

CAPITAL MARKETS DAY 2025



STRATEGIC SECTOR FOCUS

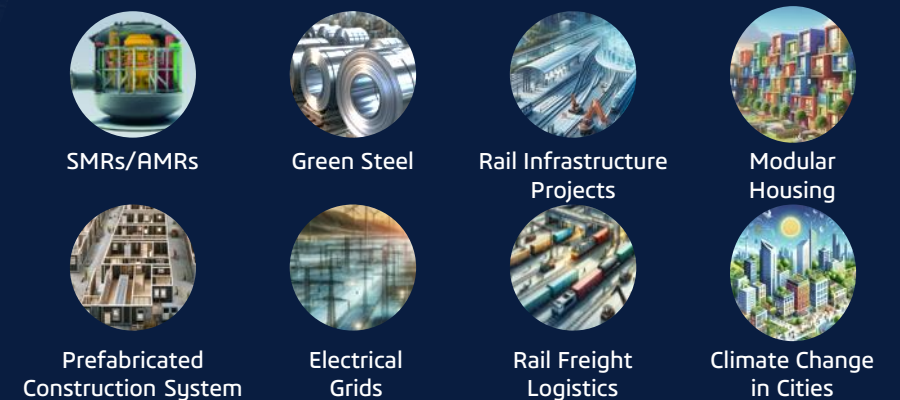
MANUFACTURING INDUSTRIES



LIFE SCIENCES & HEALTHCARE



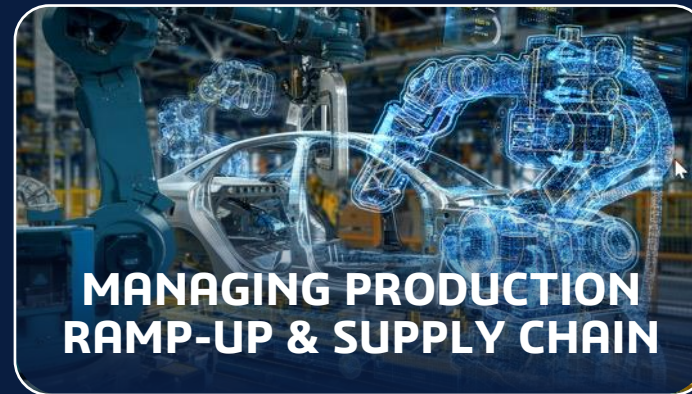
INFRASTRUCTURE & CITIES



TARGETING NEW MARKETS WITH HIGH GROWTH POTENTIAL



CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



Regenerative Enterprise | AIRBUS

We pioneer sustainable aerospace for a safe and united world

Airbus is a global aerospace pioneer, operating in the commercial aircraft, helicopter, defense and space sectors. It has built on its strong European heritage to become truly international.



180

Operations worldwide

150,000

Employees

€69 bn

2024 revenues

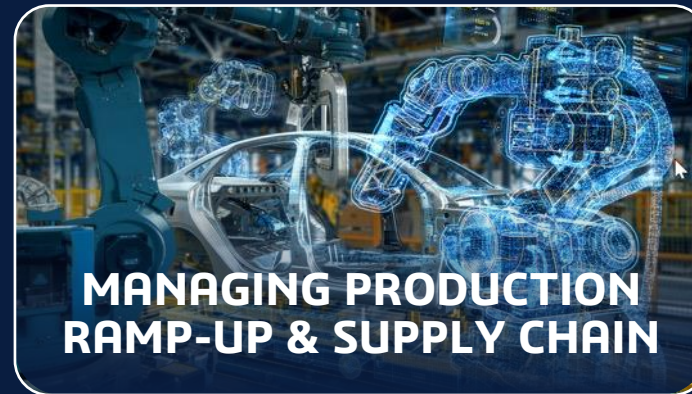
4.5 bn

Passengers/year

© 2025 Airbus

AIRBUS

CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



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THOMAS **KAMLA**

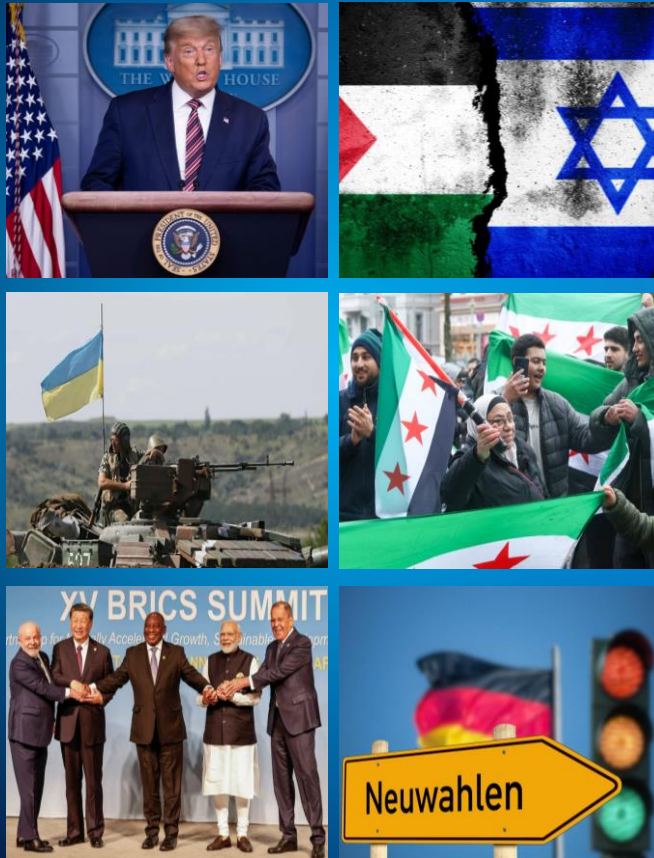
Senior Vice President and CTO
ID.1, MQB Classic, Touareg
Cooperation projects, Digitalization

Volkswagen AG

Decoupling of markets and new competitors



Geopolitics



Deindustrialization of Germany



Automobile



NEV market China 2024

Overall growth



VW shares

+41%

≤3%

Enabler

PLM Solution

Introducing Dassault Systèmes 3DEXPERIENCE as the leading enterprise solution with maximum usability and compatibility for the Volkswagen Group tools.



New
Partnership
established
2025

Up to

6

Months
shorter PDP*

Up to

2000

Million €
cost reduction p.a.*

* PDP: Product Development Process - External benchmark

AI supported



ALM Platform

Requirements

Verification

Architecture

PLM Platform



Product Structure

Vehicle Configuration

Product Planning

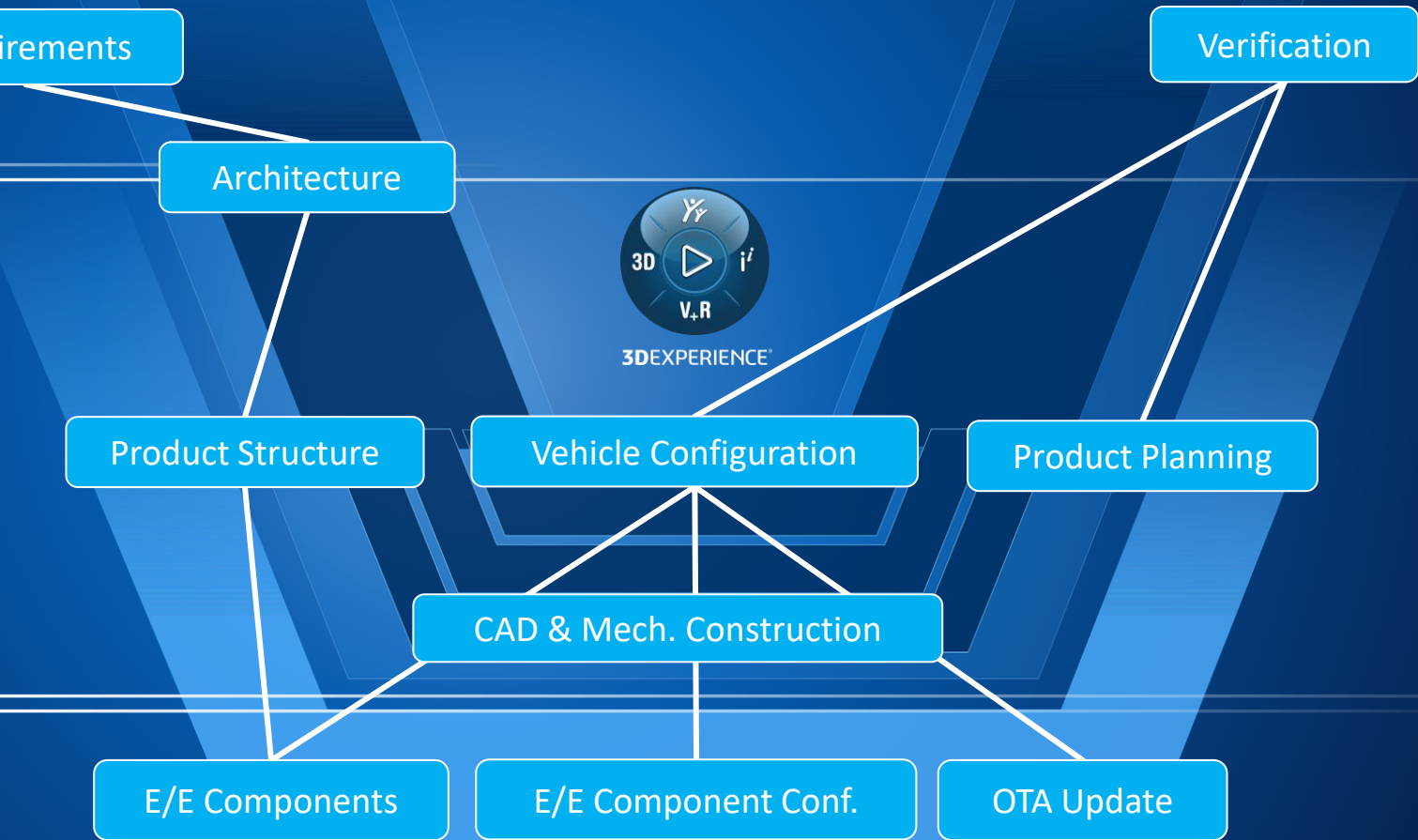
CAD & Mech. Construction

Data Backbone

E/E Components

E/E Component Conf.

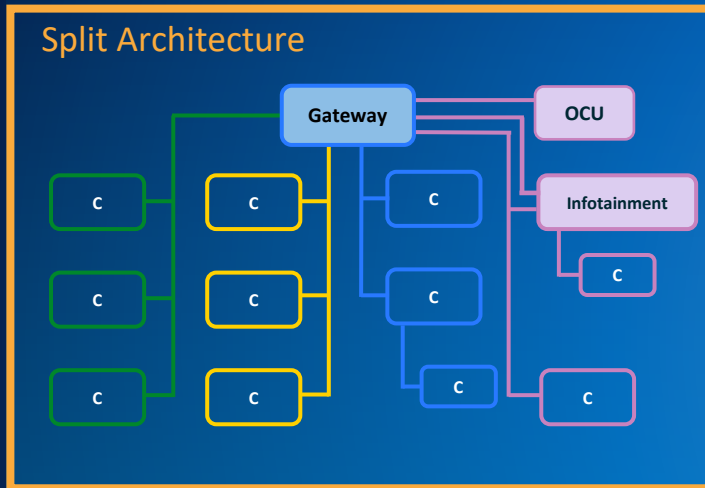
OTA Update



SDV Architecture evolution



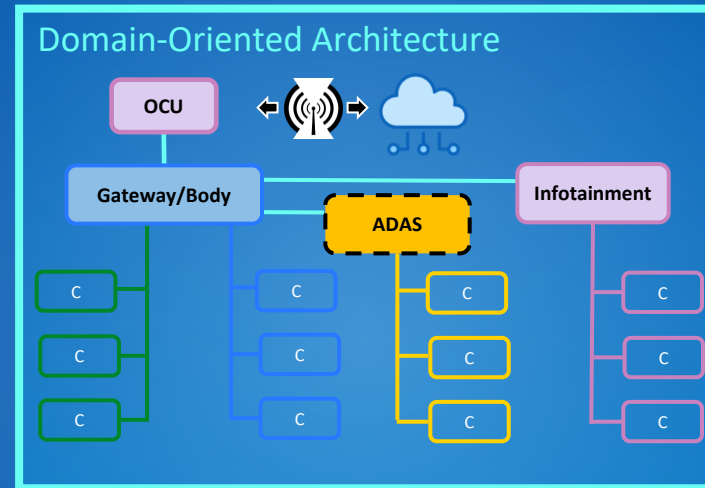
~ 2010



Σ : Gateway network

- ▶ Hardware & software are closely linked - Embedded SW
- ▶ Low centralization of functions

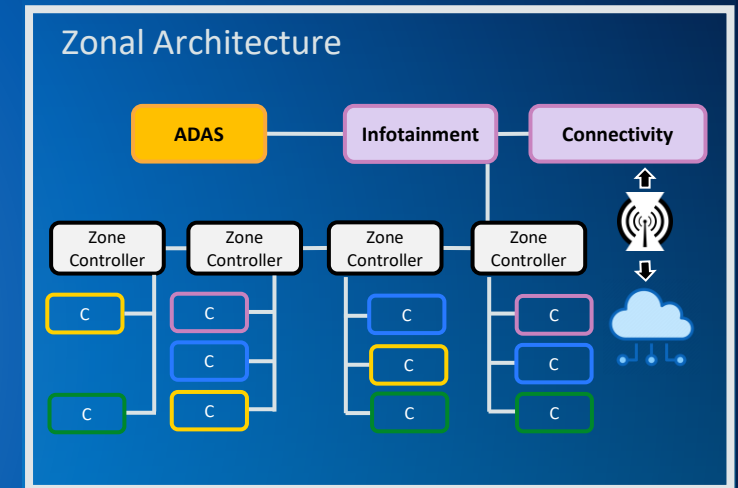
~ 2019



Σ : Domain controller

- ▶ Power increase
- ▶ Introduction of OTA
- ▶ Decoupling hardware & software
- ▶ Functions located in domains

SDV zonal approach



Σ : Zonal controller

- ▶ Fewer control units
- ▶ update/upgrade capability
- ▶ Scalability via segments

c = components like actuators / sensors



New „Normal“





Customer Defined Vehicles

Powered by  DASSAULT
SYSTEMES

Future-proof Process Methods & Tools



Past



No changes after distribution. Paper Documentation.



Today and Future + KBA requirement



Continuous adaptation of the vehicle after delivery through over-the-air updates.



Documentation of all configurations (e.g. hardware and software versions used) for **15 years**.



3DEXPERIENCE

Dassault Systèmes – VW partnership contributes to overarching targets



PDP-shortening:
Enabler for PDP <36month



Quality increase:
Faster maturity realization



Cost decrease:
Ambition > 200 Mio. EUR p.a.

Core initiatives

- 1 **Systems Engineering:** Efficiency increase & managing complexity via function-oriented product development
- 2 **Product and production design:** Embedded AI & simulation in one integrated product development process
- 3 **Digital Thread:** 100% traceability & consistent vehicle data along entire product lifecycle
- 4 **Standard/Continuity:** Reduction to 5 integrated platforms with IT-supplier best practices
- 5 **Standards & regulation requirements:** Efficient realization of standards & compliance to regulatory requirements (ESG)

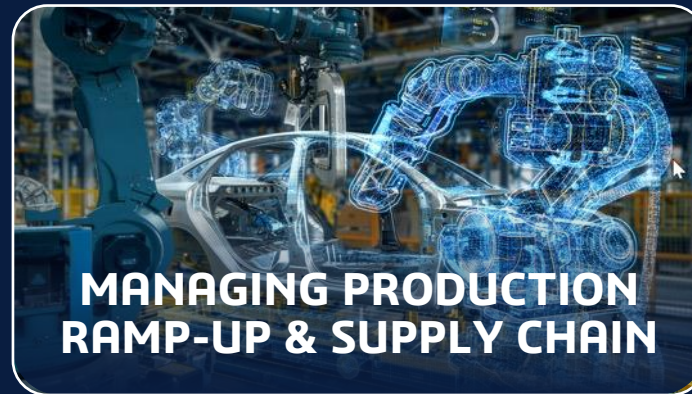
Shaping the future. Together.



3D UNIVERSES



CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



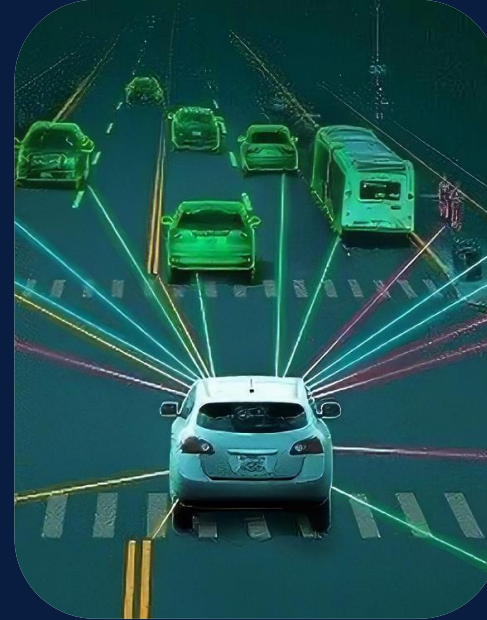
INDUSTRIAL OPERATION 3D UNIVERSES TO MEET MARKET CHALLENGE



**WORKFORCE
OF THE FUTURE**



**SUPPLY CHAIN
DISRUPTION**



**PRODUCT
COMPLEXITY
& DIVERSITY**



SUSTAINABILITY

UNIQUE VALUE | VIRTUAL TWIN EXPERIENCES FOR INDUSTRIAL OPERATIONS



REVEAL POSSIBILITIES

MODELING + SIMULATION + OPTIMIZATION



Value Network



Factories, Assets, Logistics,
Warehouses, Service Centers



Products, Operations,
Processes

DRIVE EXECUTION

DATA + ML+ AI with
PRACTICAL KNOWLEDGE



COLLABORATE UNIVERSALLY

VISIBILITY + AUGMENTED + CONTEXTUALIZED

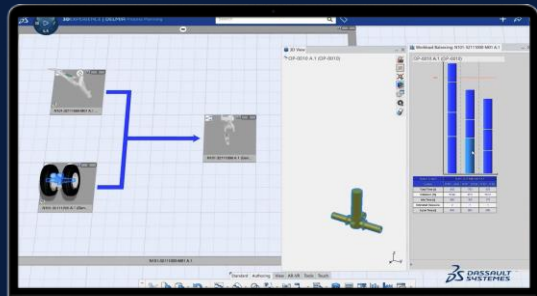


Transform & Deliver Sustainable Performance

TOWARDS SUSTAINABLE INDUSTRIAL OPERATIONS

DASSAULT SYSTÈMES IS UNIQUELY POSITIONED TO BREAK FUNCTIONAL SILOS AND ORCHESTRATE END-TO-END PERFORMANCE

Market multiplier



From 3D PLM

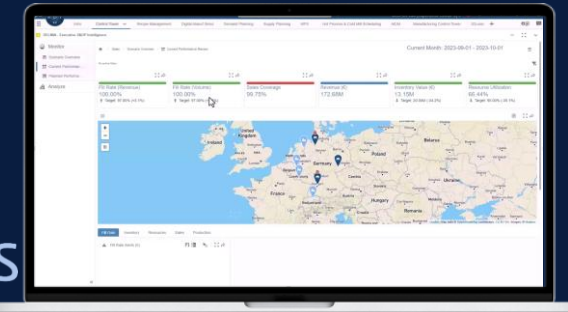
Production Systems

Virtual Twin



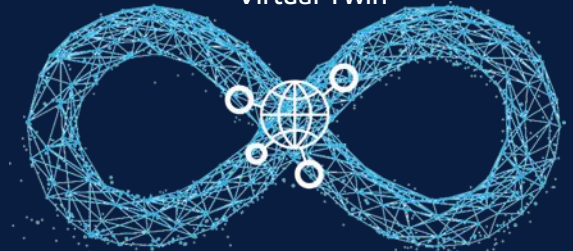
Site Layout | Machines
| Labor Performance | Maintenance

To 3D UNIVERSES



Supply Chain

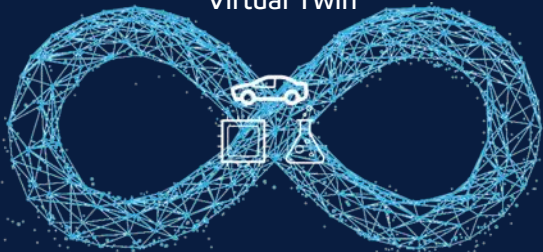
Virtual Twin



Channels | Suppliers | Transportation
| Capacities | Plants | Costs

Product

Virtual Twin



Work Instructions | BOM's | Portfolio Plan
Resources | Bill of Process



SENSE COMPUTING FOR TOTAL QUALITY

DASSAULT SYSTÈMES IS UNIQUELY POSITIONED TO BREAK FUNCTIONAL SILOS AND ORCHESTRATE END-TO-END PERFORMANCE

Product

Virtual Twin



Work Instructions | BOM's | Portfolio
Plan Resources | Bill of Process

Quality Control Efficiency



Production Systems

Virtual Twin



Site Layout | Machines | Labor
Performance | Maintenance



VIRTUAL
TWIN



GENERATIVE
EXPERIENCE



SENSE
COMPUTING



KNOWLEDGE &
KNOW-HOW PLATFORM

CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



L&T ENERGY - HYDROCARBON : BUSINESS VERTICALS

ONSHORE



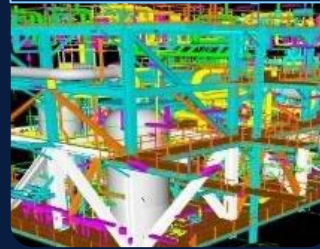
OFFSHORE



**MODULAR
FABRICATION**



**ADVENT
ENGINEERING
SERVICES**



**ASSET
MANAGEMENT
SERVICES**



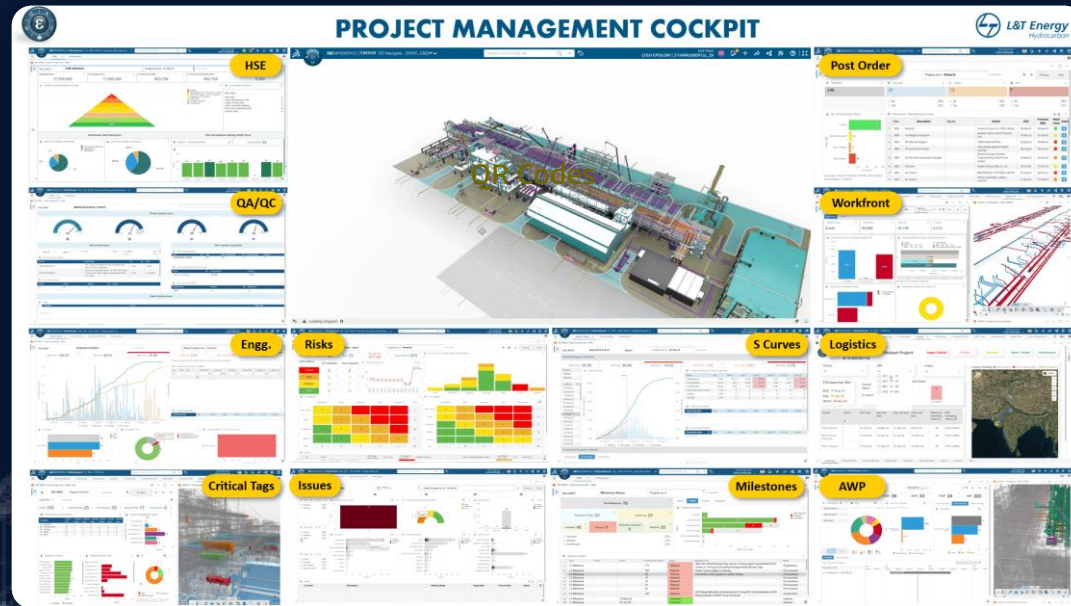
**OFFSHORE
WIND
EPC PROJECTS**



600 + projects (150+ Projects in International)

2800+ Design Engineers | 7400+ Staff | ~30,000 Manpower in Yards & Sites

- 3D Model
- Document Management
- Material Management
- Construction Management
- Completions Management
- HSE
- Schedule
- Cost



- RFID
- Drones
- Photo 360
- Lidar
- CCTV
- RPA

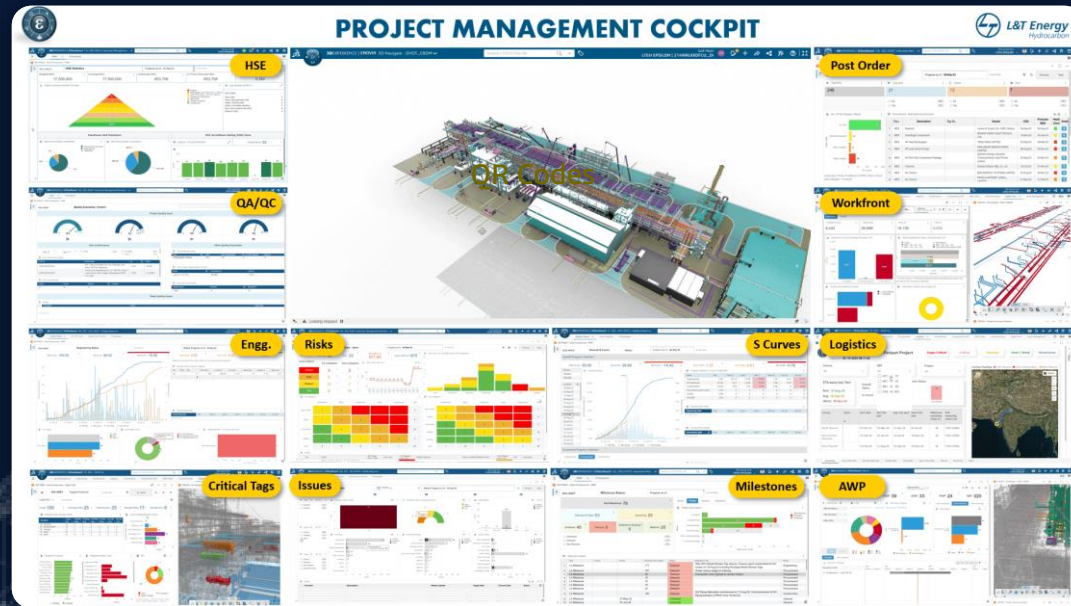


IT SYSTEM DATA



FIELD DATA

- 3D Model
- Document Management
- Material Management
- Construction Management
- Completions Management
- HSE
- Schedule
- Cost



- RFID
- Drones
- Photo 360
- Lidar
- CCTV
- RPA



IT SYSTEM DATA



FIELD DATA



Michelle **TILLEY**

Safety & Schedule Assurance Executive Director Digital Director

EDF Hinkley Point C

CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH





CECILE BELIOT

CEO

BEL GROUP

PROVIDE A HEALTHIER AND MORE
SUSTAINABLE FOOD FOR ALL



OUR AMBITION: PIONEER A NEW FOOD MODEL TO FEED 10 Mi people

FOOD INEQUALITIES
MALNUTRITION & OBESITY



FOOD
WASTE



MASSIVE IMPACT ON
CLIMATE & BIODIVERSITY



**IT MUST
CHANGE**



OUR DNA – A french family owned company

LÉon BEL
FOUNDER



160 years – french family owned



A UNIQUE HEALTHY & PLAYFUL PORTION of goodness



3 segments: Dairy, Fruit and Plant-based



One mission: provide a healthier and more sustainable food for all



A 2-LEGS MODEL: PERFORMANCE WITHOUT SUSTAINABILITY HAS NO FUTURE
SUSTAINABILITY WITHOUT PERFORMANCE HAS NO IMPACT



we EXPLORe THE future of FOOD IN OPEN-INNOVATION MODE



PLANT-BASED PROTEINS



PRECISION FERMENTATION PROTEINS



BIOMASS PROTEINS

Avril
bpifrance

LALLEMAND
Protial
La bonne formule

**STANDING
OVATION**

**SUPERBREWED
FOOD**

 **ARBIOM**

through strategic partnership to accelerate "TECH FOR GOOD"



A worldwide leader in Agrifood Transformation



A worldwide leader in Digital Transformation

*Both French leaders
Ambitioning positive impact*



A strategic partnership to accelerate "TECH FOR GOOD"

MANUFACTURING Exécution system (MES)



- An ambitious digitalisation program within 11 factories
- Objectives: reduce raw mat consumption and stocks, improve production efficiency
- A tech and human empowerment transformation for 4 500 people
- Deployment of a full Manufacturing Exécution System: production, maintenance, quality

Mid-May:
MES Babybel first Pilot
go live at the Evron Factory

Jointly pioneering new technologies

Ai-driven product & pack design: “olympé”



- **Data modeling tool to formulate new products** (recipe & process)
- **Enhance product liking by consumers:** processability, organoleptic targets, sensory perception
- **Acceleration in time to market** for innovation and renovation
- Increase in **development performance**
- **Reduction in the cost of innovation**

**Partnership with DS/Biovia to develop a
Virtual Twin on The Laughing Cow**

Collaborating to invent the future of food



CRITICAL INDUSTRY CHALLENGES: OPPORTUNITY FOR GROWTH



Software Defined Vehicles



Autonomous Vehicles



Batteries

ADDRESSING MOBILITY CHALLENGES
Enhance residual value
& reduce development cycle time

MANAGING PRODUCTION RAMP-UP & SUPPLY CHAIN



Alternative Food



Commercial Aircraft



Advanced Therapies



Molecular Therapies



Data Centers



SMRs /AMRs



Electrical Grids

DEPLOYING SOVEREIGN INFRASTRUCTURE

ACCELERATING RESEARCH INNOVATION IN NEW INDUSTRY VERTICALS



Alternative Food



Advanced Therapies



Cellular Network



Military Aircraft



Perfume & Cosmetics



Chemicals