

Partnering India's Development

Dr. Roland Busch,
Member of the Managing Board of Siemens AG

Siemens at a glance in FY15



Divisions (Revenue in €bn)

Industrial Business									Financial Services
Power and Gas	Wind Power and Renewables	Power Generation Services	Energy Management	Building Technologies	Mobility	Digital Factory	Process Industries and Drives	Health-care (separately managed)	Assets 25
13.2	5.7	Part of PG and WP	11.9	6.0	7.5	10.0	9.9	12.9	

Portfolio



Regional footprint: Partnering with India for about 150 years



Revenue



€1.6bn or INR119bn

Employees



16,000

Manufacturing footprint



22 factories

Research focus



11 centers

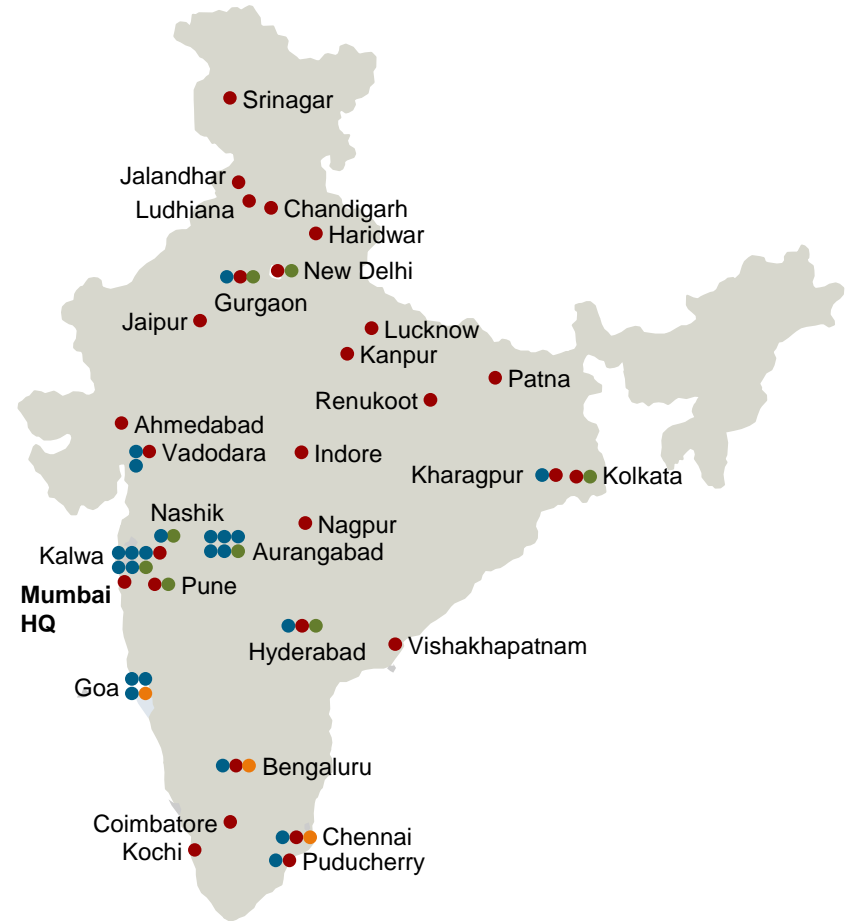
>4,000 R&D employees

Listed locally



~€5.8bn

Market capitalization¹

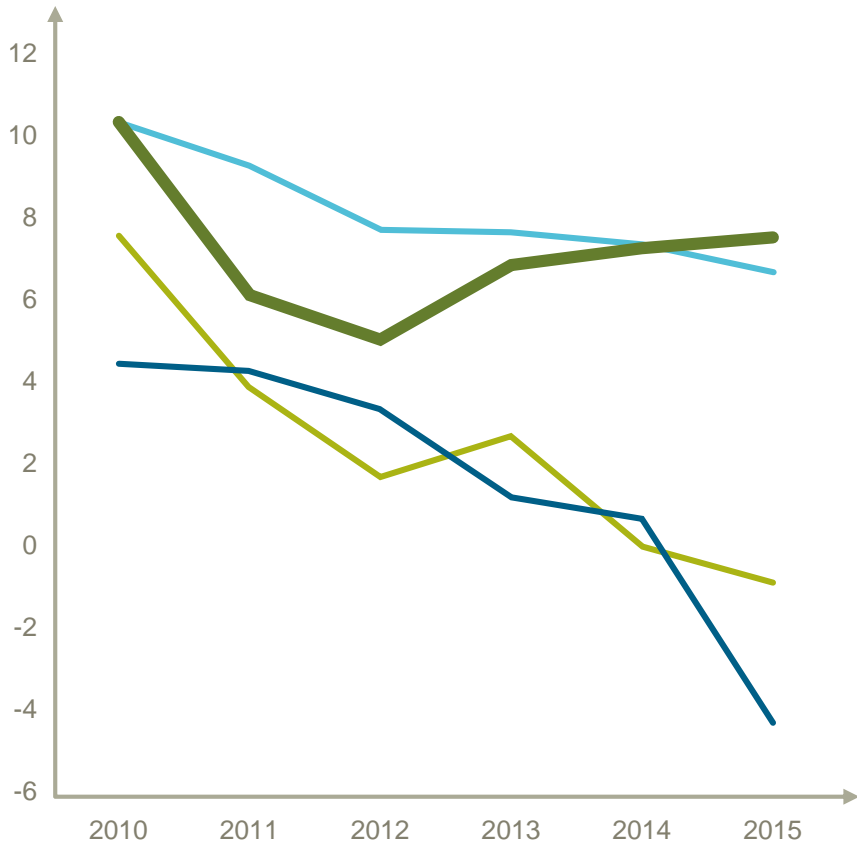


● Factories ● Offices ● R&D Centers

¹ As on May 30, 2016

India remains a bright spot on the economic landscape

GDP growth (in %)



Economy is to grow by the fastest rate of any major country with **7.5%** until 2017

Average economic growth of **10%** is needed to create jobs for the young and growing population

Labor productivity accounted for **>60%** of GDP growth 1990-2012, compared with **91%** in China

Need to remove infrastructure bottlenecks to sustain growth - especially in the energy, transport and water sectors

China India Russia Brazil

**Infrastructure determines competitiveness
and productivity of a city**

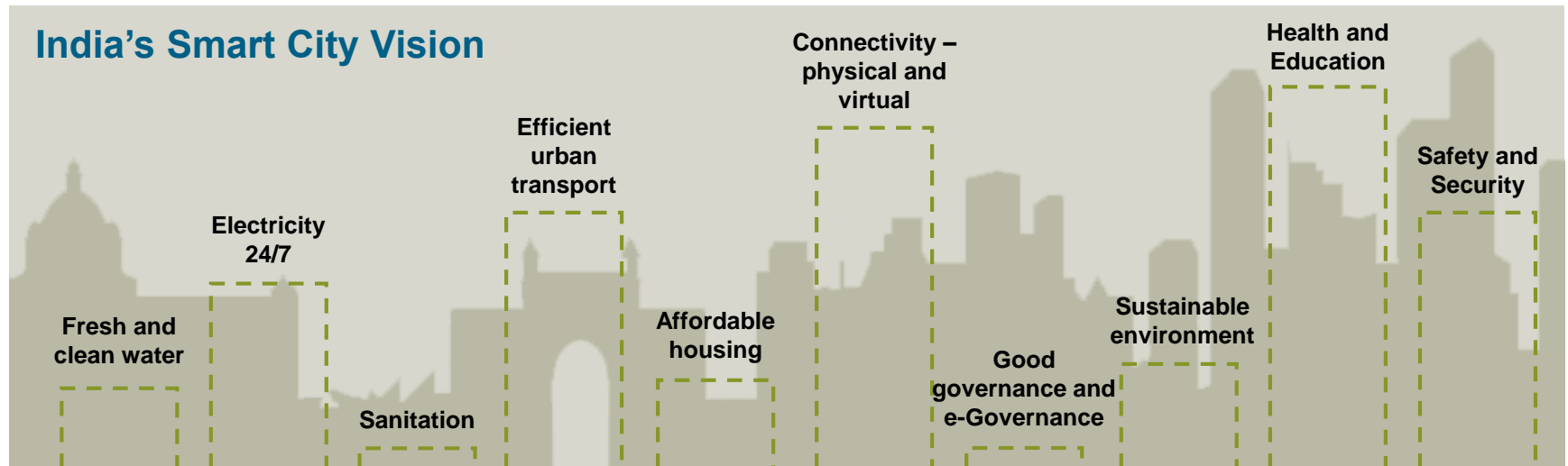
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An aerial 3D rendering of a city's infrastructure. In the foreground, a grey train is on a track next to a blue river. The city is represented by various grey 3D building models. In the background, there's a large body of water with several white wind turbines. The sky is blue with some clouds.

Infrastructure

Delivering India's 100 Smart Cities: Translating the vision into delivery

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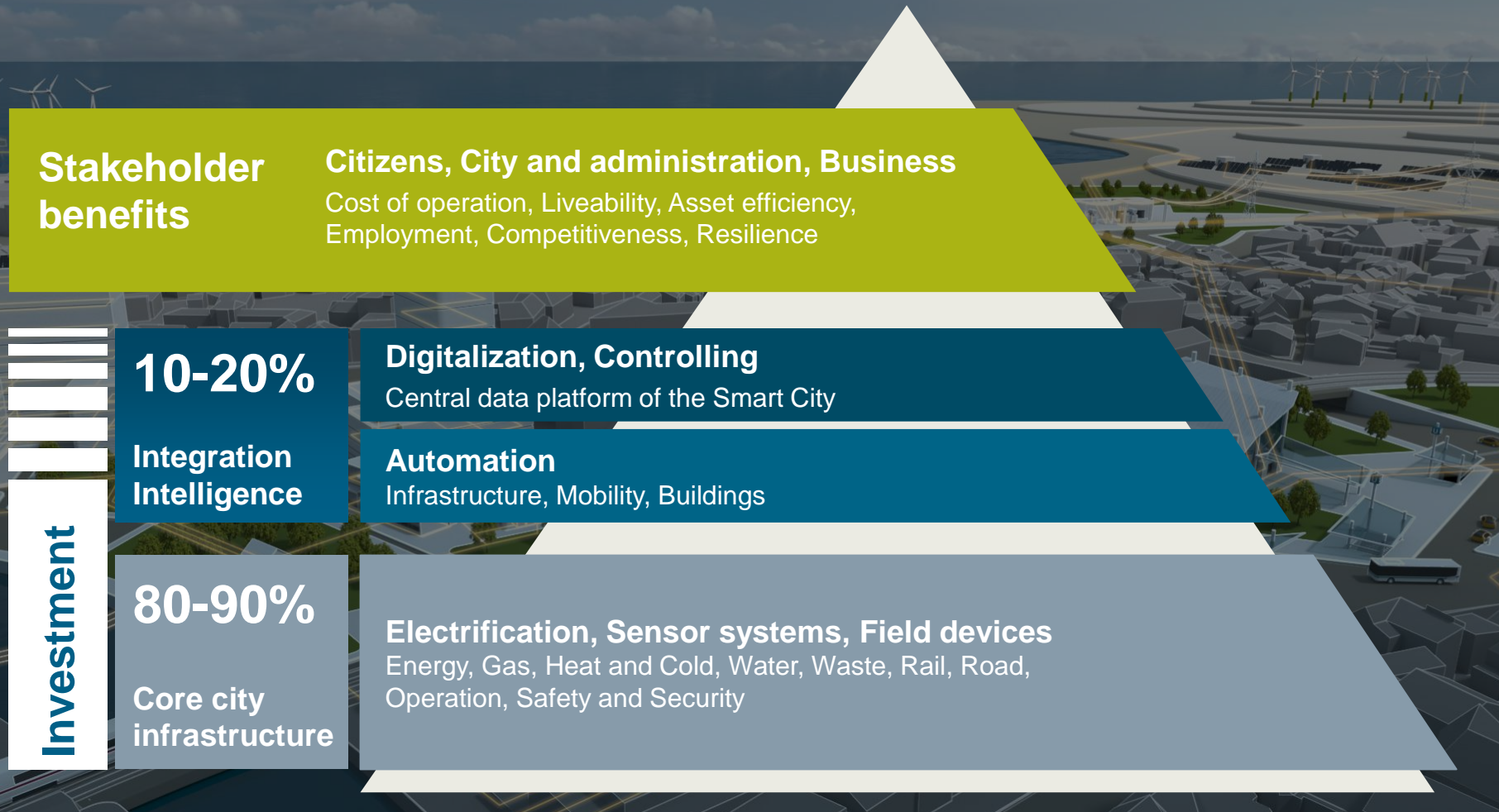
The consortium – led by Siemens

- MoU with Confederation of the Indian Industry to lead a consortium creating a Smart City Vision
- Partners: Atos, Bosch, Deutsche Bank, KfW, Shapoorji Pallonji and VA Tech WABAG,

Benefits of our approach

- Covering all elements of a smart city (energy, waste, transport, water, governance)
- Remain committed to India's future
- Engage as supplier or act as investor/financing
- Leveraging local delivery but also profit from global thinking expertise

Intelligent Infrastructure makes smart cities possible



Intelligent Infrastructure: Benefits and customer stories

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Rolling
stock



Paris

Driverless Metro Lines 1 and 14 increased capacity by up to 50% through trains run at shorter headways

Metro



Gurgaon

Transporting 30k passengers every hour, advanced signaling and automatic train control ensure 90 second headway

Power and
utility grids



Maharashtra

Modernizing electricity grids in 8 cities. Improving reliability, reducing losses (by at least 15%) and a major step towards smart grid

Buildings



Taipei

Building automation for Taipei 101 cuts energy consumption by 30% compared to equivalent buildings

The Mobility Opportunity: Improving urban transport to drive economic growth

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- Transport essential to economic activity and competitiveness
- Infrastructure under increasing pressure: growth in labour force, urbanisation, climate change considerations
- Aging/underdeveloped infrastructure

Key question: What investment into transport infrastructure is needed to gain the most economic benefits?

Outcome: With “best in class” transport conditions cities¹ can gain economic benefit of US\$800bn p.a. from 2030 (1% of global GDP)

¹ Extrapolating from 35 cities in the study to 470 cities with over 750,000 residents

The Mobility Opportunity: Selected investment cases

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- Productivity loss (% of GDP per capita) varies from 9% (Singapore) to 28% (Largos)
- Every city can realize economic benefits by investments into its infrastructure

Paris

Metro extension to realize capacity increase by 20%

~US\$36bn

2015-2030

US\$2.7bn

~10

Beijing

New and extended metro lines to increase capacity by 80%

~\$20bn

2014-2020

US\$0.9bn

~22

Investment
(current \$)

Timescale

Annual value of benefit
(by 2030)

Years to pay back

Sources: Railway Gazette, Railway Technology, UN Urbanisation Statistics, World Bank, Credo research & analysis, China Daily

India's rapid urbanization is an opportunity

Planning and developing smart cities and infrastructure is essential to enable growth of India's economy

Intelligent Infrastructure boosts productivity and efficiency in cities

Siemens is committed to playing a key part in the delivery of India's 100 Smart Cities