

SFS Americas Learning Academy SI Higher Education Lunch & Learn

The background of the slide features a silhouette of two people standing on a rocky mountain peak. One person is holding a flagpole with a flag, and both are raising their arms in a celebratory gesture. The scene is set against a sky with soft, orange and blue hues, suggesting a sunrise or sunset.

SI Education Vertical Markets
March 27, 2025

U.S. Education Vertical Markets Team



ED VM Head

Fred James
Education Market Head



Bus Development

Matthew Hamilton
Education Business
Development Manager



Marketing

Karen Sanchez
K12 & Higher Ed Market
Manager



Communications

Lynn Boyce Campbell
Education Communications
Manager



**Partnership
Programs**

Steve Hoiberg
Director of Empower

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Education Vertical Markets Characterization

	Higher Ed	K-12 Schools
Addressable market size & growth outlook	\$3.8 billion 4.2% FY25 5.2% FY25-29	\$6.0 billion 6.0% FY25 6.2% FY25-29
SI OI (OOM, incl. HE Lab Projects & Brightly) and 3-year CAGR (FY22-FY24)	~\$500M 11.5%	~\$300M 6.4%
EIS FY25 FC	\$42M (+13% YoY)	\$59M (+13% YoY)
Siemens Current Market Focus	- Industry-leading customer base ~2/3 revenue from Top 50 accounts	- Inconsistent SI B focus (<25% Areas consider K12 a priority) - Regionally focused market
Market Segmentation – Growth Targets	- Public flagships & Elite privates - HBCUs	- Siemens customer footprint - Population growth regions (SE/SW)
Siemens Market Characterization	- Strategic market - End-customer focused - Significant upside across SI-portfolio	- Commoditized market - Contractor focused - Significant indirect growth potential
Market Challenges	- Account management warranted - Execution complexity	- Commoditized (price-driven) market - Omni-channel strategy needed
SI ED VM Market Outlook	- Strategic VM (priority) - Grow strategic accounts	- Large, under-focused market - Omni-channel strategy needed

Siemens Smart Infrastructure – Sales Channels supported by ED VM

Siemens Smart Infrastructure



SI Buildings sales channels:

- Direct (to customer) Area (Branch) sellers
- Sustainability Business sellers
- Value Added Partners (3rd party sellers of Siemens offerings)

EP and EA sales channel:

- Electrical Infrastructure Sales (EIS) network
- Strategic Contractors (GC, Elec, Mech)

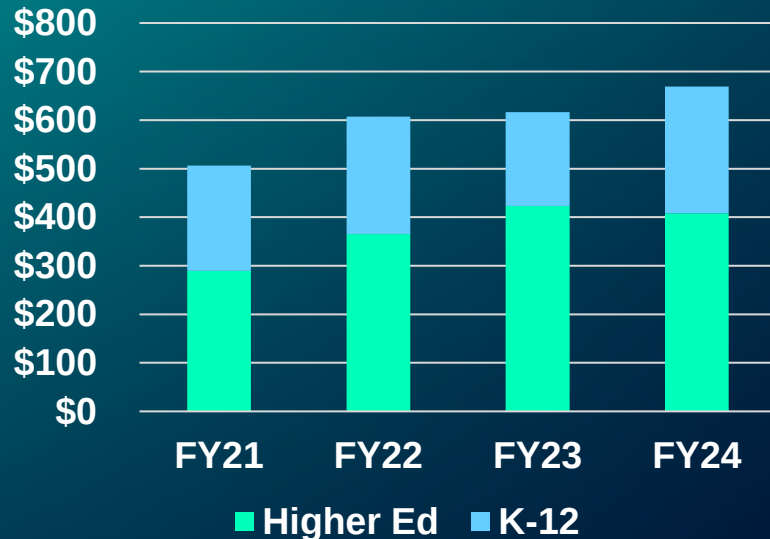
Financial Trends Support Growth Outlook





SI Education Vertical Markets FY21-FY24 Trends and Growth Areas

SI ED VM OI (\$Millions) – U.S.



CAGR (FY21-24)

HE +11.5%

K12 +6.4%

ED +9.3%

Drivers for Growth (FY21-FY24)

1. Post-Covid construction rebound & federal funding
2. Desigo CC migration commitments
3. Increasing priority for safety & security
4. Investments in energy efficiency
5. Services expansion & digital adoption
6. EIS sales

Notable growth across portfolio!

- Overall growth >2x market over 3-year period!
- Automation Solutions +8.5% CAGR since FY22
- Fire & Security now contributing > \$110M OI in FY24
 - Fire +18% 2-yr CAGR
 - Security +35% in FY24
- 25% of FY24 ED SI B Area business digitally driven!
- Mechanical has doubled from \$10.6M in FY22 to \$22.7M in FY24 (CAGR = 46%)
- Energy + 37% to \$140M OI in FY24
 - EnS +14% (\$34M)
 - EPS Projects +46% (\$111M)
- Electrical (EIS+ES) +13% in FY24
 - Target \$100M+ in FY25

Major Cross-Segment Higher Ed Successes in FY24



Rowan University: Shreiber School of Vet Med

Early and collaborative engagement with customer, contractors & engineers led to Siemens specifications and trust, yielding:

- \$6.1M BAS and lab controls
- Siemens selection for Fire contract
- X300 connectivity to support Building X
- SU Master Agreement - \$640 Energy Study & Submetering; \$35M projects in development
- \$1.6M EIS win (gear & services)



University of Florida: Holland Law District

Strategic Siemens customer (automation and energy partner):

- \$30M SU ESCO project
- \$1.2M automation (JAX)
- Siemens MGC with new BESS, solar carport and EV
- \$6M lifecycle Services (BAS, DFSS, Mechanical)
- \$184K EIS MCC order



University of Alabama Birmingham: Biomedical & Psychology Building

Long-term Siemens automation customer. Robust account management and collaborative relationship, yielding:

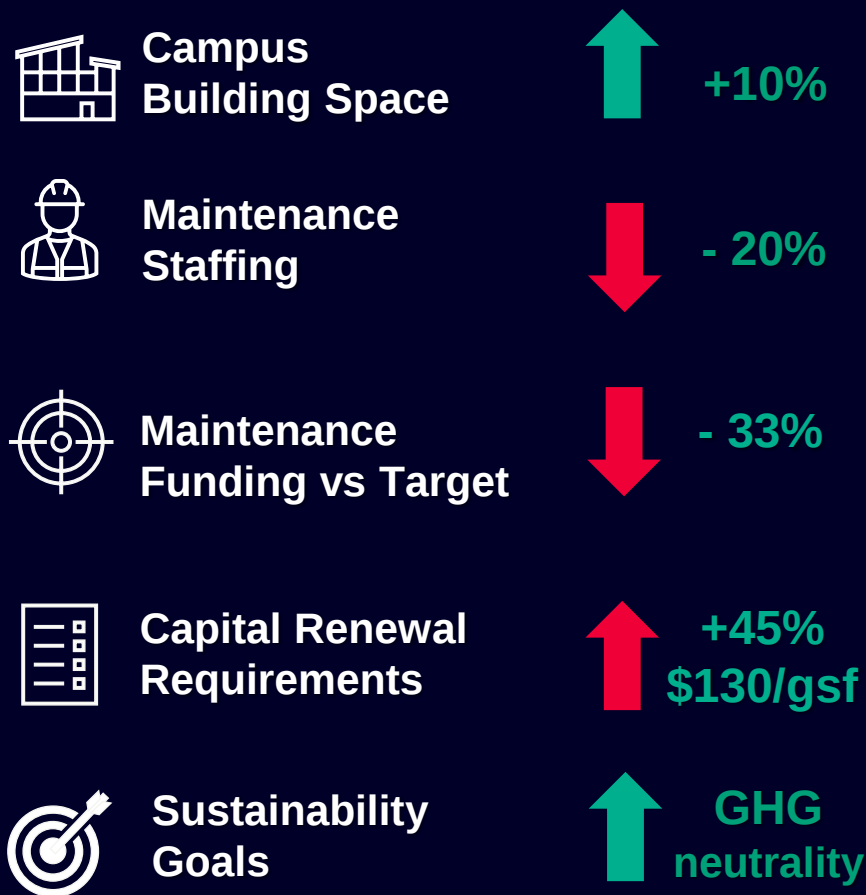
- Multi-segment SI win for new \$190M research building
- \$7.7M Building automation & lab controls
 - Design Automation (BAS, DesCC)
 - Smart Lab (incl. GOLO valves)
- \$570K EIS electrical infrastructure sale



Higher Education Market Landscape

Campus facilities challenges demand a new and digital response

Campus Facilities Trends* (10 yrs)



Conclusions

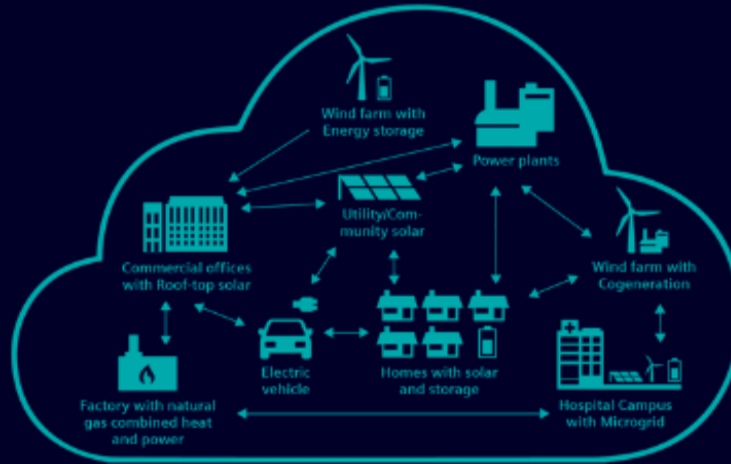
- 1) Traditional approaches to Facilities Management are insufficient and not sustainable.
- 2) Impact of under-maintained campus infrastructure include:
 - Poor performance and high cost of operations
 - Safety and security concerns
 - Negative impact on student recruitment and retention – major C-suite issue given forecasted “enrollment cliff” (-15%) over next decade
- 3) Campuses must leverage powerful new technology and digital solutions to overcome facilities challenges including staffing and budgets constraints.
- 4) Utility systems upgrades needed to address decades of neglect and decarbonization/electrification goals.
 - P3 Energy & Utility Concessions to grow

Source: * Simplified – from Gordian State of Facilities 2024

Addressing these challenges requires a different approach that enables “*Doing more with less*” by leveraging data, technology and partnership



**Investment in Smart
Campus Foundation**



**Embracing Cloud Platforms
(BX), Analytics
& Remote Services**

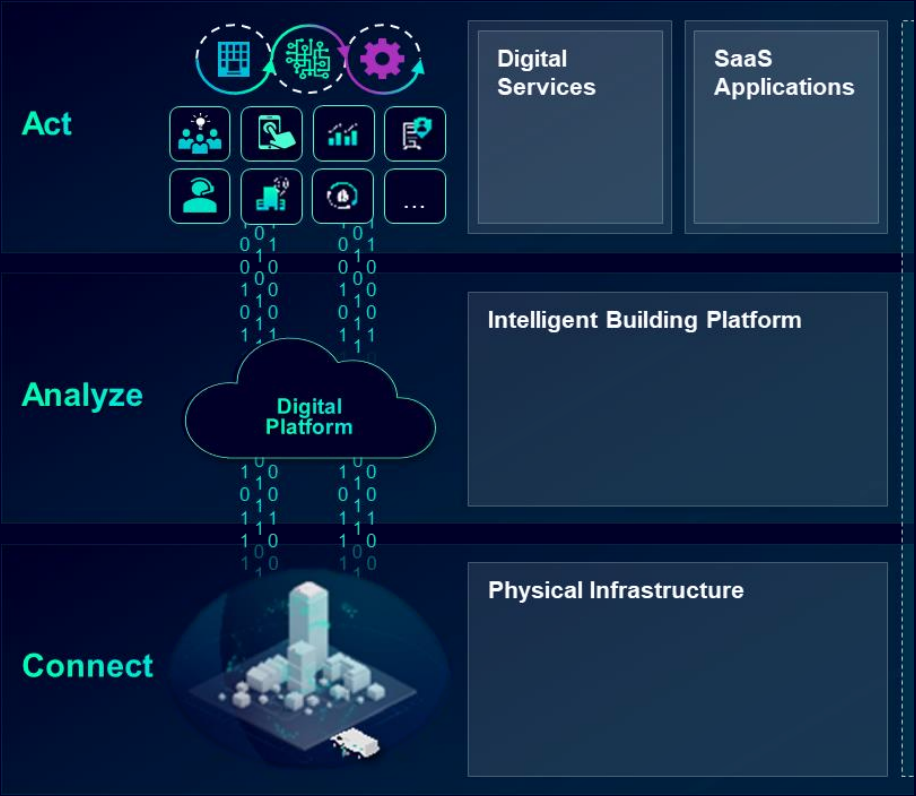


Trusted Partnerships

**Siemens has strategically invested to deliver a differentiated approach:
Desigo Automation + Building X / Digital Services Center + Local Services**

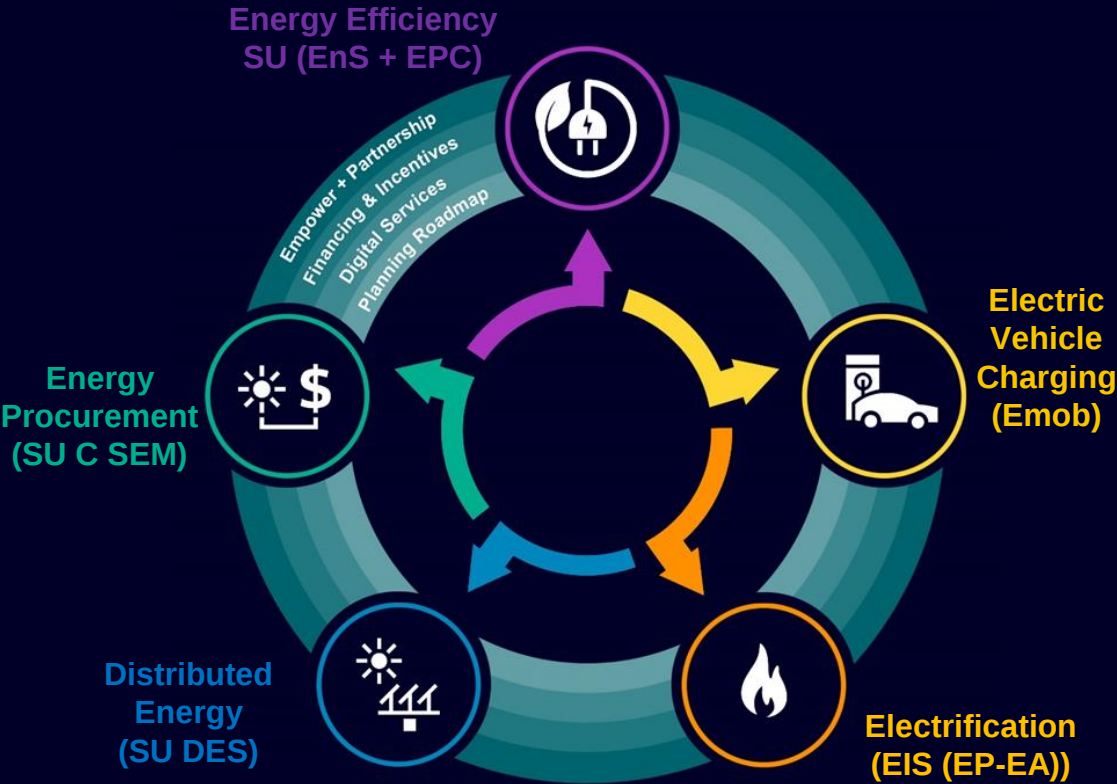
Two primary themes for customer engagement

Digitalization



Lead Offerings: Designo, BX, DSC

Decarbonization



Lead Offerings: Energy Svcs, SU (Advisory, EPC), Elec

Political Landscape - Uncertainty and Headwinds

Funding Uncertainty, Executive Action and Regulatory Changes

Federal Program scrutiny

- Leading to uncertainty & reporting complexities for business offices
- Slowing decarbonization progress
- Affordability = decline in enrollment
- Higher Ed business offices facing slowdown in processing due to layoffs - and possible dismantling of Dept of Ed

Programs include

- Climate and energy (IRA, BIL)
- DEIA (diversity, equity, inclusion and accessibility)
- Foreign assistance or support of activities overseas

Upheaval in FY2025 Federal spending

- Cuts to NSF and NIH will significantly impact university research programs (lab facilities and maintenance allowances)
 - Grants, fellowships
 - Indirect rate reduction (~50% to 15%)
- Loss of tuition revenue if Federal student aid programs are axed (Pell grants, Federal Direct Student Loans, Graduate PLUS, loan forgiveness programs)
- Risk of claw back of IRA incentives: renewable energy systems will halt these types of projects (~30% incentives on solar, battery storage, etc.)

Tax Reform and Higher Ed provisions

Tax Cuts and Jobs Act (TCJA) of 2017 will expire Dec 31, 2025

Students & families may lose: (enrollment declines)

- Lifetime Learning Credit and American Opportunity tax credits
- Scholarship & fellowship income exclusion
- Student loan interest deduction

Institutions could see: (increased costs)

- Endowment tax expansion from 1.4 to 14% (private non-profits)
- Eliminate exclusion of state/local bond interest and tax preference for other bonds
- Eliminate nonprofit status for hospitals & deduction for charitable contributions to health organizations
- Repeal green energy tax credits

Lawmakers may look to provisions in the College Cost Reduction Act

- Risk sharing: schools could be financially responsible for unpaid student loans
- Loan limits + cuts to other programs

Alternative Contracting and Financing Options



Trends and Drivers:

- Preserve limited capital for campus core mission
- Address mounting deferred maintenance
- Shift financial and operational risks to third party partner(s)
- Outsource services to address labor and skills shortages
- Evaluate potential tax benefits

FY25 Higher Ed Go-to-Market & Growth Initiatives

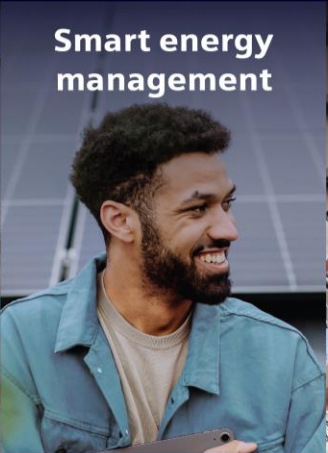


7 Key Higher Ed Focus Areas - supported by Siemens SI Portfolio

Increase
excellence



Students' experience & satisfaction



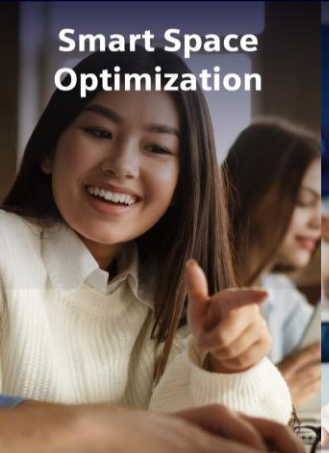
Smart energy management



Campus safety and security



Efficient, predictable campus operations



Smart Space Optimization



Research & teaching excellence



Campus sustainability

Create a supportive, healthy, and inspiring environment for everyone on campus.

Achieve independence, resilience, and emissions abatement with onsite renewable energy.

Proactively ensure safety for people, assets, and buildings while lowering insurance costs.

Ensure maximum system and energy performance throughout the entire life cycle of assets.

Analyze and predict space utilization to optimize physical infrastructure allocation and use.

Create the best possible conditions for faculty and students with a smart, connected campus.

Optimize operations towards maximum energy efficiency and minimum emissions.



Decrease
inefficiencies

SI: Industry leading customer base of strategic HE accounts



Top 50 accounts represent majority of OI and majority of growth potential

Strategic HE account priorities:

- Account & relationship management
- Execute backlog
- Expand portfolio:
 - Digitalization
 - Services
 - Decarbonization
 - Electrification
- Collaboration on university medical facilities with Healthcare VM & Healthineers

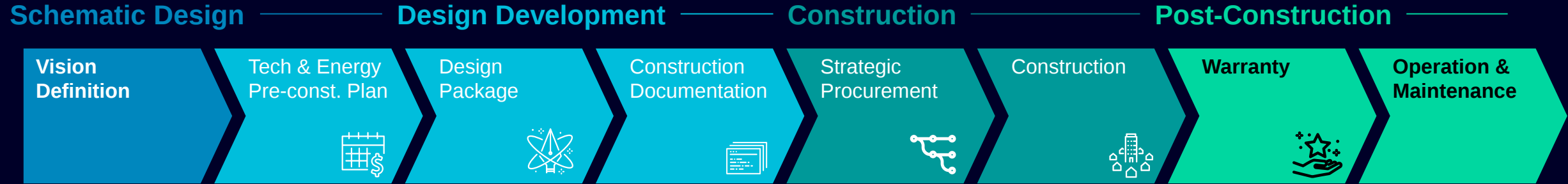
Above represents ~1/2 of our Top 50 accounts.

Key FY25 Projects

University Florida UF Cancer & Genetics Value: ~\$50M Scope: Modernize 2 large lab buildings; CHW Optimization; DES (in discussion) Bus: SU (lead), SIB (Jax), Life Sciences, DES?, EIS? Challenges: JCI, UF Facilities Director, Margin stacking UF VM Role: Exec Relationships (10 yrs), Account Planning/Advisor, Collaboration, Resources, Partnership (Empower+)	University S. Carolina ESPC Phase 2+ Value: ~\$20M (\$100M prog.) Scope: Upgrade campus chillers (incl. SWG); Bldg LED, water CMs, controls upgrades Bus: SU (lead), EnS (DF & DFSS), EIS (SWG) Challenges: JCI automation campus UF VM Role: Exec Relationships (5 yrs), Account Planning/Advisor, Collaboration, Resources, Partnership (Empower + SUS)	Baylor University Utilities P3 Value: >\$100M Scope: 30+ yr DBFOM Concession for campus utilities, ECMs & renewables Bus: SI B AUS (BAS), SU (ECMs & RE), EIS (EP/EA) Partnership: CenTrio, SFS, Burns & McD, Primoris UF VM Role: Partnership lead, Advisor to Siemens team, Proposal support, Resources, Academic Partnership	Rowan University Master Agreement Value: >\$30M (in develop.) Scope: Upgrade campus buildings and utilities; add renewables, electrify Bus: SU(lead), B(PHI), DISW, SEM, EIS (EP/EA), GSW, SFS Challenges: Funding (assessing NJ, EPC, PPA, P3) UF VM Role: Advisor, Collaboration, Resources, Academic Partnership (DISW, Empower+), P3
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Strategic National Design Engineering & General Contractor Accounts

Early Engagement & Present Unified SI Story



SI-B National AEC Focus Account

Chris Pelton (Head)

- Michael White
- Max McLeod
- Marty Skolnick (retired)



EIS Strategic National Accounts

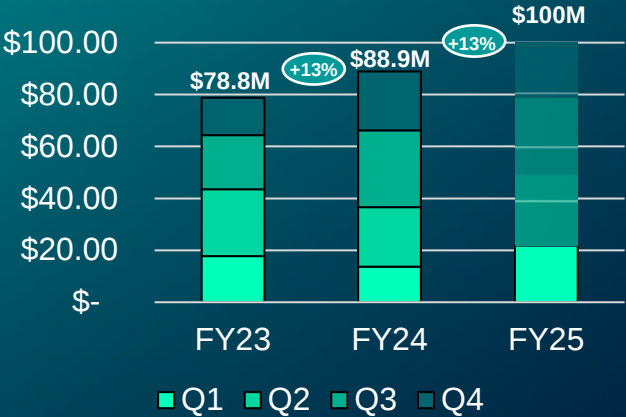
Joe Donato (Head)

- Kevin Rowles (Gilbane, Clayco)
- Chris LoPiano (Turner)
- TBD (Skanska, Mortenson, DPR)

Strategic partnerships with some of the largest national GCs in the ED markets.

Electrical Infrastructure: Strategic Growth Focus

EP/EA - Education OI (\$M USD) – Q1 FY2025



FY25 EP Results Q1

- OI = \$21.8M (+59%)
- Avg. Growth = 36.9%
Over Last 4 Quarters:
Q2,'24 – Q1,'25

FY25 Target = \$100M

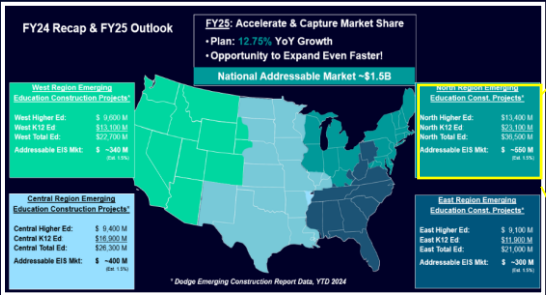
Key Trends and Drivers

- Campus Modernization to attract/ retain students & talent
- Dormitory construction & renovation to attract/ retain
- Strong regional K12 growth due to population shifts
- Expanding electrical capacity to deliver on decarbonization
- Increased in distributed and renewable energy
- Metering & Monitoring in response to NFPA 70B & digitalization
- Laboratory, Housing, Central Plants (upgrades/expansion)

FY24 - Top EIS ED Wins by Region

Region	Customer/ Opportunity	BU	\$OI Value
North	Brown Univ. Life Sciences Bldg. (HE)	EP	\$4.0 M
East	NOVA Southeastern Univ. CUP – GIS (HE)	EA	\$3.8 M
Central	Royse City ISD Fate High School (K12)	EP	\$2.7 M
West	University of Utah School of Medicine (HE)	EP	\$1.3 M

Addressable ED EIS Mkt: \$1.5B (National)

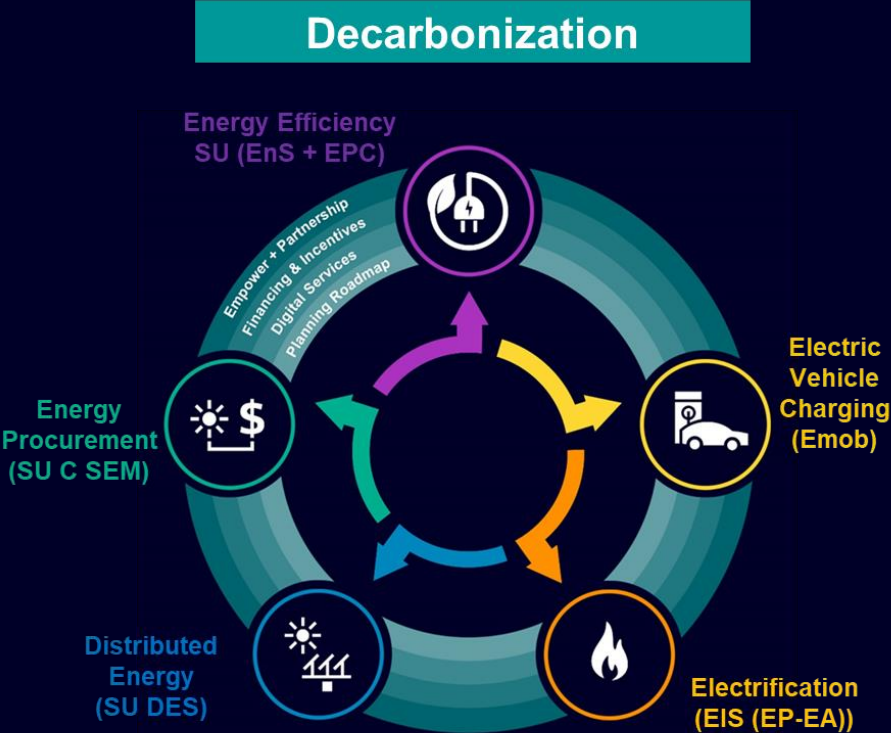
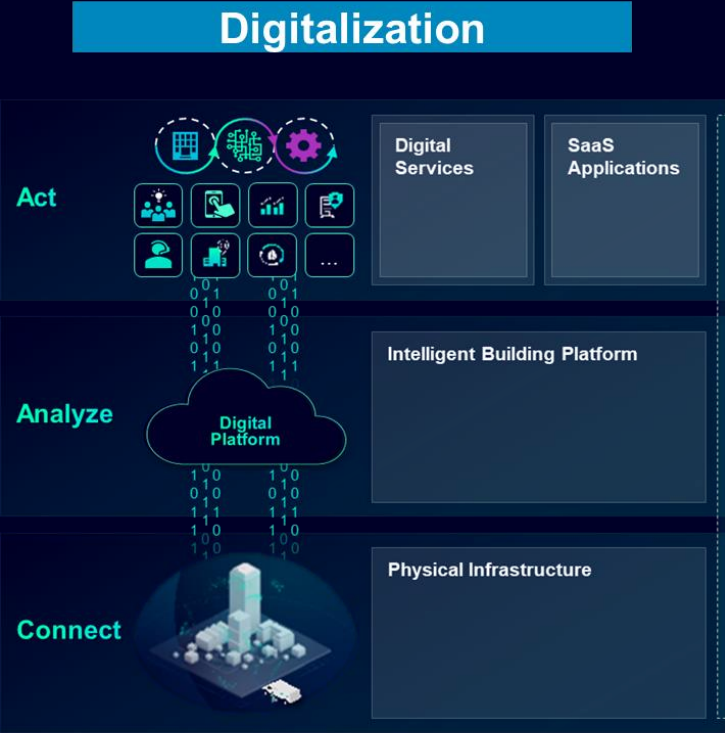


Example: North Region Emerging Education Const. Projects*

- North Higher Ed: \$13,400 M
- North K12 Ed: \$23,100 M
- North Total Ed: \$36,500 M
- Addressable EIS Mkt: \$ ~550 M (Est. 1.5%)

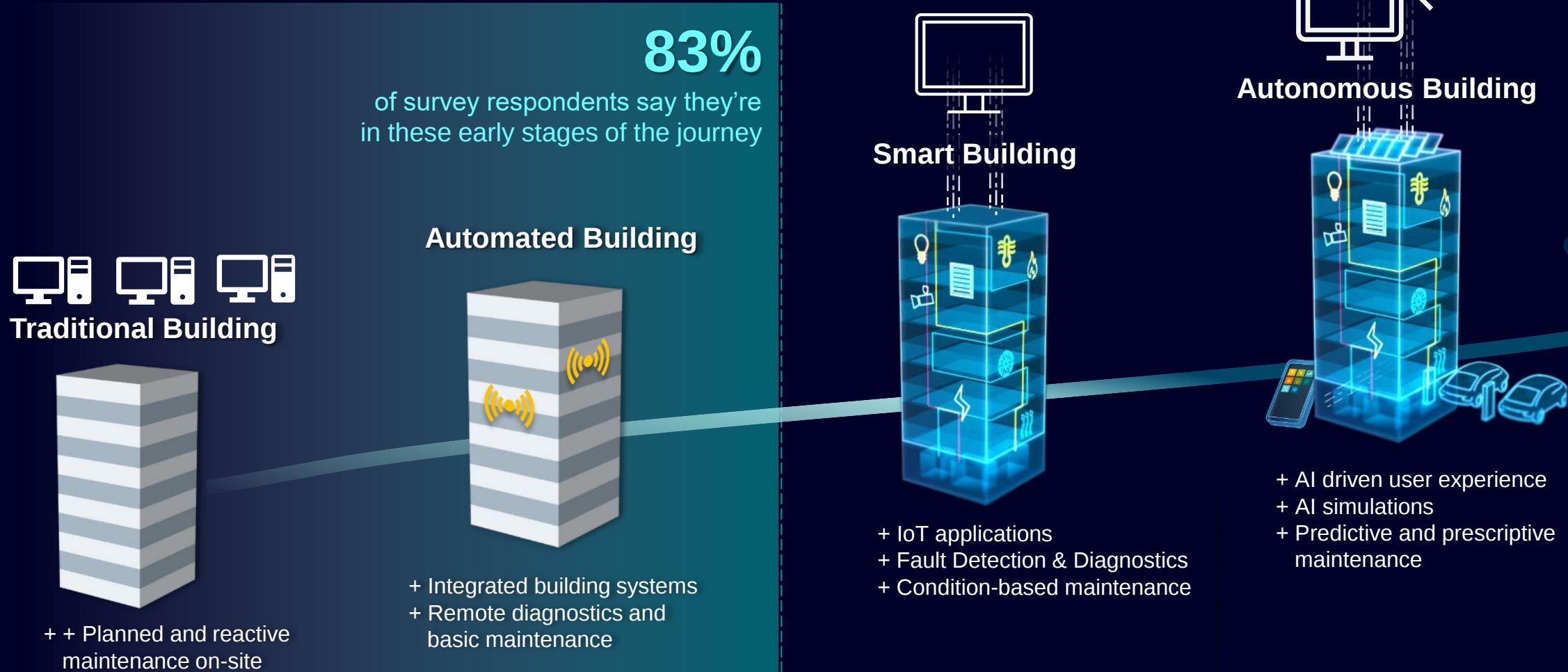
*Source: Dodge Emerging Construction Report Data, 2024

SI HE Customer Engagement Priorities: DIGITALIZATION AND DECARBONIZATION



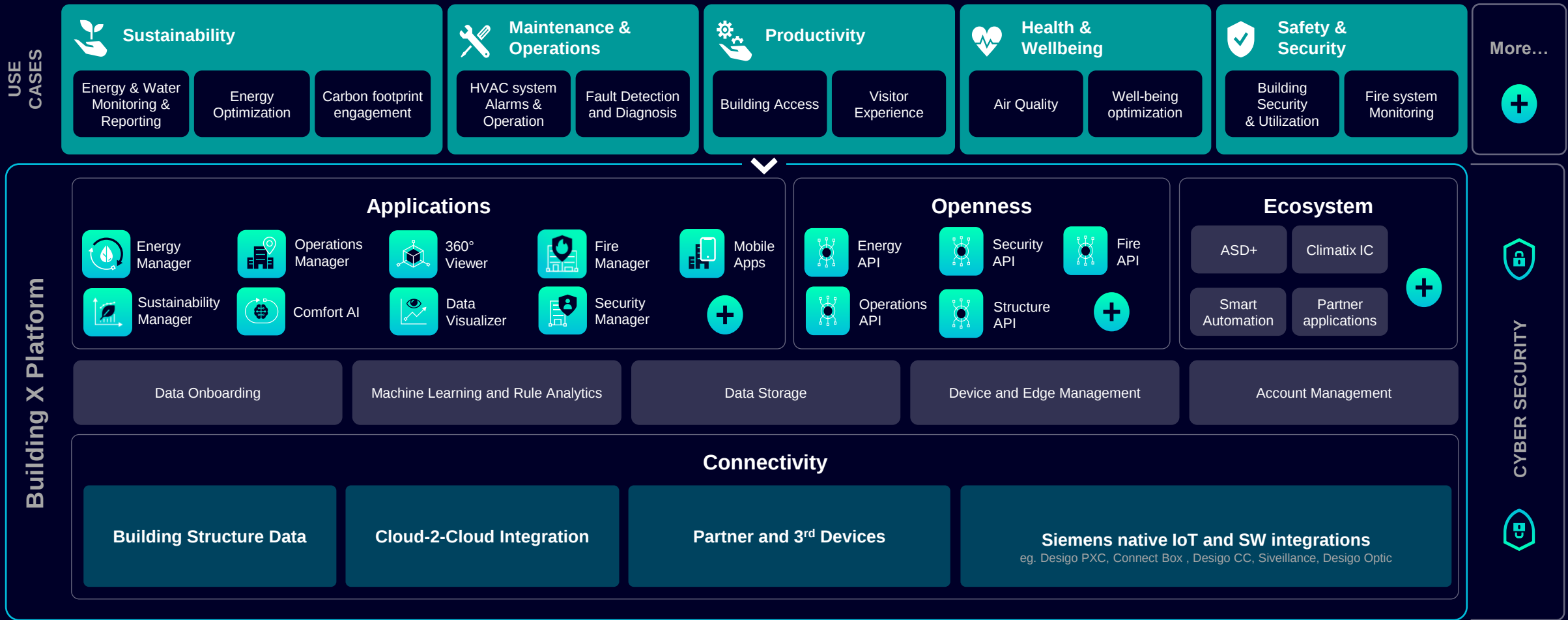
Digitalization

Customers are beginning their digital journey



Building X

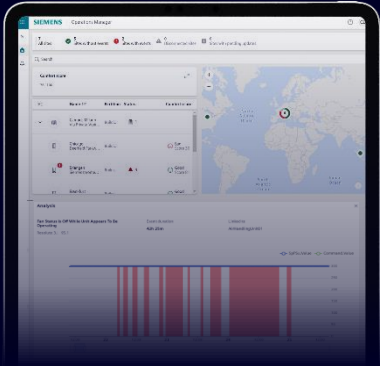
A platform to build on



Any field discipline
& device



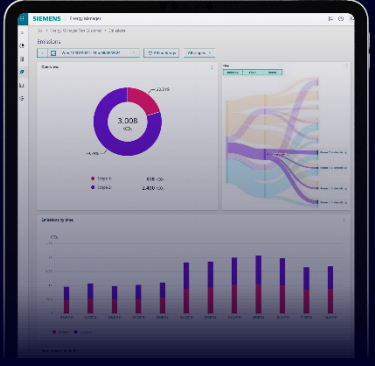
Any building
architecture & vertical



Operations Manager
Remote Monitoring and Control
Fault Detection & Diagnostics



Sustainability Manager
Scope 1 and 2 Emissions
Net Zero Planning



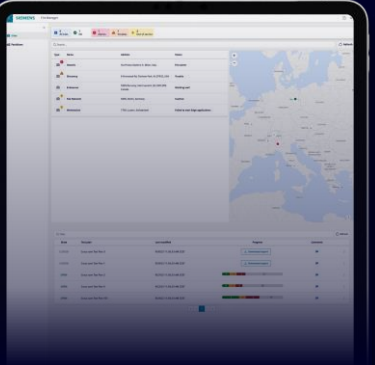
Energy Manager
Budget Tracking
Consumption Flows Monitoring



Comfort AI
Automate HVAC routines
Occupations settings



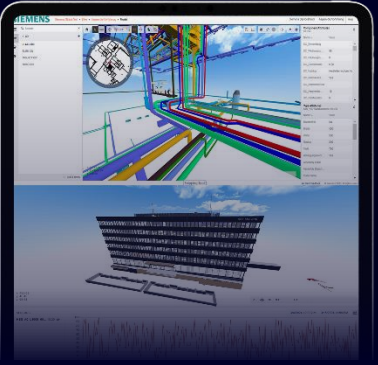
Security Manager
Physical Access Control
Alarms & Incident Management



Fire Manager
Fire Safety Maintenance
Remote Setup & Monitoring



360 Viewer
Indoor Navigation
Digital Twin w/ Real Time Data



Life Cycle Twin
Data & Document Management
Asset & Issue Management

The Building X Advantage

Ready-to-Go Applications

Business Function Oriented Use Cases
Faster Deployment & Time-to-Value
Continuous Updates & Support

Low-Effort Customizations

Low-Code Application Tailoring
Flexible Visualizations & Reporting
Reduced Development & IT Overhead

Open Innovation Ecosystem

Interoperability: No Vendor Lock-In
Marketplace of Trusted Solutions & Services
Readiness to Expand & Scale

Unmatched OT/IT Convergence

Full HW & SW Ecosystem Coverage
Data Completeness & Quality
Preservation of Existing Tech Investment



Growing Portfolio of Business-Oriented Applications



Designo
CC

Central
Utilities
Mgmt.

Digital
Service
Center
(DSC)

Virtual
Facility
Mgmt.
(VFM)

Southern Methodist University, Dallas TX

Optimized building performance via Digitalization

Central Utilities Management utilizing:

- **Designo CC** integrated control platform (buildings and CUP)
- **Demand Flow** Chiller Plant Optimization
- **Siemens Digital Services** – remote monitoring, analytics (FDD), control/remedy, O&M integration

Analytics and VFM Services

- Continuous optimization of building performance and maintenance, leveraging Siemens **DSC** and **Building X**
- **Analytics** on **60+** buildings with **65.000+** points (15min)

Value

- **60%** remote resolutions via the DSC
- **15%** reduction in utilities cost per gsf
- **26%** improvement in maintenance staffing efficiency
- **\$3.6 M/yr** maintenance budget reduction driven by Analytics and Virtual Facility Management
- Position SMU as recognized **"top tier" energy management program** within Higher Ed

Decarbonization Levers to Drive ESG, Manage Costs, and Build Resiliency

Energy Efficiency

- HVAC control and optimization
- Lighting control and technology
- Chilled water system optimization
- Heat recovery / storage capability
- Equip. upgrades / replacement
- Variable frequency drives

Vehicle Electrification

- EV Charging hardware
- Microgrid-enabled smart charging
- Charger installation
- Grid integration
- On-going charger management

Energy Generation & Storage

- Solar PV systems
- Microgrid power management
- Battery storage
- Fuel cells
- Co-gen retrofit and load mgmt.

Manage Thermal Loads

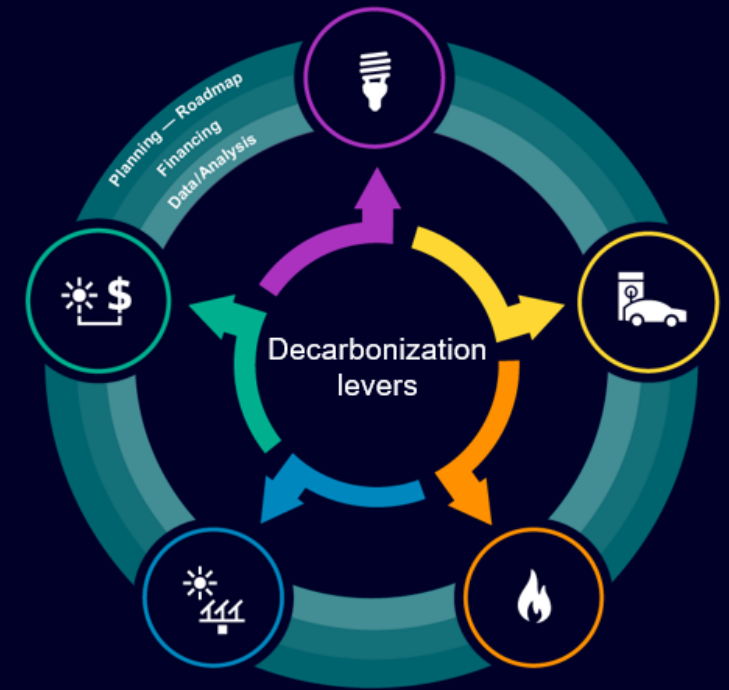
- Conversion to heat pumps
- Boiler and furnace electrification
- Steam to hot water conversion
- Low-carbon fuel conversion
- Dual-fuel retrofit
- Geothermal integration

Clean Energy Sourcing

- Unbundled RECs
- Utility Green Tariffs (UGTs)
- Nuclear or hydro supply
- Nature-based carbon offsets
- Virtual PPAs (VPPA)
- Renewable and low-carbon fuels

Address Value Chain

- Purchased goods & services
- Capital goods
- Energy supply chain
- Commuting & business travel
- Leased assets
- Transport and Delivery



Planning Considerations

- Establish clear baselines and benchmarks.
- Identify and evaluate opportunities.
- Prioritization criteria – ROI, ESG, resiliency
- Understand impacts from organizational change.
- Evaluate market risk and operational impacts.
- Define funding and financing strategies.

Energy Efficiency & Decarbonization



FY24 SI HE Business Results

- \$140M Energy (EnS + EPS) OI
- 24% Total SI B Business



Message that Resonates

- Infrastructure renewal supported by Guaranteed Savings
- Piloting Technology (Battery Storage, Enlighted, Digital Twin)
- Leveraging technology to improve space utilization
- Proof of Concept for larger campus infrastructure initiatives



Customer Spotlight

University of Florida Holland District* – Gainesville, FL

- Central Plant: HW Pipe, Boilers, CHW & DF, Electrical
- Buildings: LED, Enlighted, AHU upgrades, Design
- DES: MicroGrid, BESS, Solar PV & Thermal, EV chargers
- Services: M&V, Demand Flow, Automation, Mechanical

* FY23 win that revenue in FY24; not included in above FY24 Bus (\$OI) results.

Account Team

Marc Craddock
(Sust. Account Lead)

Steve Moore
(BAU SOL Lead)

Margo Thomas
(Sust. Account Exec)



\$26M
OI



\$6M
Services

Decarb & Energy Efficiency – Focus of SI + SFS Collaboration



Digital Business Optimizer (DBO™)

Free online cloud-based tool

- Validated data, minimal input, easy use

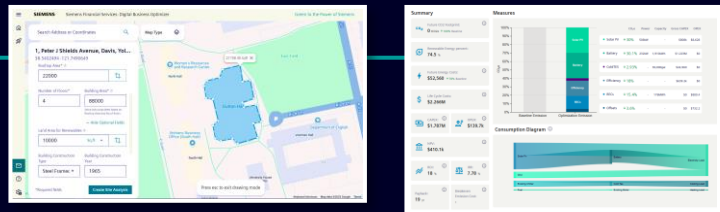
Scenario analysis for optimal impact

- e.g. Full decarbonization, resilience initiatives, fixed CapEx scenarios

Online tool → dbo.siemens.com

SFS Contacts:

- Erika Gupta – SFS PS-AM SUS
- Stephanie McAleer – SFS PS-AM SF



ESCO Project Financing

Guaranteed Energy Savings

- SI energy savings guarantee secures project financing commitments

Shift CapEx to OpEx

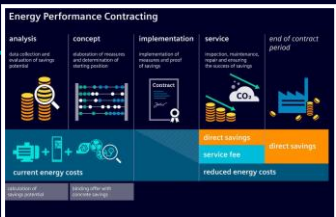
- Project paid as a % of savings

Often long-term, multi-phase

- Siemens becomes trusted infrastructure & financial partner

SFS Contacts:

- Eric Herman - SFS COF AM S CAP
- Joakim Prytz – SFS COF AM S CAP



Public-Private Partnerships (P3)

Transformative energy investments

- Long-term transformation of central utility assets on campus – decarb, resilience, etc.

Risk Transfer & Sharing

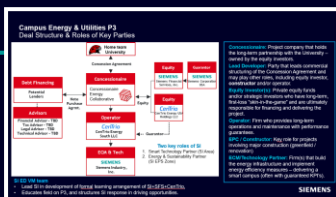
- Constriction, operational, performance, reinvestment risks to qualified partner

Consortium of partners

- Combined expertise of multiple private-sector partners

SFS Contacts:

- Kevin Kingston – SFS EQ AM 2
- Steven Mayo – SFS EQ AM 2
- Billy Maloney – SFS EQ AM 2



Campus Energy & Utilities P3

Continuum of Risk Transfer

Lower Risk Transfer

Highest Risk Transfer

Standard Performance Contract (ESPC)

- Limited Term - 20 year or less
- Guaranteed Savings
- Indicative Price RFP (Progressive RFP)
- Firm Fixed Price Contract
- Size/ Scope limited by Savings
- Design-Build (DB) Delivery

Availability Payment Contract (\$100M-\$250M)

- Long Term – 25 year or more
- Performance Based
- Committed Price RFP or Progressive Procurement
- Scope Flexibility
- Life Cycle Investment
- DBM/DBOM/DBFOM Delivery

Concession Contract (\$200M - \$1,000M+)

- Long Term – Up to 50 years
- Performance Based
- Committed Price RFP
- Monetization (incl. “big check”)
- Full Risk Transfer
- Future Capital Investment
- DBFOM Delivery

References: -) Brown, J. (2021, October 25). *Energy and Utilities: Options for Meeting Climate, Sustainability and Resiliency Goals Faster and Affordably*. P3 Higher Education Summit, San Diego, CA, USA.



Baylor University

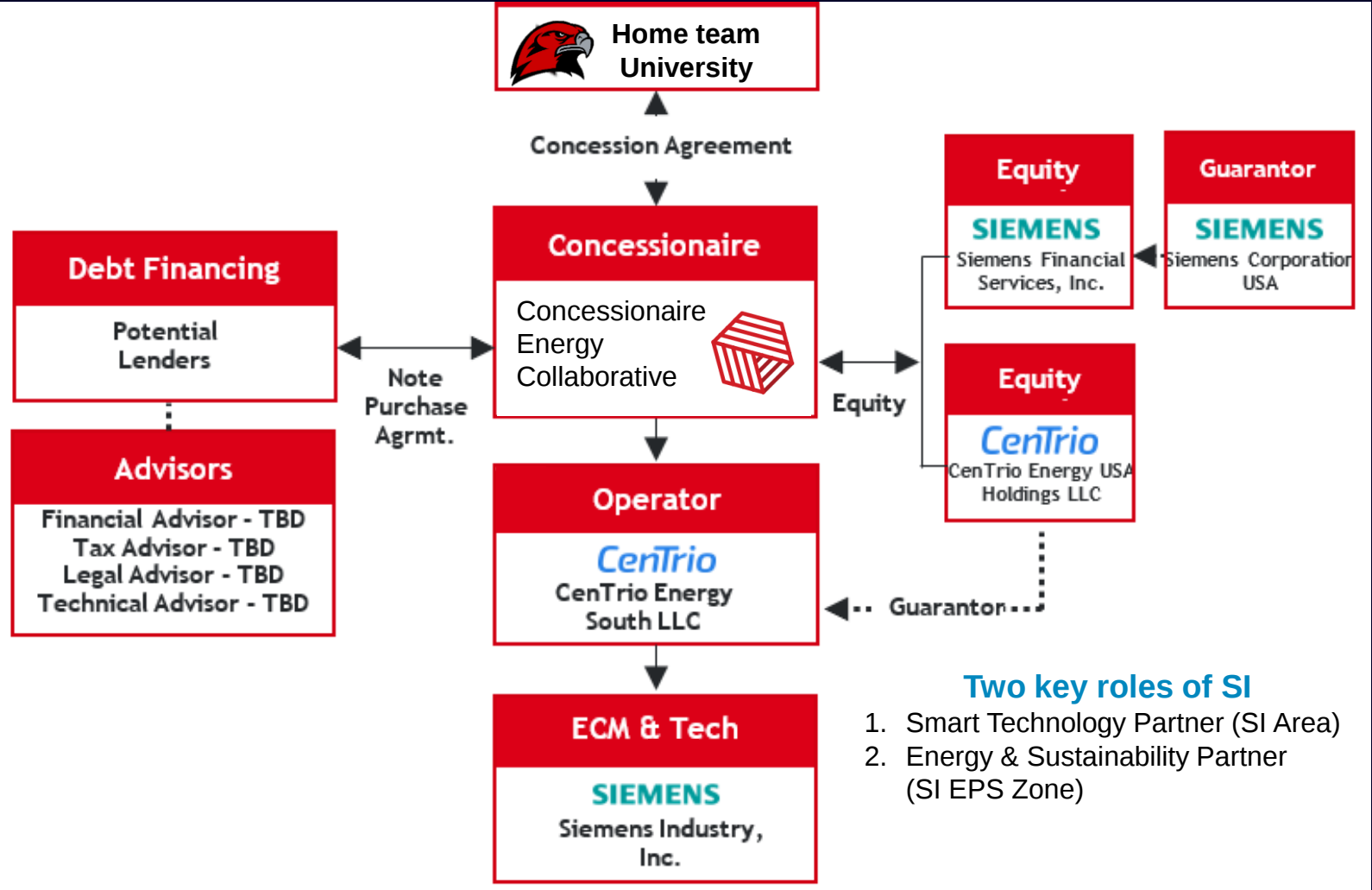


Georgetown University

IOWA

Campus Energy & Utilities P3

Deal Structure & Roles of Key Parties



Concessionaire: Project company that holds the long-term partnership with the University – owned by the equity investors.

Lead Developer: Party that leads commercial structuring of the Concession Agreement and may play other roles, including equity investor, **constructor** and/or operator.

Equity Investor(s): Private equity funds and/or strategic investors who have long-term, first-loss “skin-in-the-game” and are ultimately responsible for financing and delivering the project.

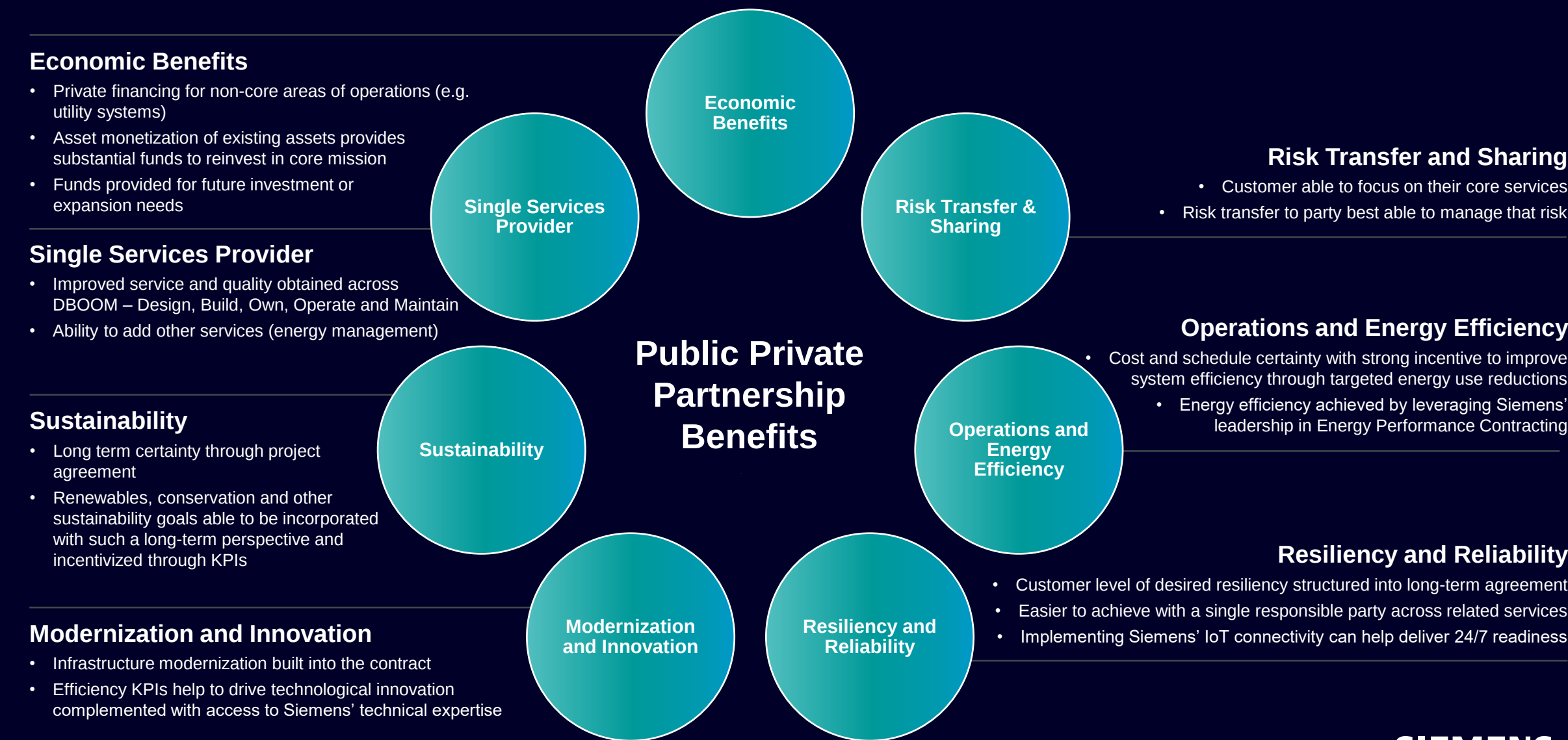
Operator: Firm who provides long-term operations and maintenance with performance guarantees.

EPC / Constructor: Key role for projects involving major construction (greenfield / renovation)

ECM/Technology Partner: Firm(s) that build the energy infrastructure and implement energy efficiency measures – delivering a smart campus (often with guaranteed KPI’s).

Significant Value Driven by Infrastructure Partnerships

Unlock substantial value through financing, operations, technology innovation and sustainability



A background of interlocking puzzle pieces. Each piece contains a different business-related icon in a light blue color. The icons include a gear, an envelope, a group of three people, a speech bubble, a target with an arrow, a handshake, a bar chart with an upward arrow, a lightbulb, a globe, and a circular arrow. A hand is visible on the right side, holding one of the puzzle pieces.

Industry Engagement & Partnership



Engagement with Industry Events

Thought Leadership Events & Webinars

- Higher Education Facilities Forum, Nov 10-12 (Tempe, AZ) ✨
- IDEA CampusEnergy 2025, Feb 3-6 (Boston, MA)
- APPA Leadership in Educational Facilities
 - APPA Spring Conference, Apr 9-11 (New Orleans, LA)
 - 3 promoted Webinars featuring SMEs, throughout year
 - Regional shows Thought Leadership, throughout year
- AASHE Campus Decarbonization Academy (Mar-Sept) ✨
 - Partnership with Second Nature, APPPA, NACUBO, SCUP, I2SL
- RSC's Facilities & Campus Energy Summit, May (DC)
- Natl. Assn of College & Univ Business Officers, Jul 26-29 (DC)
- RSC's Smart Data for Energy Summit, Fall 2025 (DC)
- ASBO, Oct 21-23 (Fort Worth, TX)



EMPOWER+ Higher Education Partnership Programs Supporting your Core Mission!



EMPOWER Learning

- Packaged STEM programs
- Resources for educators
- Hands-on learning
- Career exploration



EMPOWER Custom

- Empower (seed) grants
- Project expertise / consultation
- Student engagement
- Community outreach
- Living Labs



EMPOWER Workforce

Academic Programming

- Digital Industries Software (DiSW)
- Siemens Mechatronics Systems Certification Program (SMSCP, Sitrain)
- Siemens Cooperates with Education (SCE)
- BAS Technician Certification
- Microgrid Training Program
- e-Mobility Training Program
- SISchool
- T UR (formerly CT; intermittent)

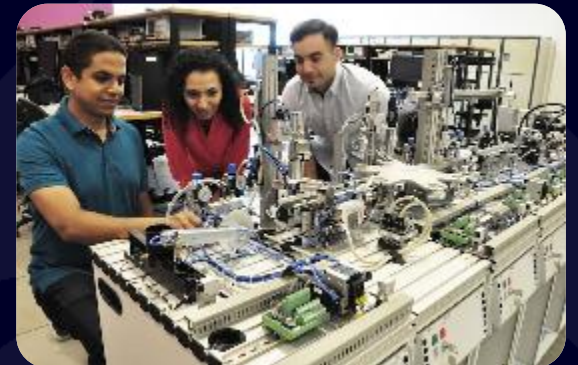
Talent Acquisition

- Internships and recruiting
- Development and hiring programs



EMPOWER Community

- Storytelling via 360° communications
- Impact videos
- Equity, Diversity & Inclusion
- Community outreach
- Industry engagement



Education SharePoint Pages & Viva Engage



K-12

Smart Schools for K-12

Higher Ed

Smart Campuses via Siemens Xcelerator

Decarbonization in Higher Ed

Empower+ Partnership Programs

Smart Air Quality for the Ed Market

- Customer presentations
- ED Community Call recordings and slides
- Market reports & Industry Organizations
- Links to Highspot assets, pitches, impact videos
- Tradeshow resources
- Contacts

Join Viva Engage: [K-12](#) and [Higher Ed](#)

* ED Community Call invitations are sent to Viva Engage group members

[Link to main EDVM SharePoint page](#)

The screenshot shows the Siemens Education Vertical Markets (EDVM) SharePoint page. The navigation menu on the left is highlighted with a red box. The main content area includes sections for 'FY24 Smart Campus Campaign Resources', 'Siemens offerings help address Higher Ed's toughest challenges', 'Featured Resources', and 'Global: Xcelerator for Higher Ed'. The page also displays various customer decks, white papers, and infographics.

Visit the [SFS Higher Ed iPortal](#) for industry news, reports, white papers, and other industry specific topics