

Powering India's sustainability  
and growth for global

# IMPACT

**India Investor Event**  
December 2024



Life Is On

**Schneider**  
Electric

# Disclaimer

All forward-looking statements are Schneider Electric management's present expectations of future events and are subject to a number of factors and uncertainties that could cause actual results to differ materially from those described in the forward-looking statements. For a detailed description of these factors and uncertainties, please refer to the section "Risk Factors" in our Universal Registration Document (which is available on [www.se.com](http://www.se.com)). Schneider Electric undertakes no obligation to publicly update or revise any of these forward-looking statements.

This presentation includes information pertaining to our markets and our competitive positions therein. Such information is based on market data and our actual revenues in those markets for the relevant periods. We obtained this market information from various third-party sources (industry publications, surveys and forecasts) and our own internal estimates. We have not independently verified these third-party sources and cannot guarantee their accuracy or completeness and our internal surveys and estimates have not been verified by independent experts or other independent sources.

# Schneider Electric in India



**Manish Pant**  
Executive Vice President  
for International Operations



# Schneider in India 60+ years legacy of creating IMPACT

**38k<sup>1</sup>** employees

2x in last 7 years

**c.30%** Women Employees

**India emerging as talents hub**

For India and for the rest of the Group

**31** manufacturing sites

across 13 locations

**3** major brands

**7** training centers

<sup>1</sup> including temporary employees

# Fulfilling mission critical commitment towards India's future



**“Digital India”  
mission**

**1 in every 3 Data Center**

is powered by  
Schneider Electric  
solutions

**“Naye Bharat  
Ka Naya”  
Infrastructure**

**13 Smart Cities**

powered by Schneider  
Electric & more in  
development

**“Make in  
India” pledge**

**2.5x to 3x**

Capacity expansion to support  
growing needs in the country  
and other areas of growth

**Energy  
transition**

**~25%**

of India's solar capacity  
supported by Schneider  
Electric solutions

# We're playing an active role in nation building



Largest convention center in Asia **powered by Schneider Electric**

## Ayodhya Temple

**Energize** landmark Ram Mandir and Ayodhya City infrastructure

## Chandrayaan 3

**Powering India** to become 1st Country to touchdown near Lunar South Pole

## Central Vista New Parliament

**Strengthening infrastructure** by building new facilities for India's Parliament

# Envious market position across our four end-markets

Data Center



Buildings



Industry



Infrastructure



# With sustained focus on **key markers** **& strength** of Schneider Electric - in India

**TELANGANA,**  
THE INNOVATION YATRA  
IS AT YOUR DOORSTEP!

World-class  
**Technology**  
with Indian flavors

**Successful integration** of L&T Switchgear with a **two-brand strategy** in electrical and automation

Unique Indian market coverage

Prescription across end-markets

Software, Digital Services and **Sustainability**

# Delivering world-class technologies and innovation

A black and white photograph of a woman with dark hair and glasses, wearing a light-colored lab coat over a dark shirt. She is looking down at a computer monitor, which is partially visible at the bottom of the frame. The background is blurred.

**6,000+<sup>1</sup>**

Software, innovation  
& R&D engineers

**1.4k+**

Patents  
Awarded

**Future-Ready R&D for  
Greater Impact & Efficiency**

World-class  
**products R&D**

India **for India** and  
India **for the world**

<sup>1</sup> including temporary employees

# Our Global leading product offers adapted and available for the Indian market

## Energy Management



Med. Voltage Products & Equipment

## Industrial Automation



Variable Speed Drives

Contactors



Molded-case Breaker

Uninterrupted Power Supply, Single & 3 Phase



Motion Control

Signaling



Push buttons



Final Distribution

Wiring Devices



Building Management



Automation Expert



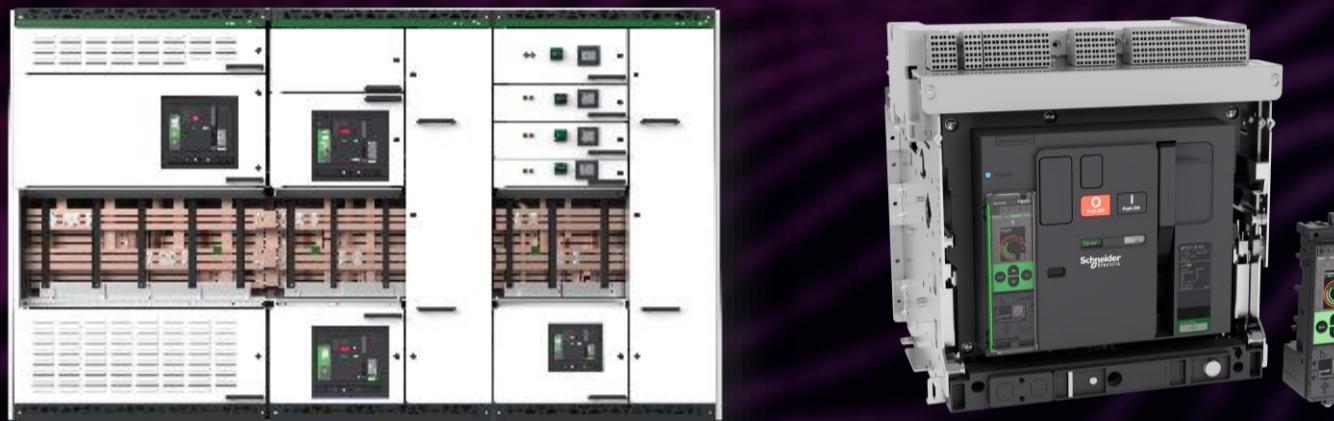
Triconex



Foxboro DCS

# Newly launched to support India needs for Digital and Electric

## Power Distribution



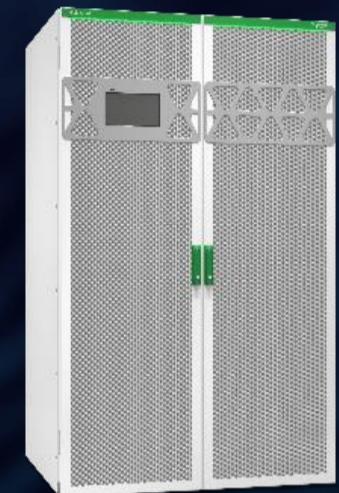
BlokSeT Lean & MasterPacT MTZ Active

## Homes



Wiser 2.0 and Miluz Lara

## Data Centers



Galaxy VXL – High-efficiency UPS

## Power renewable ambitions



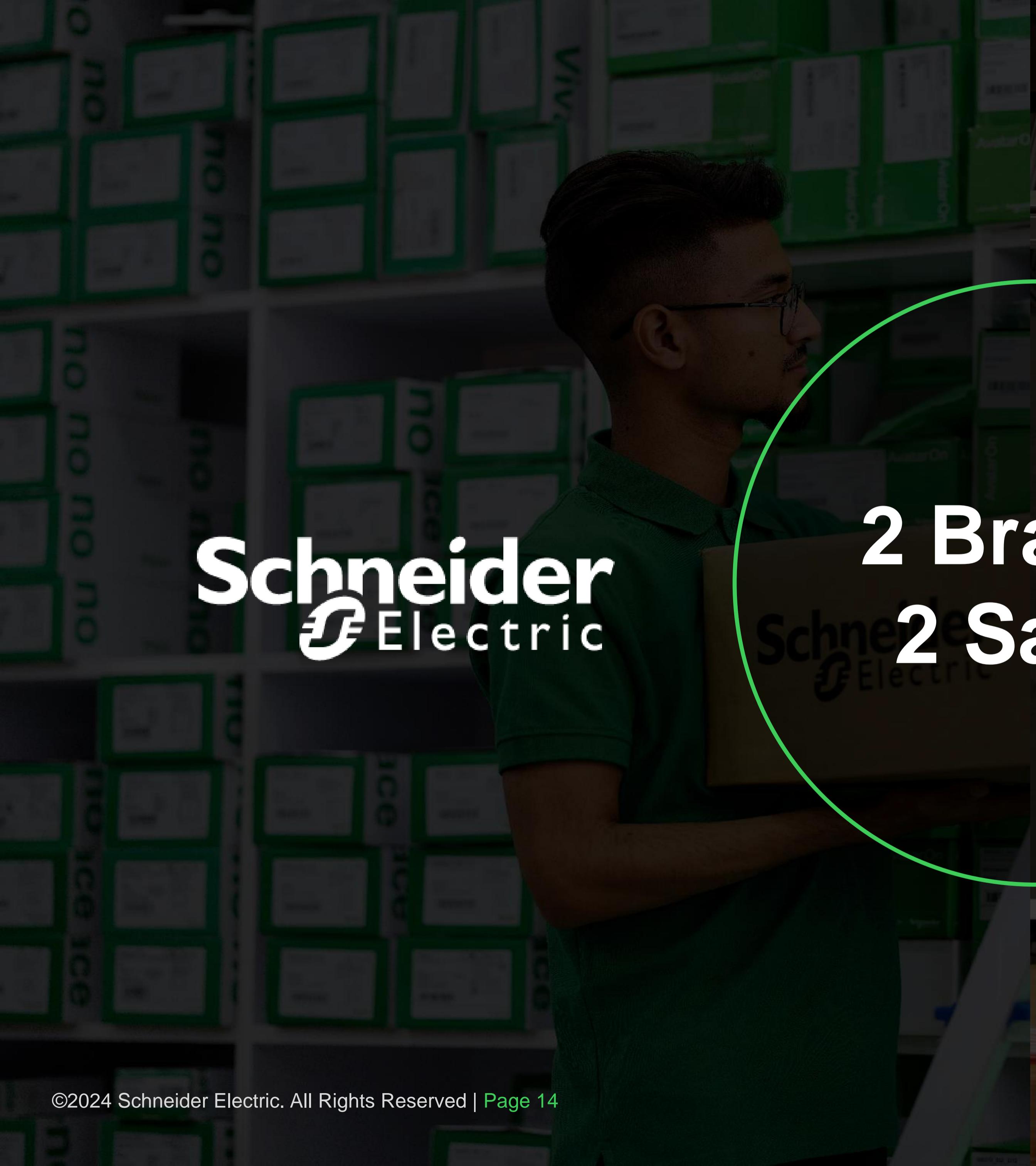
SF6-free AirSeT & EvoPact HVX-O VCB

## Supporting “Make in India” mission



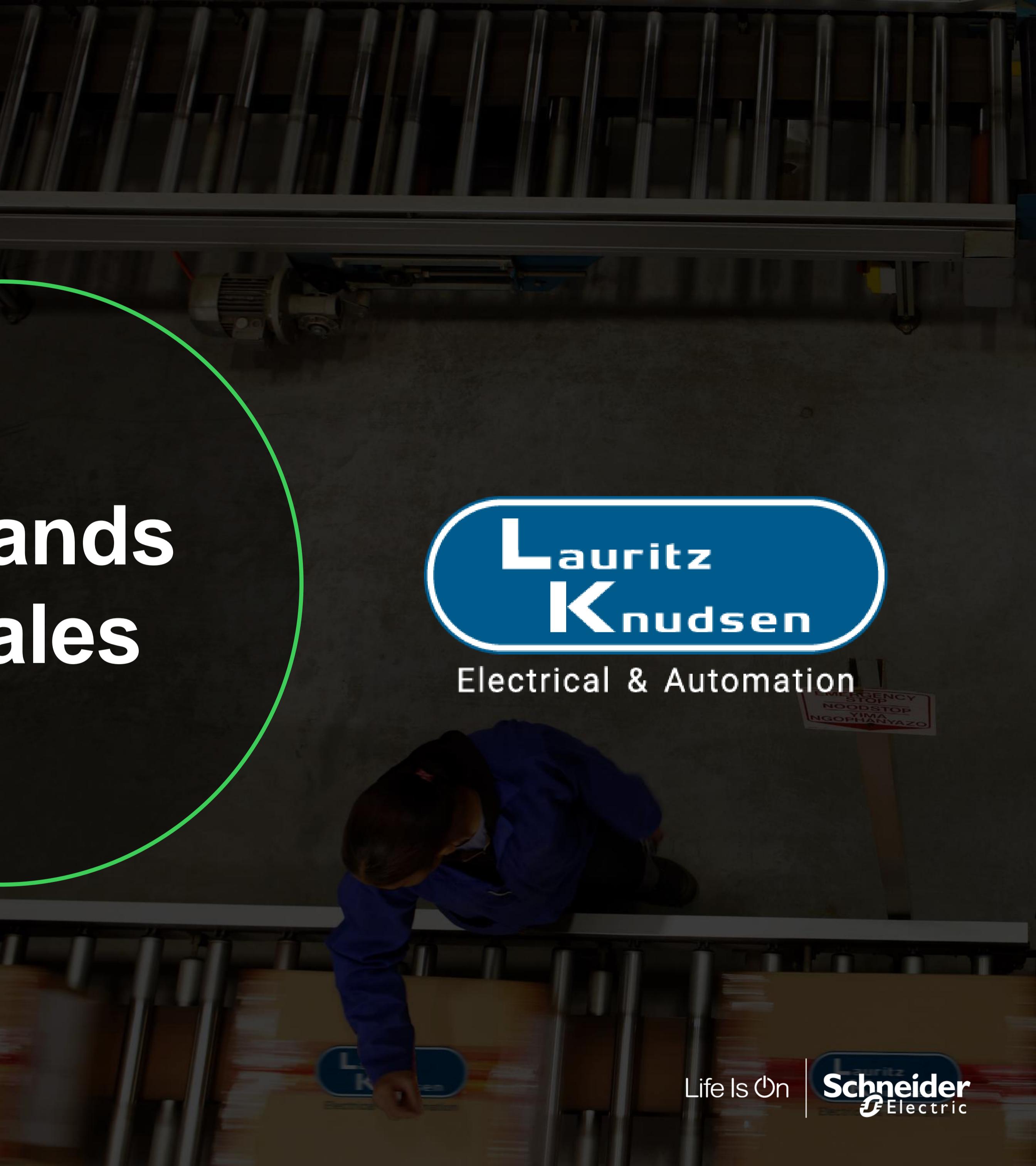
EasySet MV & MV Process Drive

# Leveraging a unique two brands strategy



**Schneider**  
Electric

2 Brands  
2 Sales



**Lauritz**  
**Knudsen**

Electrical & Automation

# Market focus leveraging respective brands strengths



Strong  
Prescription  
capability



MNC, Global  
entrants, large  
local players



Premium &  
Large Projects



End to end  
solutions with  
digital & services

## Customers



Electrical & Automation



Transactionalized  
with LV-MV  
focus



MSMEs



Stronger product  
customization



Govt., Public  
sector & Local  
players

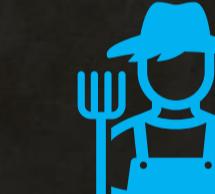


Metro, Tier 1, 2

## Geographies



Tier 2 and  
beyond



Rural

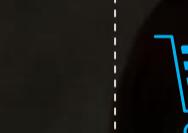
## Segments



T&D  
Utilities



Renewables



CPG



E&C  
Electrical



Public  
Hospitals



Airport,  
Metro (T2),  
Railways



Mid scale  
Commercial  
& Residential



Affordable  
Housing



Agriculture

# Our Brand Story

1954

Launch of L&T Switchgear



**L&T Switchgear**



became the most loved brand in the  
**Agri market** for over 7 decades

2024

Birth of our new brand

**Lauritz  
Knudsen**

Electrical & Automation

Listen

Partner

Innovate



Customised  
Solutions



Strong Local  
Partnerships



Deep Reach



Agility

# Transitioning to Lauritz Knudsen

## Trust has a new name

Facilitated through high decibel media campaign



Most iconic voice (Amitabh Bachchan) pronouncing Lauritz Knudsen and his show (Who wants to be a Millionaire)



Lauritz Knudsen in the front of Jersey, of Mumbai Indians in Indian Premier League '25 & '26



Closer to the Customers | Grass root campaigns



Halla Bol Market Campaigns



Town to town van campaign



Village level campaigns



Product **portfolio**  
& customer buying  
**behavior** necessitate  
**2B2S<sup>1</sup>** strategy in India

## Market & Segments

Deeper coverage and market reach

### Channel

Large footprint with geographic coverage and channel retention

### Portfolio

Leveraging full strength of the combined portfolio

### Choice to Customer

Both Lauritz Knudsen & Schneider are amongst requested names in tenders

<sup>1</sup> two brands, two sales



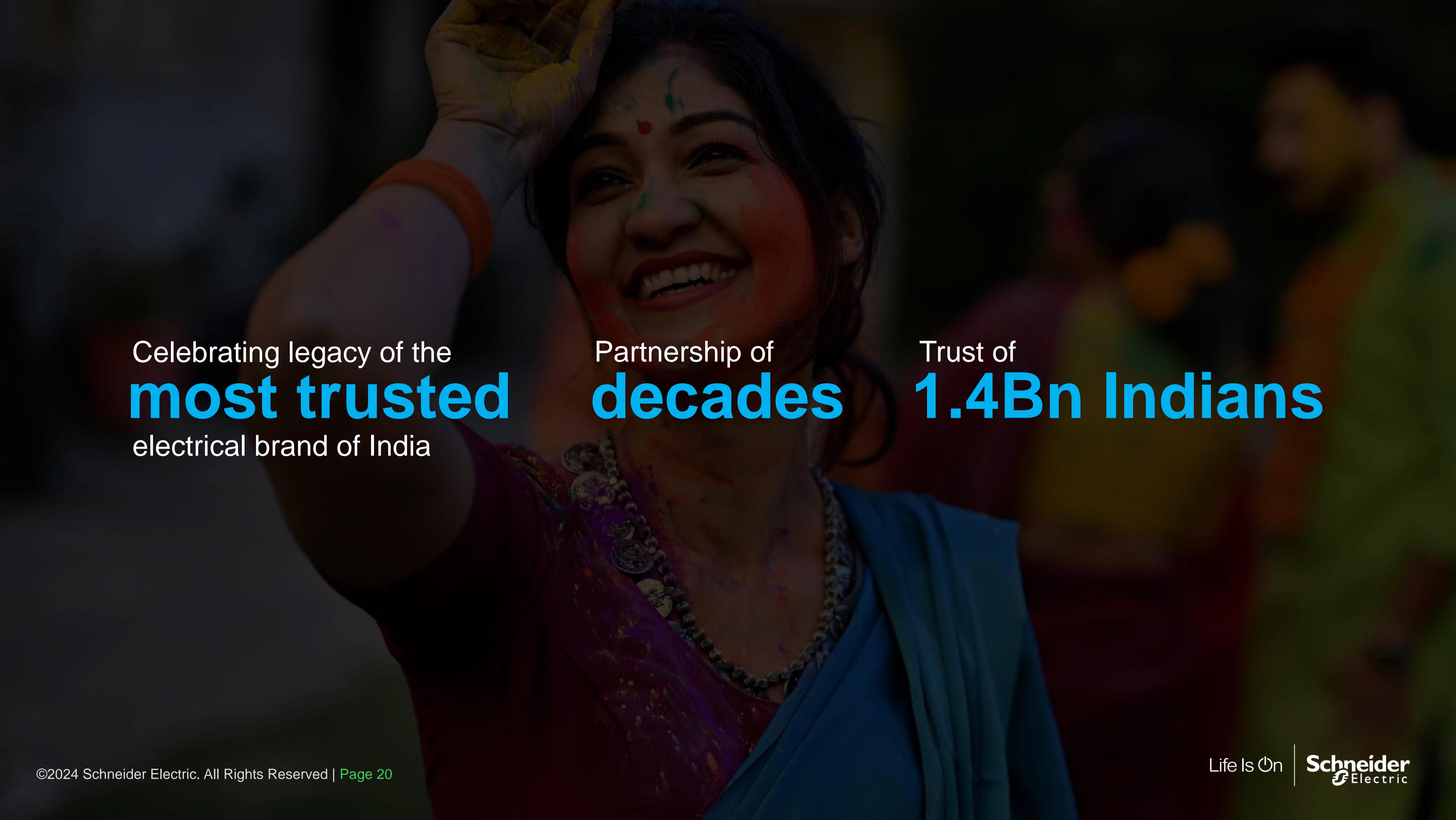
Electrical & Automation



**Naresh Kumar**  
Chief Operating Officer  
Lauritz Knudsen

# in India



A woman with dark hair and a red bindi on her forehead is smiling broadly. She has orange and green Holi powder painted on her face. She is wearing a blue sari with a purple border. Her hands are raised near her head. The background is dark and out of focus.

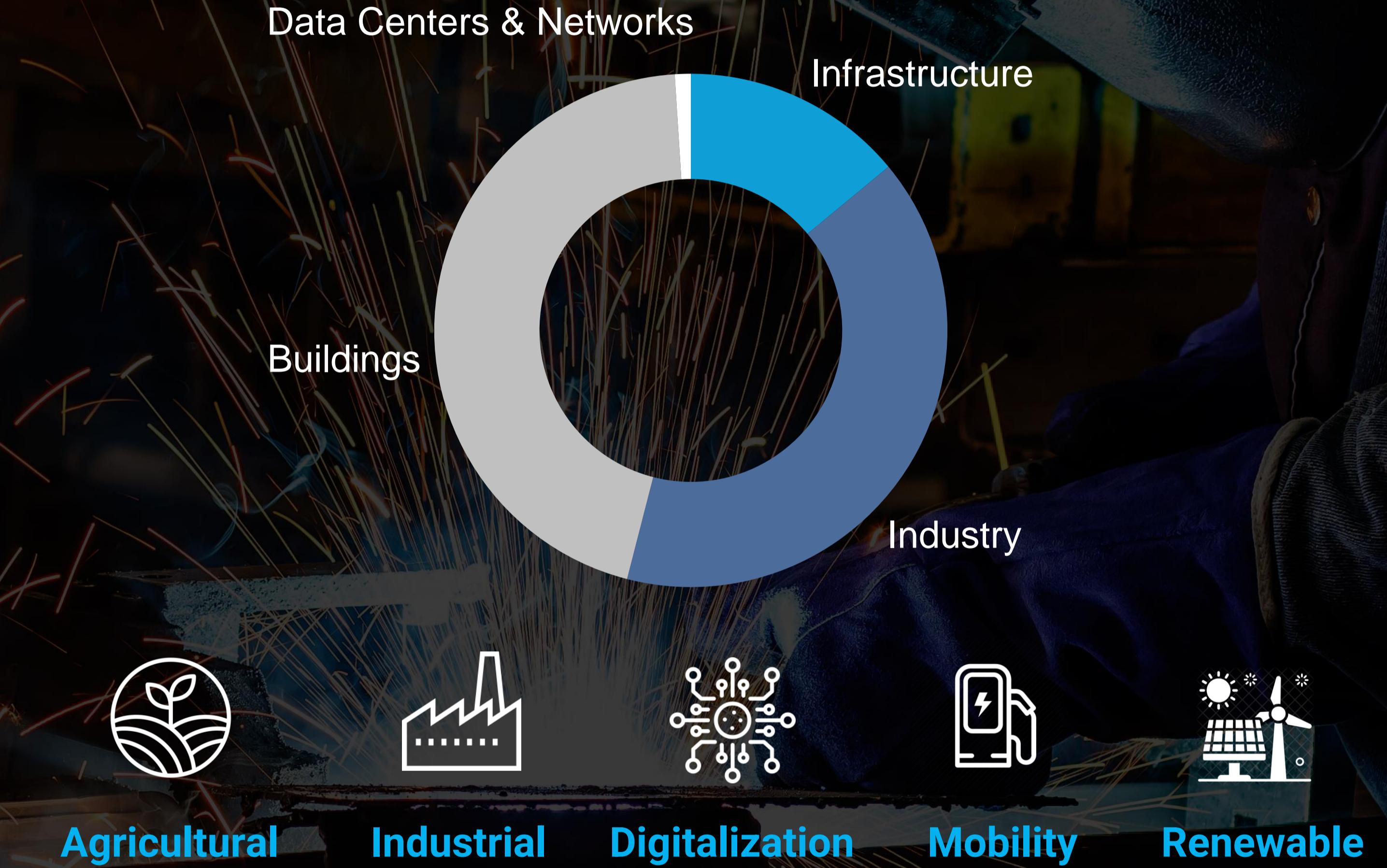
Celebrating legacy of the  
**most trusted**  
electrical brand of India

Partnership of  
**decades**

Trust of  
**1.4Bn Indians**

We're proud to have partnered with India as it has witnessed revolutions, across decades

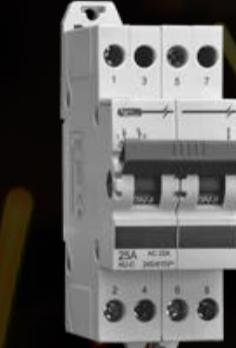
## Balanced end-market exposure



# With best-in-class **technology** meeting the needs of the Indian market



Final Distribution - Circuit breakers



Power Distribution products



Med. Voltage Products & Equipment



Pump starters and controllers



Contactors



Industrial Starters and AC Drive

**SMARTCOMM**  
Predict

# Our Prestigious Projects



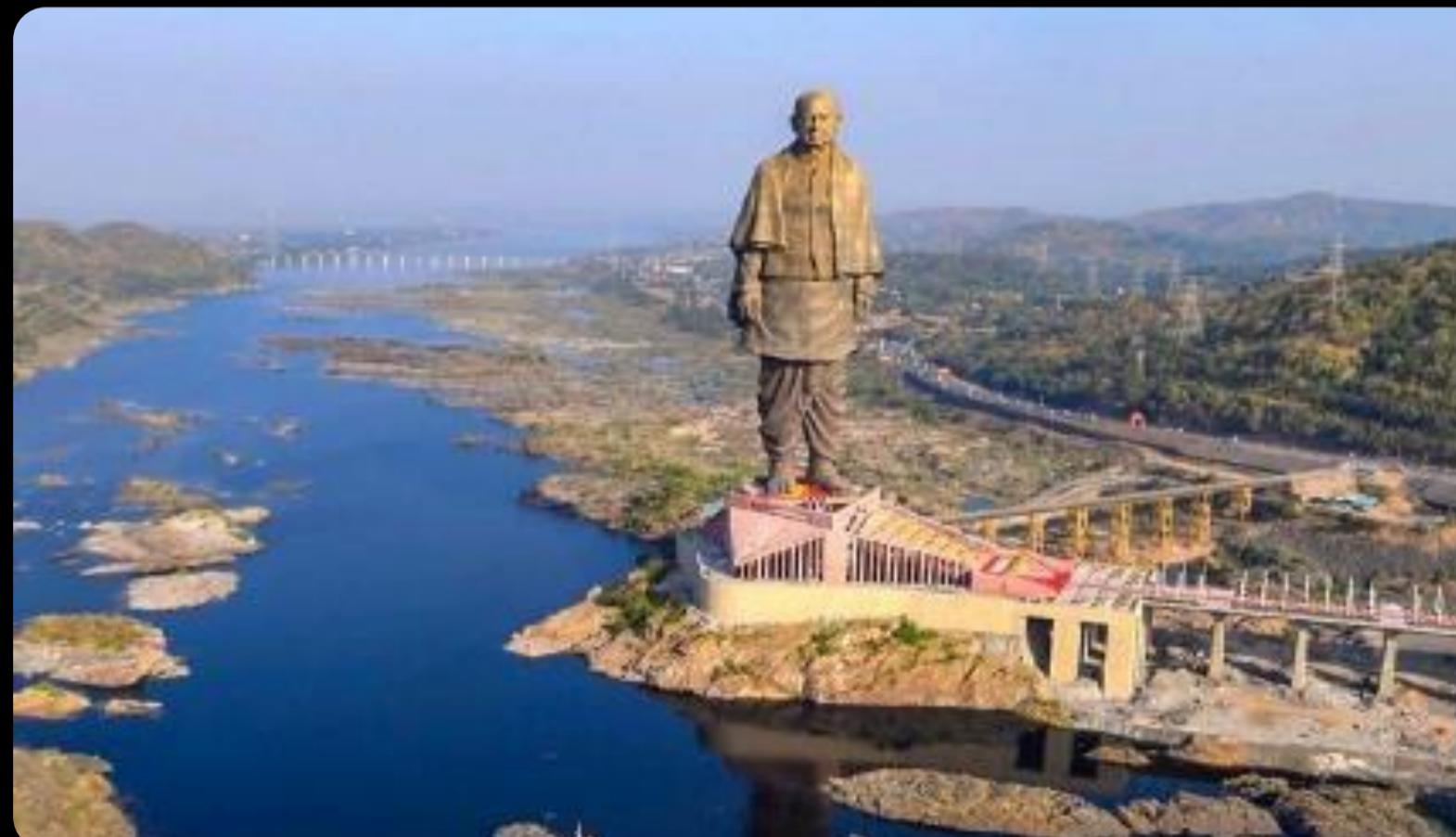
**Major Airports – Mumbai, Delhi, Bangalore  
Present across all smaller Tier 2 airports**



**Overhead Metro stations across major Metro Projects**



**Healthcare segment including all AIIMS projects**



**The Statue of Unity  
World's largest statue**



**INS VIKRANT -  
India's first indigenous aircraft carrier**



**Amrita Hospital  
Asia's largest hospital**

We are thrilled to  
embark on this  
exciting journey with



## An opportunity for a new chapter

L&T divestment program

### Schneider Electric as the “best home”

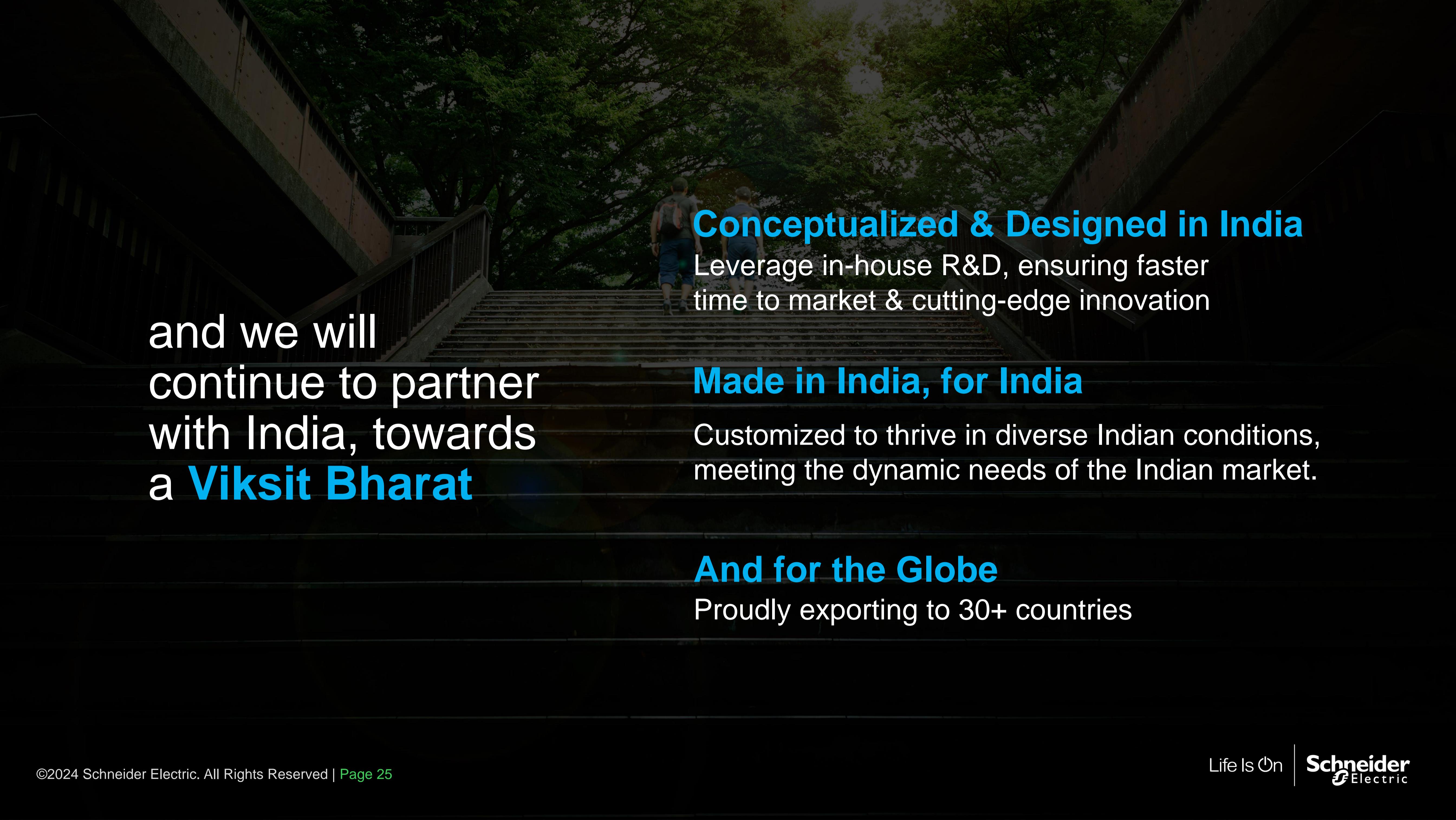
Among several large international  
players showing their interest

### Technology and investments

Brought by Schneider Electric from day 1

### Empowerment and accountability

Trusting Lauritz Knudsen deep  
coverage and market understanding



and we will  
continue to partner  
with India, towards  
a **Viksit Bharat**

## **Conceptualized & Designed in India**

Leverage in-house R&D, ensuring faster  
time to market & cutting-edge innovation

## **Made in India, for India**

Customized to thrive in diverse Indian conditions,  
meeting the dynamic needs of the Indian market.

## **And for the Globe**

Proudly exporting to 30+ countries

# Unrivaled reach & Partners network





c.65%

Revenues  
through  
Partners



Unprecedented  
Distribution Network



Panel Builders &  
System Integrators



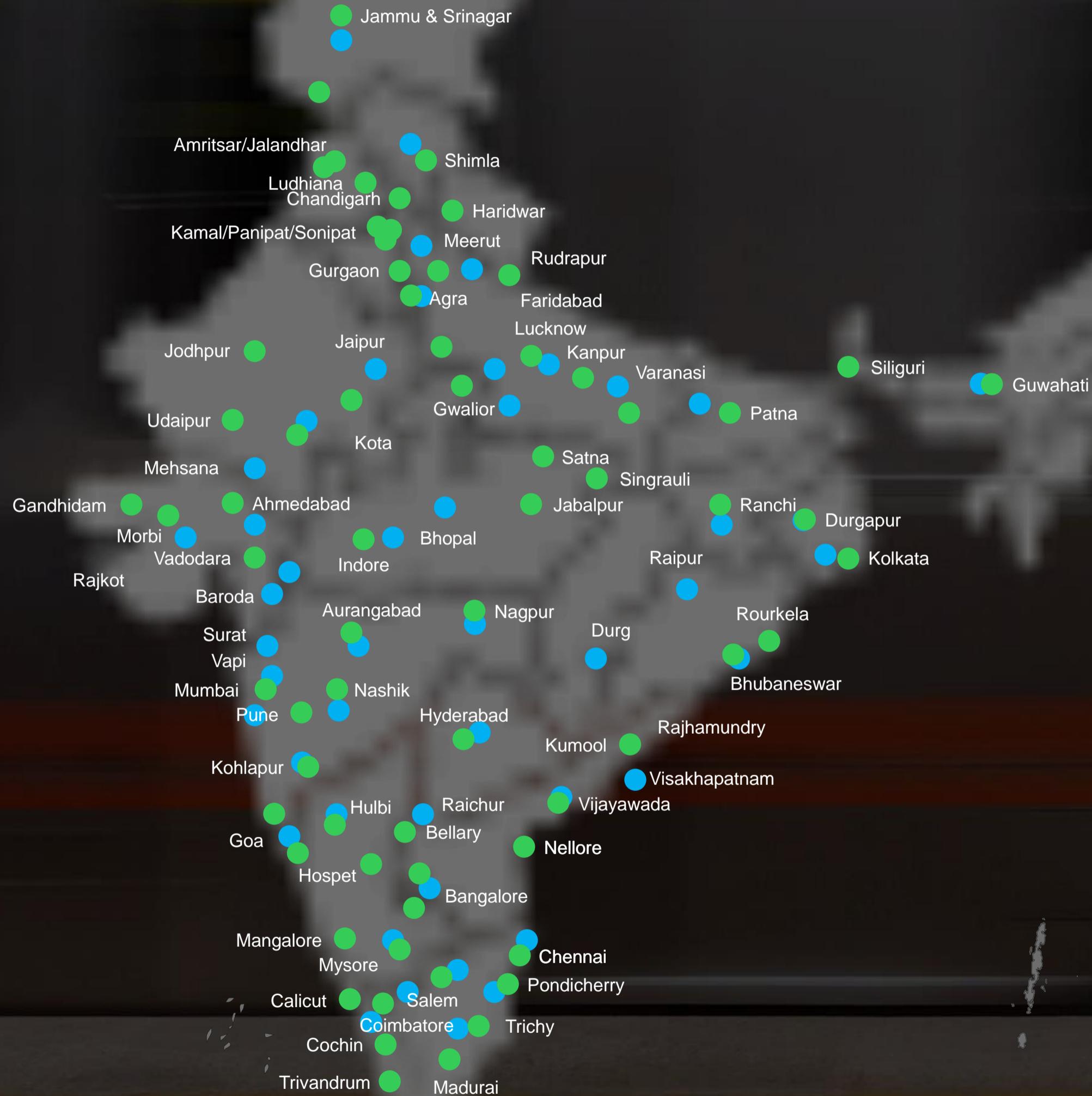
Electricians

Presence throughout the market  
**from Tier 1 cities to Rural areas**

Unique ecosystem based **on  
long-term partnership model**

**Complementary** Distributors network  
with no overlap

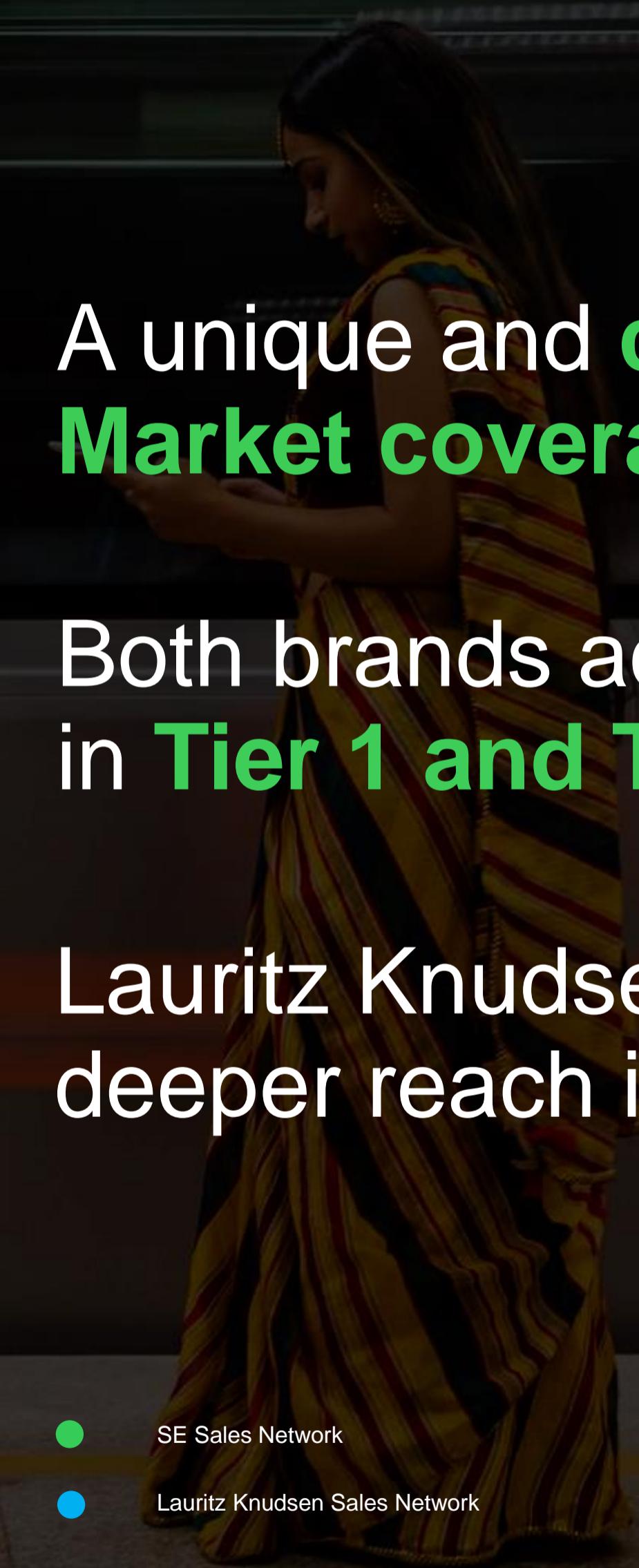
**Multi-generation** partnerships  
*“generations worth of trust”*



# A unique and complementary Market coverage

Both brands actively present  
in **Tier 1** and **Tier 2**

# Lauritz Knudsen brings a deeper reach in **Tier 3, 4 & Rural**



# LUMINOUS

## KEY GROWTH DRIVERS

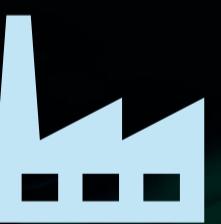
...TO SHAPE THE  
“LUMINOUS OF TOMORROW”



Established as the  
“Brand of Choice”



Focused on solar & prosumer markets



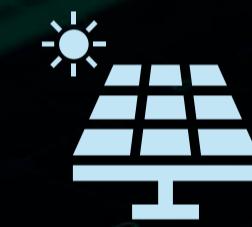
Technology & Manufacturing:  
Modernization of industrial footprint and  
increased R&D capability



Core Inverters & Batteries  
Future ready tech & innovation bets-  
*Li-ion integrated offers for hi-tech  
prosumers*



Solar Segment Focus  
Accelerate energy self-sufficiency & cost  
savings through DERs\*



International Business  
Leverage product capabilities to deeply  
penetrate select International markets



# Prescription and Systems approach across end-markets

# Smart Grid

Schneider Electric enables Grids to speed up the Energy Transition towards Net Zero



## Sustainability

Reduced carbon footprint



## Digital for Efficiency

Increased energy efficiency



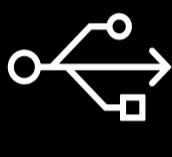
## Resilience

Improved Infrastructure resilience



## Grid flexibility

Empowered Prosumers



## Availability

Increased access to power



**TATA POWER**

## Leveraging our unique portfolio

Of Schneider Electric offers to Grids, including ADMS advanced solution to support Tata Power Electrical distribution system of Northern Odisha

## Addressing the demand for reliable and efficient grids

Control of distribution network of 200+ substations to improve system reliability and efficiency

# Infrastructure

Schneider Electric driving seamless operations and enhance traveler experience while meeting sustainability, and digitization challenges



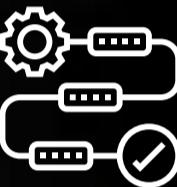
## Sustainability

Reduced carbon footprint



## Central Operations

Achieving integrated operations



## Process Optimization

Enhanced operational efficiency



## Facility and Energy Management

Maximized facility uptime and energy efficiency

## Cutting-edge solutions to monitor and control airport

Complete building management solutions  
Electrical SCADA and ADMS to significantly boost the airport's operational efficiency and sustainability



Noida  
International Airport

80 new airports

to be built in the next  
5 years in India

By 2050  
Carbon Neutrality  
at Airports

## Our commitment to making airports sustainable

Innovative solutions to optimize energy efficiency, reduce operational costs, and minimize environmental impact - integrating renewable energy sources

# Data Centers

Schneider Electric will act as a key enabler of India's transition to a greener, more scalable data center future



## Sustainability

PPA, Consultancy and circular economy



## High Availability & Reliability

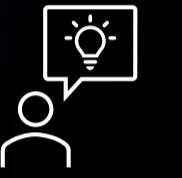
Scalability, modularity & standardization

~1GW  
available installed capacity by 2024



## Digitization

Of Data Center life cycle



## Innovation

Built to suit solutions through advanced technologies – AI, Big Data & IoT platforms

## Princeton Digital Group

### 230 MW capacity expansion plan

Supported by Schneider Electric solutions

### Uptime Tier III & IGBC platinum DC certified

Lowering carbon footprint & enhance energy efficiency

<sup>1</sup> APAC Data Center; set to see strong growth and AI Uplift by BofA Securities & 2024 Data Center outlook report published by JLL

# Buildings

Schneider Electric enables digitization & electrification from a single building to an entire real-estate portfolio



## Sustainability

Reduced carbon footprint



## Hyper Efficient

Increase energy efficiency



## Resilient

Improved operational resilience



## People Centric

Enhance occupant experience and well-being

~50%

of the buildings required by 2040 in India have yet to be built

>30%  
of energy is wasted in buildings

## Schneider Electric Digital Power Train

Reinforce safety measures by integrating Schneider Electric power logic heat tag into Prisma Set switchboard

## Safety always at the forefront of Mahaveer projects

Mahaveer Gateway projects offers modern office, retail places and luxury homes designed to meet demands of today's living standards



**MAHAVEER®**  
Finest Homes & Honest Practices

# Industry - Cement Plant

Schneider Electric, a key enabler of India's "National Infrastructure Pipeline" towards sustainable nation building



## Sustainability

Cutting edge solution for achieving sustainability targets and lowering CO2 emissions



## Efficiency, Uptime & Reliability

Fully automated plant with scalability, modularity and availability

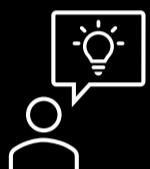
## Digitalizing 7 of Top 10

Cement Manufacturers in India



## Digitization

Enhanced operational efficiency, real-time visibility with secure operations



## Innovation

EcoStruxure Digital solutions & technologies with seamless interface of energy and process data

A leading  
**Cement**  
**Manufacturer**

## Accelerating 'Smart Manufacturing' in Cement Industry

Operated and Maintained through Schneider Electric Automation, Digital & Electrical solutions

## Reduced Emissions Improved Plant Performance

State of Art IoT 4.0 enabled Cement Manufacturing - powered by "EcoStruxure Power and Process"



# Our Software, Services and Sustainability offerings are a real differentiator on the market



# Pimpri-Chinchwad Municipal Corporation (PCMC) AVEVA

## Smart Cities

**The smart city vision for PCMC was to create a data-driven approach**

To deliver on PCMC's ambition of becoming India's most livable city by 2030 and a lighthouse within the '100 Smart Cities' mission

**Unified Operations Center sets new standard in smart city innovation and efficiency**

driving a 15-20% reduction in usage and emissions as a result of the smart metering energy management application

smart city system is enabling traffic congestion cuts by 20-25% and pollution reduction by a similar amount

# Going beyond the scope of operations in sustainability



## Strategize

Climate and energy  
domain expertise



## Digitize

Leading lifecycle software  
and digital services



## Decarbonize

No. 1 in energy management



Piramal

Enterprise-level  
**Energy Efficiency**



Enterprise Efficiency  
Services | ~40,000 MT  
**CO<sub>2</sub> Reduction**/annum



Marriott

Energy Sustainability  
Partnership for **136 Hotels**  
across India



**Renewable energy**  
procurement  
consulting

# Ready to deliver our ambition for Schneider Electric in India

We are ready to address customers needs **across all of India**

We have built a platform for innovation to capture growth opportunities  
**in India** and to support **the rest of the world**

We are uniquely positioned to **support Digital India, fast growing Infrastructure, Industrial expansion and sustainability roadmap execution**

Powering India's sustainability  
and growth for global

# IMPACT

**India Investor Event**  
December 2024



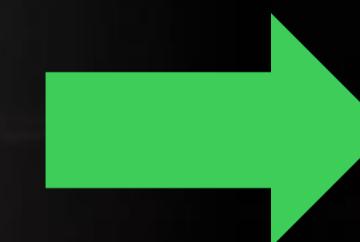
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**Schneider**  
Electric

# Schneider Electric revenues in India

FY2022  
**€2.0bn<sup>1</sup>**

External sales to India



FY2023  
**€2.2bn<sup>1, 2</sup>**

External sales to India

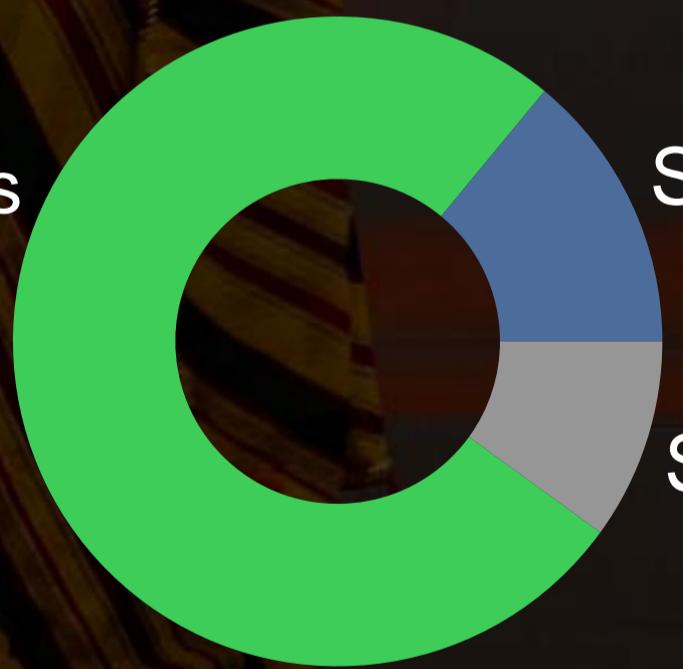
Energy Management



FY23 India sales by business

Industrial Automation

Products



FY23 India sales by Business Model

Systems

Software & Services

1. Excludes export sales by Indian entities

2. The JV entity owned 65% by Schneider Electric and 35% by Temasek (Schneider Electric India Private Limited) had statutory revenues of c.€1.6bn in FY2023 including export sales

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