearly **1/3** of Europe software revenue

Broad Customer Base and Healthy Business

INDUSTRY CATEGORY	Industry
CORE	Transportation & Mobility
	Aerospace & Defense
	Industrial Equipment
GROWTH	High Tech
	Consumer Goods & Retail
EXPAND	Marine & Offshore
	CPG & Retail
	Life Sciences
INVESTIGATE	Energy, Process & Utilities
	AEC (Construction)
	Financial & Business Services

- ▶ 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‘

3DS CATIA
3DS SOLIDWORKS
3DS SIMULIA
3DS DELMIA
3DS ENOVIA
3DS GEOVIA
3DS EXALEAD
3DS NETVIBES
3DS 3DSWYM
3DS 3DVIA



4 Strategy 3DS Germany

► New business fields

Enabler for New Business

“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?



Kunst im Bundestag

Kultur und Politik im Dialog
Der Bundestag ist ein Ort der Kunst und der Kultur
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Sonderthema

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



BASF



s'Oliver



Repower



Meyer Werft



CLAAS



KUKA Systems



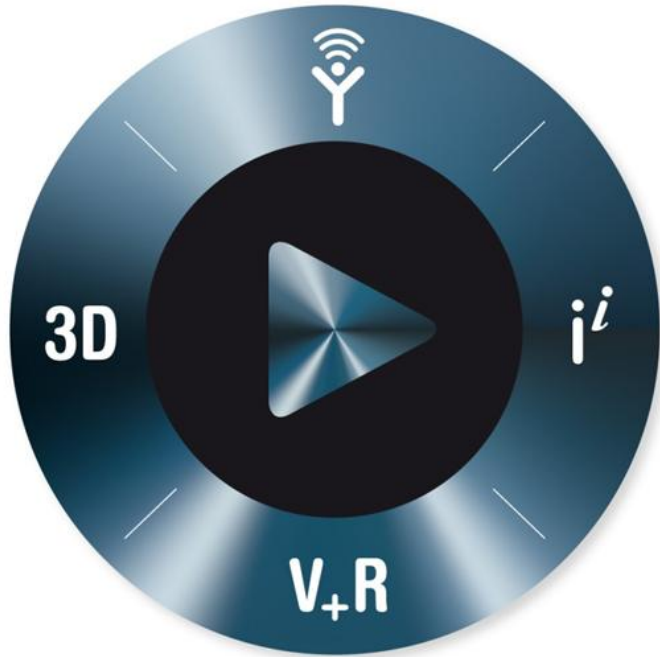
LTA Technology



Märklin

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



3DEXPERIENCE

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

