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**Integration and innovation setting path for growth in
Public Address and Conferencing market**

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the Bosch Security Systems division, part of
Robert Bosch GmbH
at the “Prolight + Sound” press conference
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Good morning everyone,

Thank you very much for joining us at our press conference here at the Prolight and Sound in Frankfurt. My name is Johan Jubbega, and as Senior Vice President Sales EMEA, I'll be giving you an overview of our latest news, including two new groundbreaking products.

But first, let us take a quick look at the markets we're talking about – starting with **public address**. This market had a global volume of about 1.4 (one point four) billion euros in 2012, 406 million of which came from the EMEA region. Here we saw large differences between the countries because the market is closely linked to the construction industry. By 2020 the public address sector will have grown globally by around 38 percent compared to 2012 with an annual growth of 4.7 percent globally and 3.2 percent in the EMEA market. This development is favorable for Bosch and we consider ourselves well positioned.

If we now turn to the **conference market**, we see a similar development. The global volume was 231 million euros last year, with EMEA contributing 104 million euros. Looking towards 2020, we predict a global growth of 43 percent compared to 2012 with an annual growth of 5.2 percent globally and 3.3 percent in the EMEA market. Bosch Security Systems has a clear lead here thanks to one of the most comprehensive portfolios available. With the recent introduction of the Bosch HD Conference Dome and Bosch webcasting solution, we are the only provider on the market to deliver a single-brand solution for an entire conference setup.

Our plan is to continue to grow in both areas and we're already well on track. Bosch Security Systems achieved a turnover of roughly 1.5 billion euros in 2012 – that's about four percent more than the previous year and above the market development.

I'd now like to address one specific growth aspect that will become very clear at this show - a strong orientation towards our

customers and their needs in terms of security and communication. Thereby standing in the tradition of our founder, Robert Bosch who said: “Anyone who stops getting better, has stopped being good.”

And indeed an important factor for getting better is integration – bringing single components together to form a holistic solution. This applies to our technology as much as to our presence here. For the second year in a row, Bosch Security Systems is exhibiting the combined power of our three brands on the communications market, Bosch-DYNACORD-Electro-Voice, under one roof. Our future-proof connectivity via the OMNEO platform and the increasing cooperation between these brands will further enhance our leading position in the professional communication market.

Let me give you a short update on the aforementioned OMNEO technology. It is linked to all three brands, significantly influences our market position and is part of the Bosch DNA – technology.

The OMNEO architecture provides both audio transport and system control over standard IP networks offering a powerful, integrated multi-vendor solution. OMNEO’s program transport component, “Dante™” is the result of a partnership between Bosch and Audinate Pty, Australia and ensures the high quality required. “Dante™” has already been widely adopted. It is also the right choice for the future as it will be fully compliant with the emerging AVB (Audio Video Bridging) standard. The system control component – “OCA,” for Open Control Architecture – has been developed by Bosch Security Systems in cooperation with the OCA Alliance.

OMNEO was first introduced at Prolight and Sound 2012. Using the new RCM-28 module OMNEO has been integrated in the Electro-Voice Tour Grade and DYNACORD PowerH Series of power amplifiers. We have now made the first step towards enabling our customers to enjoy fully standardized media networks, where not only Bosch equipment, but also products from various other manufacturers interoperate smoothly.

So much for the overall aspects. Let me now update you on the Bosch side before handing over to Robert Hesse, Vice President Sales EMEA for DYNACORD, Electro-Voice and RTS Telex.

Let's start with Public Address

If we take a look at technology, we see a trend towards IP and interconnection. This means new developments for the voice alarm market will be IP driven. We will be providing our (current) customers with solutions using IP for both project upgrades and new projects. Alongside this, we see a growing need for foreground sound, a market segment that we're actively addressing with an expanding portfolio. The integration of announcement, foreground music and live performance or speech with a need for user-friendliness and more DSP power, was a clear call for innovative solutions to enhance growth in this segment as well.

In Conference solutions

We see a clear trend towards media integration and connectivity of audio and video, the linking of separate locations and the need to access content both on the internet and within meetings. To maintain and expand our leading position, Bosch is presenting a complete OMNEO-based multimedia conference system here at the Prolight + Sound. The world's first fully IP-based multimedia system designed to **inform, impress and inspire**. The integration of audio, video, meeting content and internet access are key drivers for this development.

There is one more thing that provides us with a unique market position for conference systems – the Congress Rental Network (CRN). CRN is a worldwide network of high-quality rental companies that use Bosch conference equipment. Thus, customers can buy a fixed basic installation for their day-to-day use and enjoy easy worldwide access to consistently high quality rental stock for larger events. This was proved at the COP 18 meeting in Qatar which made use of both permanently installed and rented equipment from Bosch and CRN. Then again in 2012 during the Danish

EU presidency. To give you an idea: Denmark held more than 160 conferences at three different venues during the six-month period supported by our Danish CRN dealer Teletech Conference Communication. CRN serves some 40,000 events each year and is active in all parts of the world – just like Bosch.

So, let me now introduce two exciting new solutions in Public Address and Conference. First off is PLENA matrix Digital Sound System.

PLENA matrix

... is tailored to a wide range of applications, including live music, background music, high-demand speech environments and zone announcement. It delivers fully featured digital audio control, with maximum flexibility and reliability. Now even small scale clients like gyms, small hotels, restaurants, bars, business centers, retail stores and schools, can experience professional audio in an extremely cost effective and easy-to-install platform. PLENA matrix' strengths are ease of operation and cutting-edge performance. The main benefits include:

- Straightforward setup and configuration with its one-cable approach
- Wireless control via IOS mobile devices
- Powerful Digital Signal Processing to ensure premium sound
- Intelligent energy management through use of motion detectors

It is suitable for all Bosch, Electro-Voice, and DYNACORD loudspeakers for music, speech and announcements.

The next innovation we are presenting today is the DCN multimedia, which integrates audio, video, documents and internet access in one single device. DCN multimedia is thus set to change the game in conferencing by enabling attendees to focus on content rather than tech-

nology and turns them into active participants rather than listeners. It follows a simple philosophy: to inform, to impress, and to inspire.

To inform: using multimedia conference devices with high-resolution touch-screens for retrieving and viewing multimedia content like documents and presentations, and to access the Internet for additional information. Thus making it easier for delegates to convey their message, get their story across, to explain and convince.

To impress: Not only with its elegant design, unobtrusive high-directive microphone and excellent ergonomics, but also with its extremely high sound quality which makes speeches easier to follow and understand - DCN multimedia is the first IP-based conference system built on the OMNEO media networking architecture. Operating on fully standardized routable Ethernet networks, DCN multimedia guarantees flexibility, cost-effective installation and maintenance.

To inspire: DCN multimedia helps participants become inspired by the subject being discussed. It encourages them to get involved, and to contribute more efficiently to the meeting. At the same time, the system inspires investors. It is based on an open platform, making it extremely scalable so that it can grow as needs evolve. The multimedia conference devices can be easily expanded by adding software functionality without the need to change hardware. Third-party or custom-made apps can be added to enhance the meeting experience even further. The system also inspires with features that reduce paper consumption and save electricity thus contributing towards a better environment.

In short, DCN multimedia focuses on “comfort for all”: for investors, participants, installers and technicians – making it ideal for city councils, regional councils and boardrooms.

With DCN multimedia, Bosch is continuing its tradition of groundbreaking conferencing solutions. We were the first to introduce a

fully digital conference system (DCN), which set the industry standard more than 20 years ago – and like all our products, it is backed by the world-renowned Bosch customer support and service commitment.

There is another aspect that applies to both DCN multimedia and PLENA matrix that I briefly want to touch on: Design. You will find in both solutions an elegant modern design that fits different location styles. This has resulted in several international design prizes, like the “red dot award: product design”, which Bosch recently received for the DCN-D discussion unit or the iF award, to name just two.

So, I hope you will be informed, impressed and inspired by these exciting product introductions. Now I would like to hand-over to Robert Hesse, Vice President Sales EMEA for DYNACORD, Electro-Voice and RTS Telex, enjoy the show and feel free to ask me or the team any questions while taking a closer look at PLENA matrix and DCN multimedia.

Thank you.