



Siemens Automotive

- World market leader in Automation
- Support Automotive customers globally and locally through dedicated account managers and regional hubs
- Continuous development of the product portfolio and the installed base



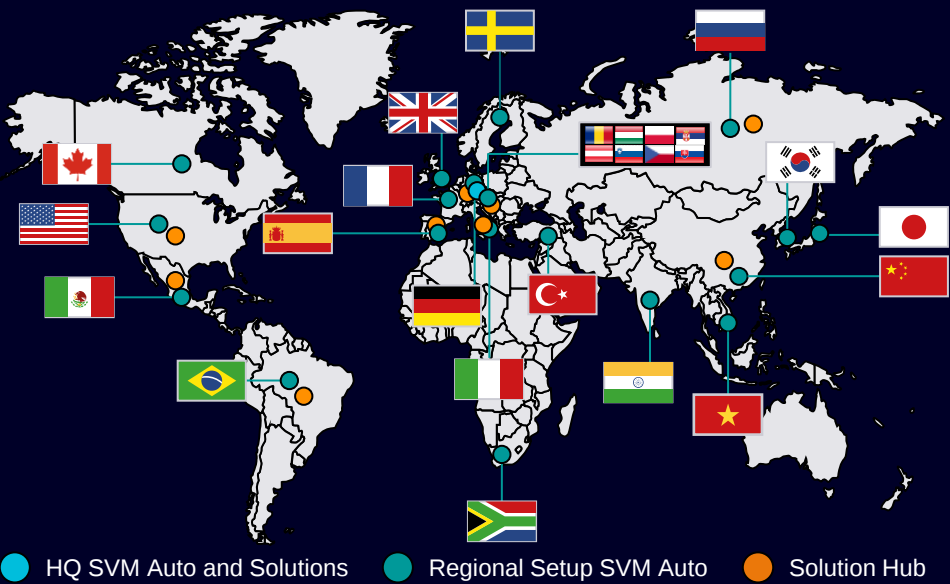
We support all discrete processes with the most innovative automation products and systems and will continue to strengthen our market leadership in Automotive

Bernd Mangler, Senior VP Automotive

SIEMENS

Automotive Setup – Our Strong Commitment to Automotive

Global Footprint to Support our Customers Wherever they Go



Automotive is the **core industry** for **Siemens** with ...
... installations at all **Top 15 Automotive players**
... contributing **~19%** to **Digital Industries business**
... dedicated teams in **26 countries**



Product and Production Lifecycle Management



Digital offering

SVM Automotive – Overview Regional Vertical Heads



Christoph Wagner¹



Brazil
Alexandre Sakai



Canada
Abhijit Singh



China
Wei Xia



France
Dominique Thibot



Germany
Frank Hauber



Great Britain
David Sutcliffe



India
Atul Dalvi



Italy
Elisabetta Conte



Japan
Fumiyasu Ohbuchi



Korea
JangSeob Lee



Mexico
Roger Guerrero



South Africa
Conrad Loots



Spain
Jesus Quiroga



Sweden
Mikael Kraft



Turkey
Mustafa Belhan



USA
Reinhold Niesing

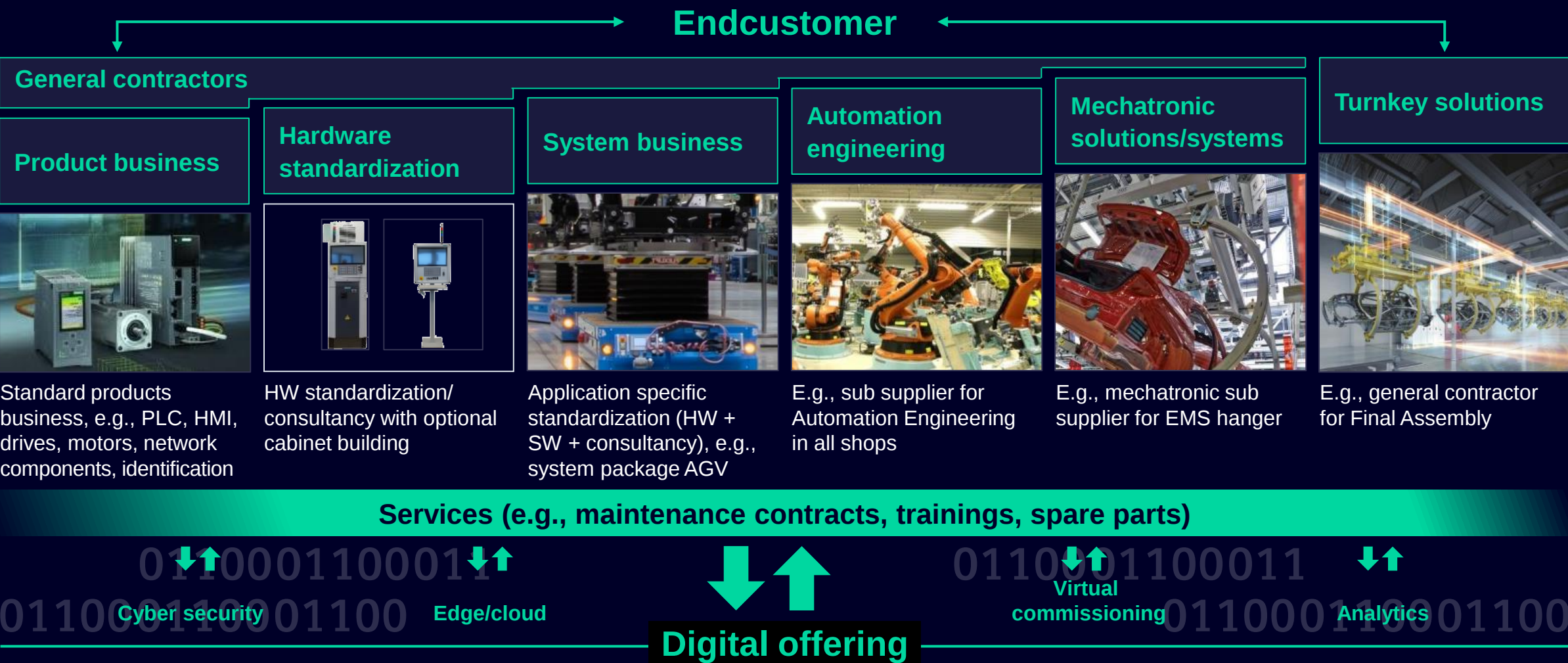


Vietnam
Pham Ngoc Minh

¹ LCB-AT (Austria + Poland, Czech, Hungary, Slovenia, Serbia, Slovakia, Romania)

Digital Enterprise

Scalable Siemens offerings for Automotive



Account Management – a consistent long-term customer centric approach

Ecosystem Approach

Global
Accounts

Local
Accounts

Car Manufacturers

First Tier Suppliers

Line Builders

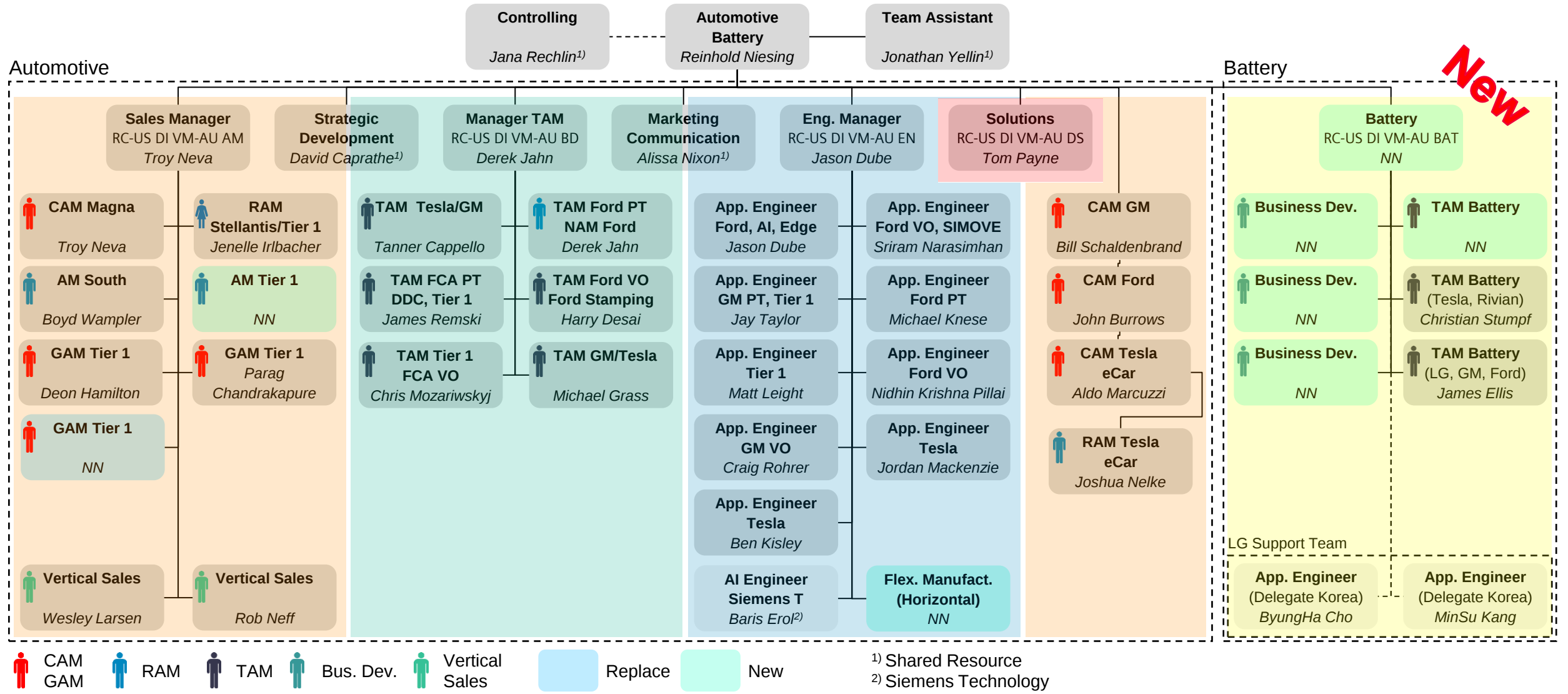
Standardization

Digitalization

- We understand our customer challenges
- We use our unique expertise to solve problems and innovate with our customer, as partners
- We believe in long-term, close and trustful collaboration
- We follow our customers wherever they go

DI VM Automotive / Battery (Cell)

Automotive / Battery (Cell) Setup in the USA



US End-Account Team



Bill Schaldenbrand - CAM

- General Motors



John Burrows - CAM

- Ford Motor Company



Aldo Marcuzzi - CAM

- Tesla
- eCar Start-ups



Josh Nelke – NAM

- Tesla
- Rivian
- Lucid
- Nikola

Tier and US Account Team



Parag Chandrakapure - GAM

- Brose
- Continental Automotive
- Schaeffler
- Borg Warner
- Delphi
- Federal Mogul
- Tenneco
- Adient PLC
- Yanfeng



Deon Hamilton - GAM

- American Axle (Metaldyne)
- Dana
- Faurecia
- Grupo Antolin
- Inteva
- Lear Corp
- Plastic Omnium
- Valeo
- Hella



Jenelle Irlbacher - RAM

- Mahle
- Nexteer
- Honda
- Stellantis
- Elring Klinger
- Freudenberg



Troy Neva - CAM

- Meritor
- Allison Trans
- Autoliv
- Bosch
- Cooper Standard
- Cummins
- Dakkota
- GKN
- Leoni
- Magna
- Navistar
- Nemak
- Paccar
- TI Auto
- ZF
- Mann & Hummel



TBD - GAM

- Benteler Auto
- Eberspaecher
- Flex-N-Gate
- Fori Automation
- Gestamp
- Martinrea
- Metalsa
- Tower Auto
- Webasto



Boyd Wampler - NAM

- Draexlmaier
- Hyundai/Kia
- IAC Group
- Knorr Bremse
- Linamar
- Nissan
- Toyota
- Denso
- Vinfast
- Volvo
- Volvo Car

US Automotive OEM Account Team



Robert Neff - OEM

- ADVANCED SYSTEMS AND CONTROLS INC
- Arrow Automation
- Assembly & Test Worldwide Inc (ATS)
- ATS ASSEMBLY AND TEST INC.
- AUTOMATION & MODULAR COMPONENTS INC
- C E C CONTROLS COMPANY INC
- CONTROL SYSTEM INNOVATORS USA INC
- DCS CORPORATION
- DESIGN SYSTEMS INC
- DIGITEK
- Dynamic Control Solutions DCS
- INDICON CORP
- KUKA ASSEMBLY AND TEST CORP
- KUKA North America
- KUKA ROBOTICS CORPORATION
- KUKA SYSTEMS CORPORATION NORTH
- KUKA Toledo
- KUKA WELDING SYSTEMS NORTH AMERICA LLC
- Mino Automation
- PERCEPTRON INC
- PROCESS AUTOMATION SOLUTIONS
- QMC INC
- VALIANT INTERNATIONAL INC
- VDL Steelweld
- Weiss North America



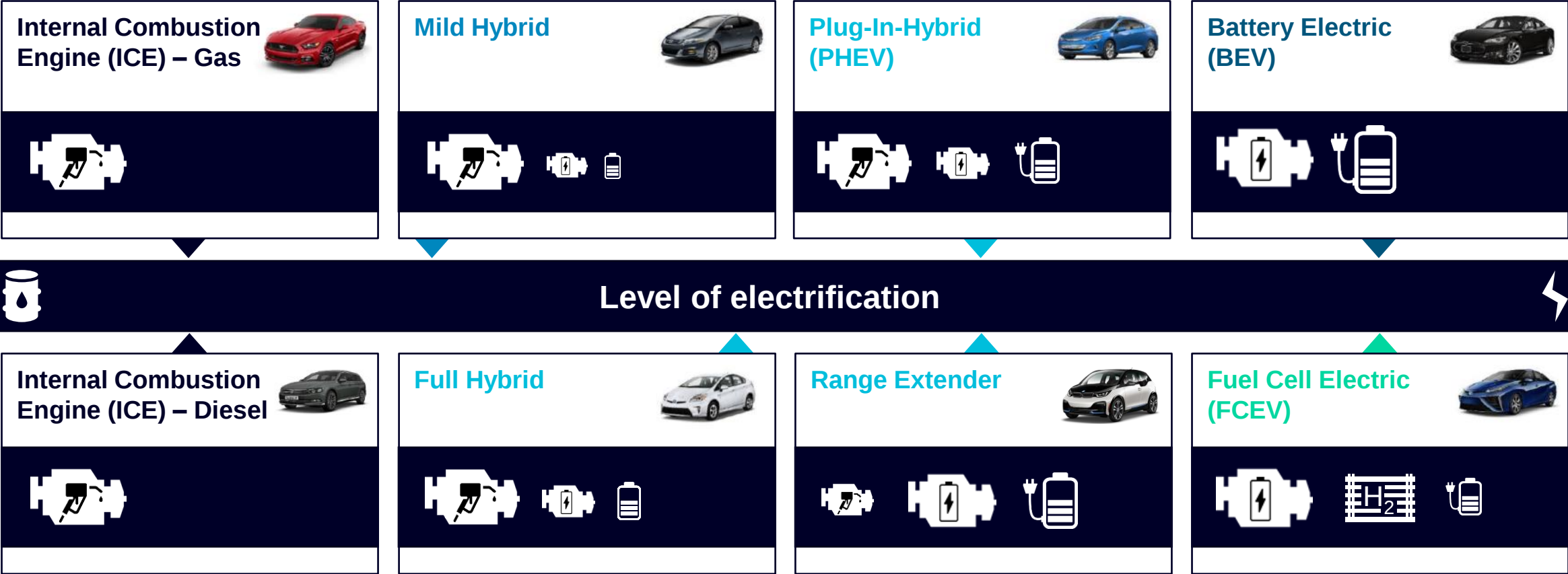
Wes Larsen – OEM

- ADVANCED SYSTEMS
- ASE INDUSTRIES
- Atlas Technologies Inc
- AUTOMATED SYSTEMS INC
- Balance Technology
- CINETIC DYAG CORP
- COMAU INC
- DOMINION TECHNOLOGIES GROUP INC
- Drake Enterprises Inc.
- DURR AUTOMATION INC
- Durr Ecoclean Inc
- DURR PRODUCTION SYSTEMS INC
- DURR SYSTEMS INC
- ESE L.L.C
- FIVES CINETIC AUTOMATION CORP
- FIVES DYAG CORP
- Fives Inc
- FIVES MACHINING SYSTEMS INC
- FLEXIBLE AUTOMATION INC
- Giffin
- HENSHAW INC
- ICA CINETIC AUTOMATION
- PENTIER GROUP INC
- Pyxis Technology
- SCHENCK USA CORP
- TEST DEVICES INC.

Cars by engine type

Overview

Major Powertrain component overview



Electric motor Battery Internal combustion engine Fuel cell stack

Source: ICCT (International Council on Clean Transportation), Autofacts Analysis, PWC

Inflation Reduction Act



- **Vehicles must be assembled in the USA**
- **Battery components manufactured or assembled in the USA**
- Battery minerals extracted and processed in the USA or a country with a free trade agreement or recycled in the USA

North America final assembly requirements (after August 16, 2022). Eligible electric vehicles and plug-in hybrid electric vehicles must be assembled in North America.

Battery requirements (starting January 1, 2023). Assuming all other criteria are satisfied, the battery requirements have two parts:

- \$3,750 of the new credit is based on whether at least 40 percent of the vehicle's **critical minerals** were extracted and processed in the US or countries with a free trade agreement with the US or were recycled in North America. This requirement increases over time, going up to 80 percent in 2027. Additionally, beginning in 2025, vehicles with critical minerals that were extracted, processed, or recycled by a foreign entity of concern are not eligible. [Section 40207\(a\)\(5\) of the Infrastructure Investment and Jobs Act](#) defines foreign entities of concern.
- The other \$3,750 of the new credit is contingent on at least half of the vehicle's **battery components** being manufactured or assembled in North America. This requirement also increases over time, going up to 100 percent in 2029. Additionally, beginning in 2024, vehicles with battery components that were manufactured or assembled by a foreign entity of concern are not eligible.

Since the battery sourcing requirements become more stringent after they kick in, mining companies, battery manufacturers, and automobile companies are scrambling to establish facilities in the US to meet the new Clean Vehicle Credit requirements.

Battery Core Value Chain-Target Customers

