

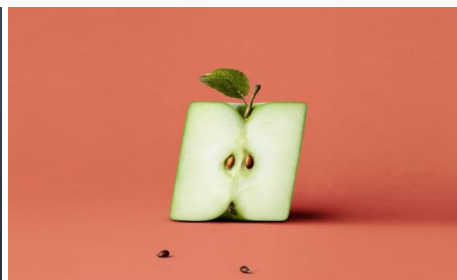
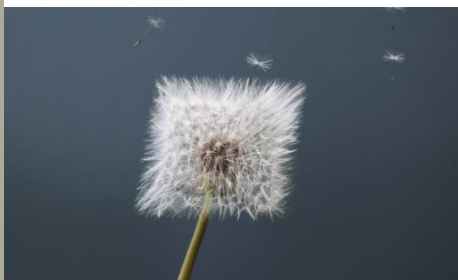
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JAHRE

Bechtle AG
1983-2013

Ihr starker IT-Partner.
Heute und morgen.

BECHTLE

Q3 AND 9M FY2013



Bechtle AG

Neckarsulm, 14 November 2013

AGENDA.



- Economic Conditions
- Corporate Development
- Bechtle Share
- News and Updates
- Forecast for 2013



Macroeconomy.

- General economic downturn in EU halted, but development still slow. GDP growth in Bechtle countries fluctuating between -0.1 % and +0.7 %.
- Economic growth in Germany slowing; GDP increased by 0.3 % in Q3 after growth of 0.7 % in Q2.

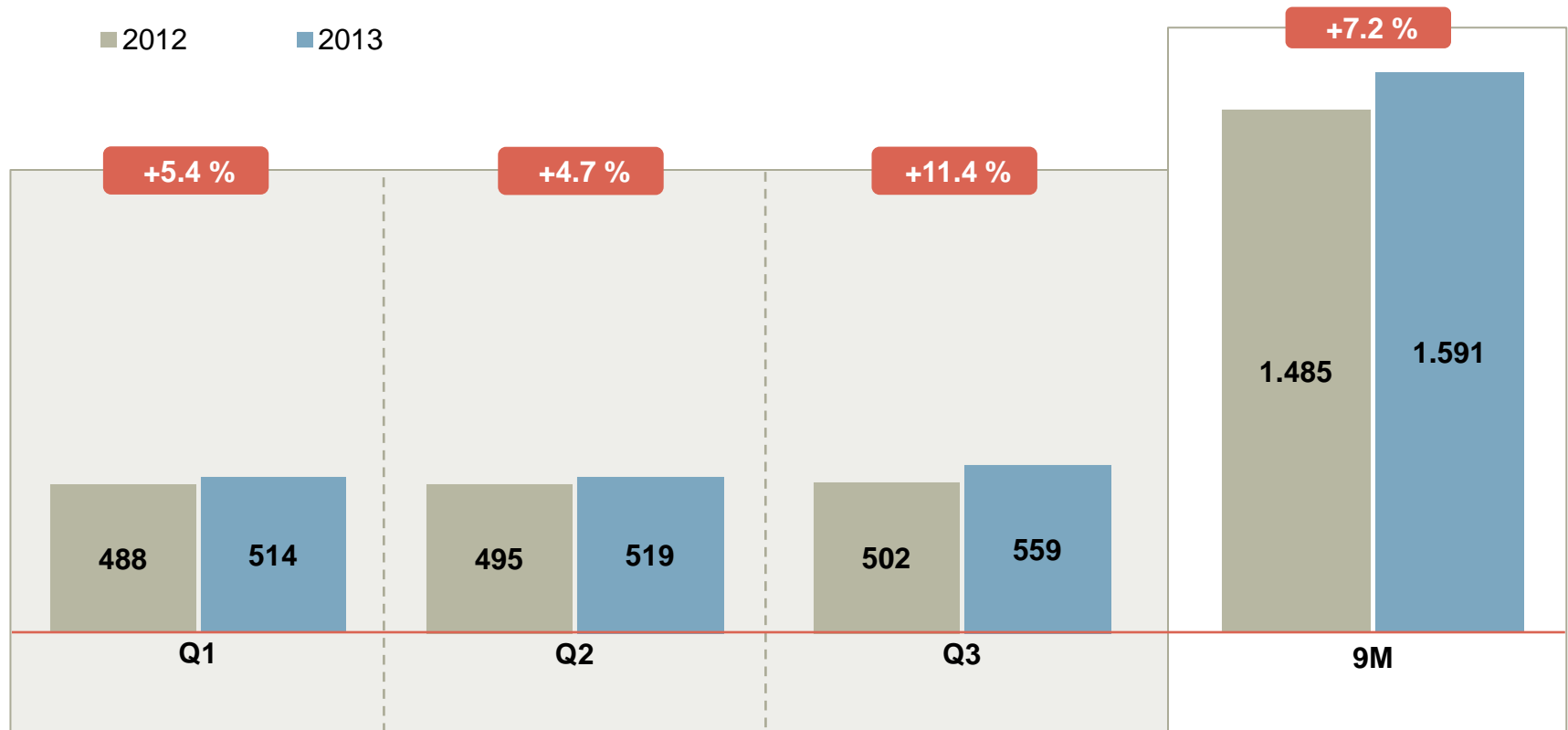
Sector.

- PC sales down by 13 % in Western Europe.
- Positive shift in economic sentiment in the IT sector in Q3.
- In particular, forecasts for the next three months are much more upbeat.

Conclusion.

- Bechtle has shown above-average market growth, also in comparison with the overall market situation.
- The domestic German market is once again the driving economic force.

GROUP REVENUE DEVELOPMENT. 2013 vs. 2012 by quarter

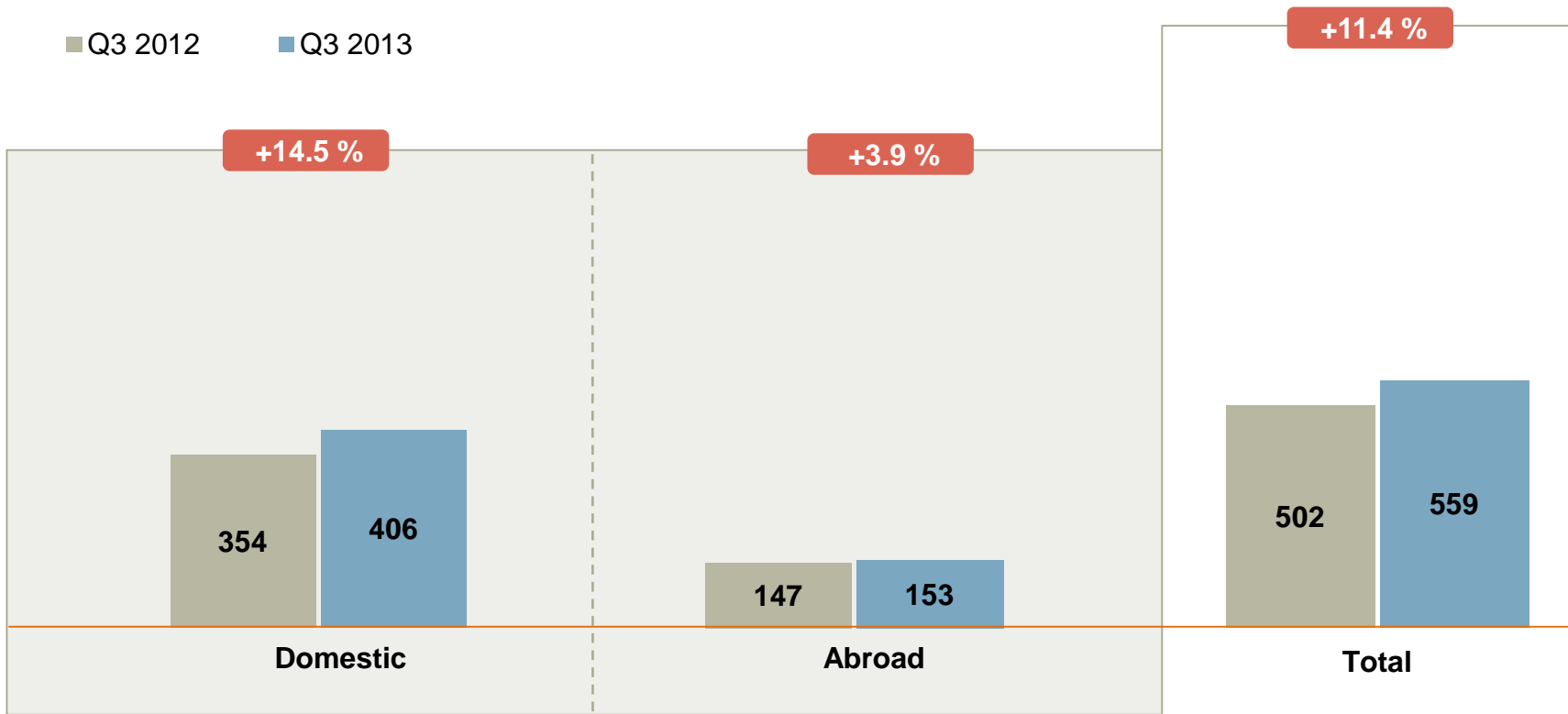


[€m.]

 **Excellent revenue growth in Q3.**

REVENUE DEVELOPMENT.

By region: Q3 2013 vs. Q3 2012

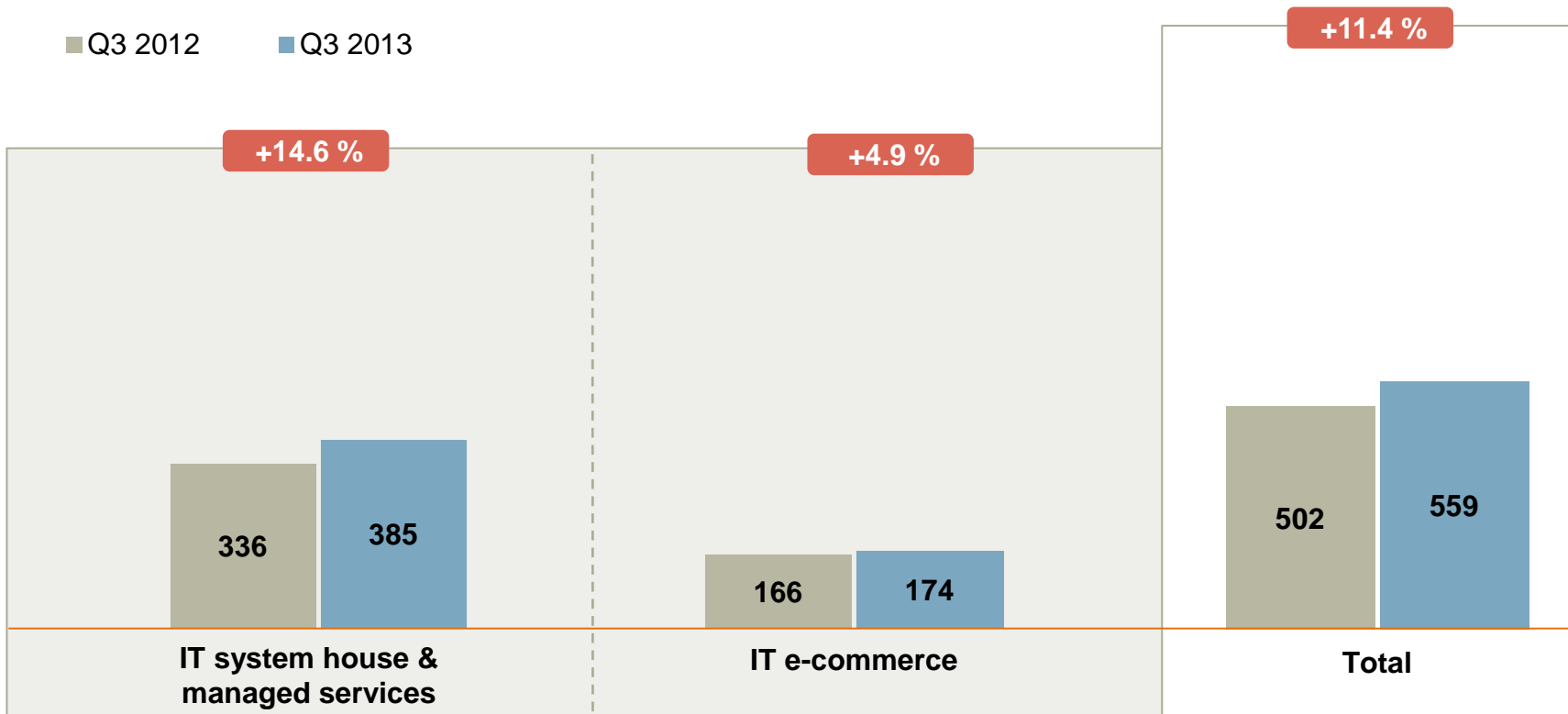


[€m.]

 **Significant upwards economic trend in German domestic market.**

REVENUE DEVELOPMENT.

By segment: Q3 2013 vs. Q3 2012

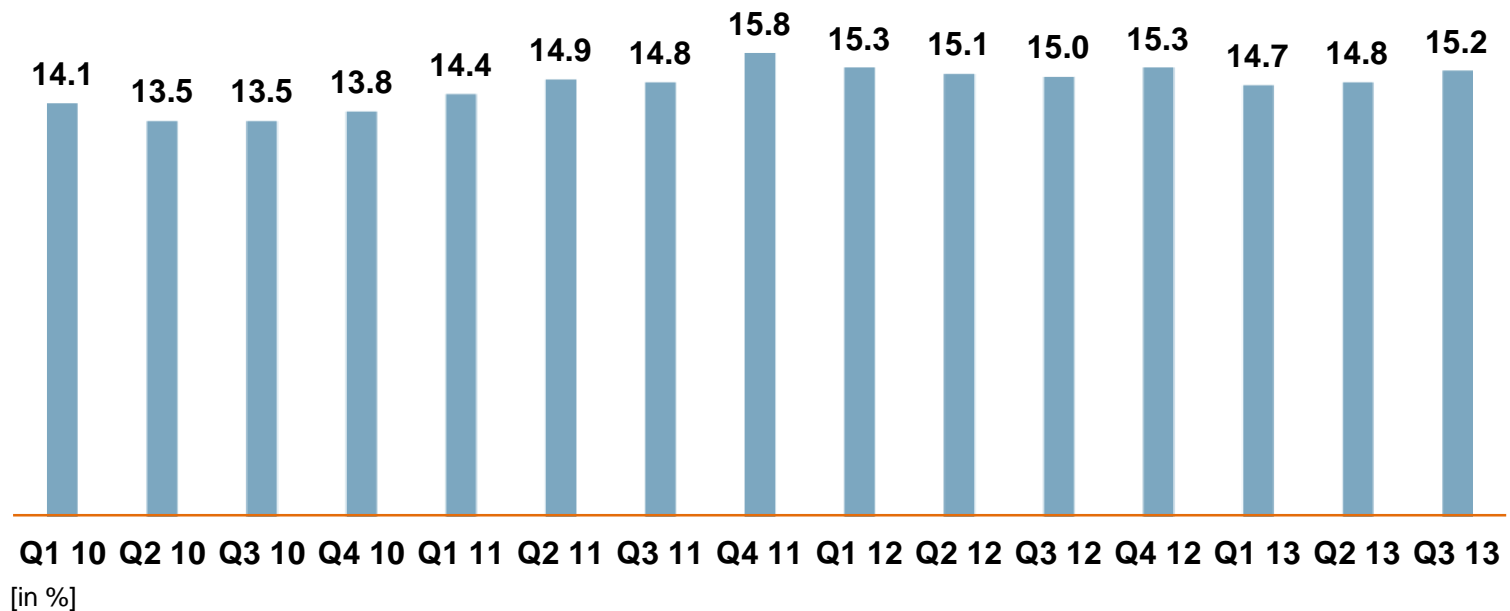


[€ m.]

German system houses drive growth (+16.7 %).

GROUP GROSS MARGIN.

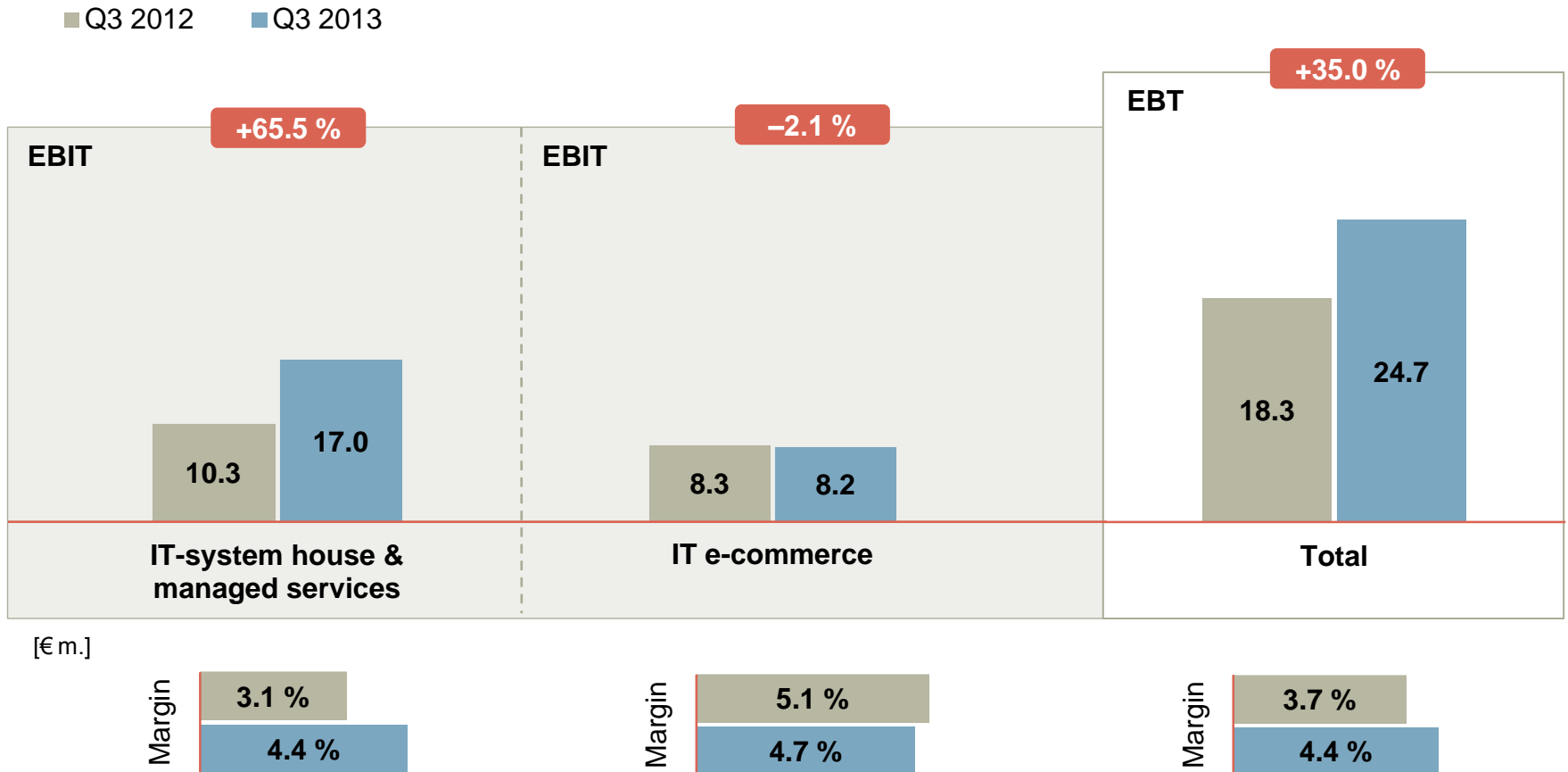
Development since Q1 2010



High gross margin in Q3, above previous year's margin.

EARNINGS DEVELOPMENT.

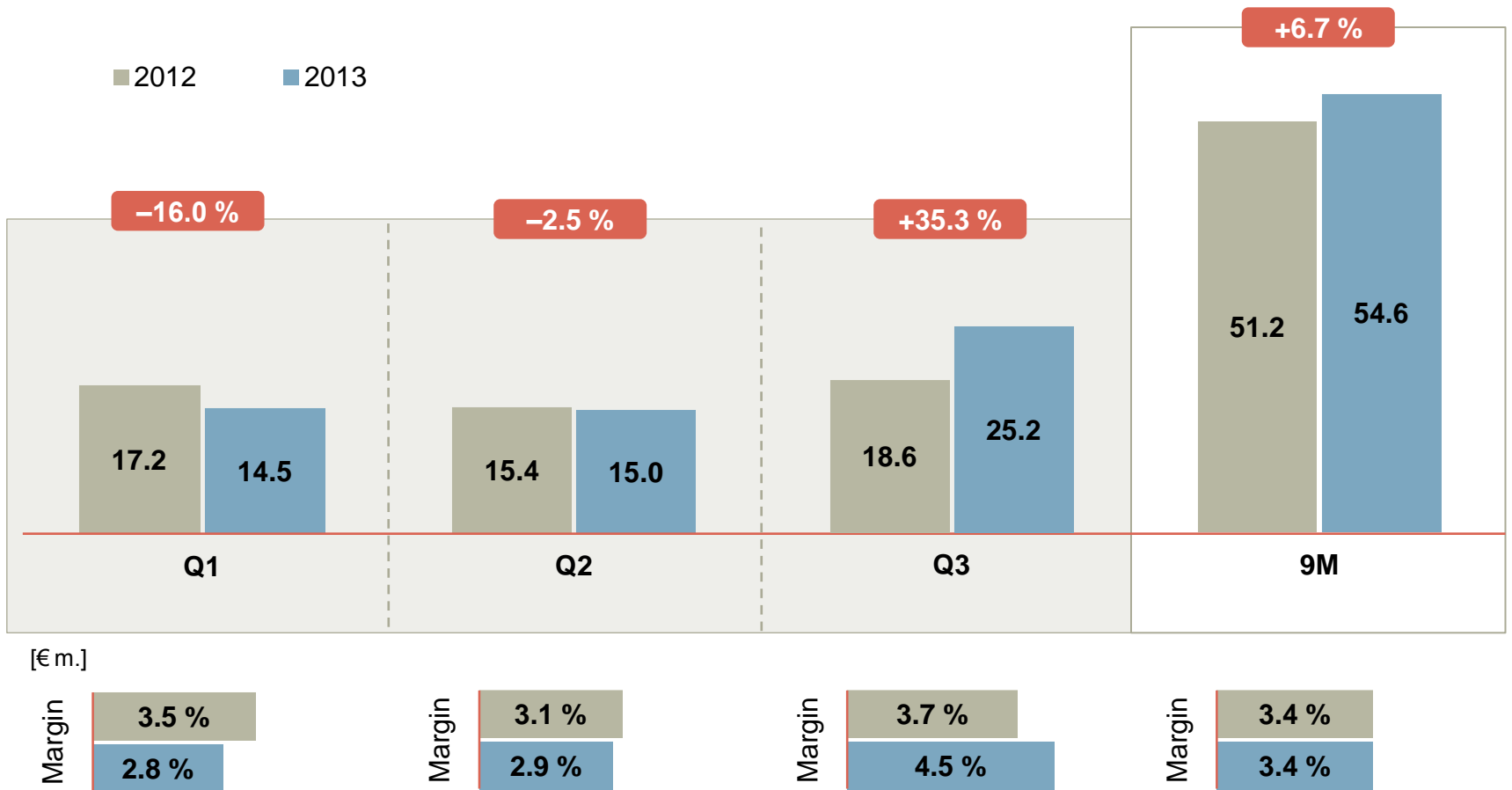
By segment: Q3 2013 vs. Q3 2012



➤ **System house EBIT increases notably. E-commerce margin favourable.**

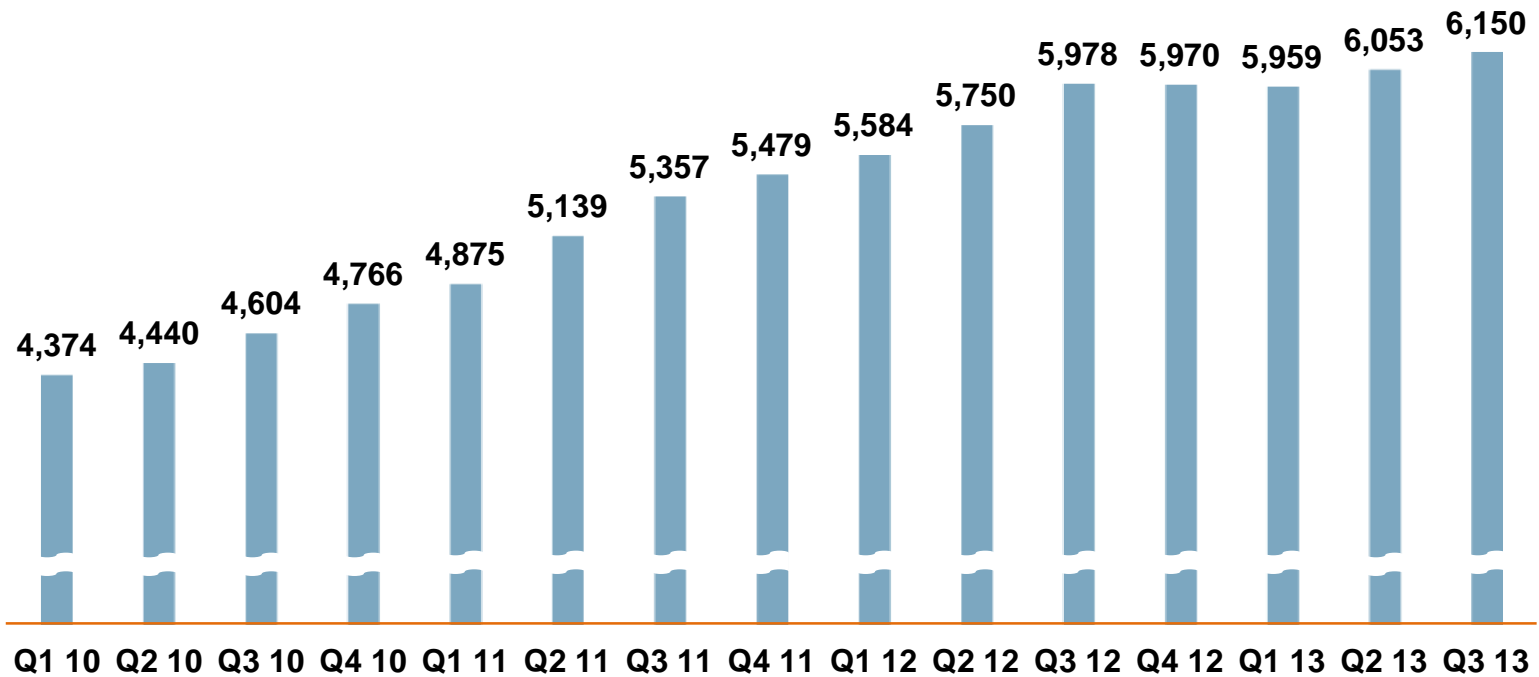
GROUP EARNINGS

2013 vs. 2012 by quarter



➤ **EBIT shows solid growth over previous year's.**

GROUP HR DEVELOPMENT. Since Q1 2010



➤ **Employment growth has slowed since Q3 2012.**

THE LATEST DEVELOPMENTS AT BECHTLE.

News and updates (1/3)



Further Success in Public Sector Division

- Bechtle won the tender for the German Bundeswehr again and was able to sign a contract with Dataport for the second time in a row.
- Following the recent mobile equipment contract, Bechtle has now also won the European Commission inter-institutional tender. The contract is worth around 112 million euros in total.

Acquisitions.

- Bechtle has expanded its market presence in Austria with the acquisition of the Vienna-based Sitexs-Databusiness IT-Solutions GmbH, a leading IT systems integrator and security specialist.

THE LATEST DEVELOPMENTS AT BECHTLE.

News and updates (2/3)



Personnel.

- Citing personal reasons, Klaus Winkler stepped down as Chairman of the Supervisory Board on 31 October. Gerhard Schick will take his place.

High Number of Trainees.

- In Germany, the percentage of trainees entering the market rose to a healthy high of 9.4 %. As of 30.09.13, Bechtle employed 480 young apprentices, 434 of them in Germany.

THE LATEST DEVELOPMENTS AT BECHTLE.

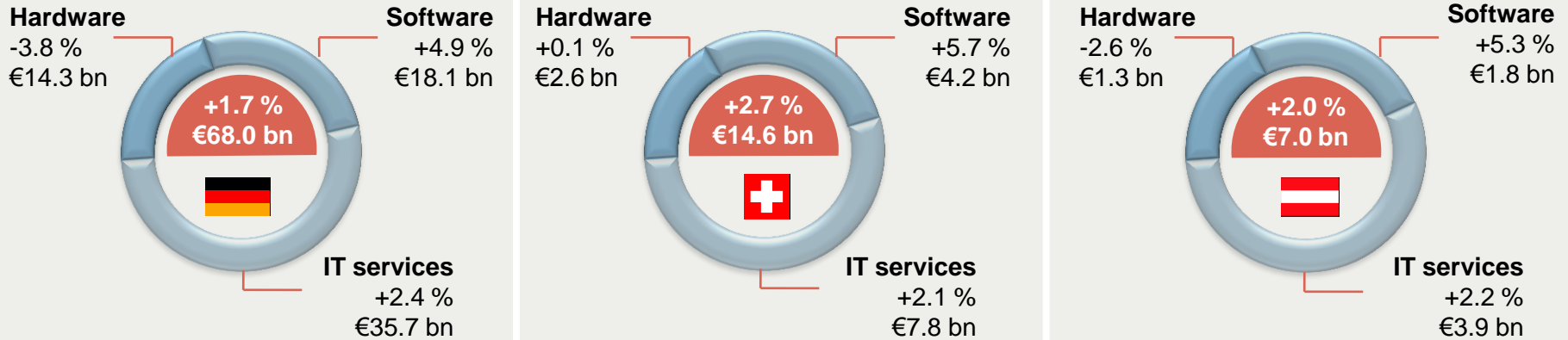
News and updates (3/3)



Cloud Computing.

- Bechtle launched Bechtle Secure Cloudshare, a secure business-class file-sharing platform, as an alternative to popular cloud services.
- Citrix names Bechtle Cloud Advisor.
- As of July 2013, Bechtle is the first German system house to partner with Microsoft to offer businesses a private cloud model.
- To date, nearly 60 customers use cloud solutions from Bechtle.

General Economic Conditions. IT sector 2013



Source: EITO October 2013

Development of IT Market in D-A-CH Region in 2013:

- In total, the market is projected to grow +1.9 % to €89.7 bn (PY: +3.4 %).
- Hardware sales are in decline at -3.2 %, while IT services are projected to grow by +2.4 %.
- At +5.0 %, software is a growth catalyst.

➔ **Estimated growth has been lowered.**

FORECAST.

Financial year 2013



Revenue.

- Bechtle will generate a significant increase in revenue in the single-digit range.
- Significant revenues from the EU tender will only appear in the Q4 reporting period at the earliest.
- Increased revenues also expected for Q4, however at a slower pace than Q3 due to an excellent Q4 FY2012.

Earnings.

- Noticeable increase of earnings over previous year's.
- The growth rate for Q4 will also not be able to match the same growth rate from Q4 FY2012 due to the strong year-end figures of the previous year.

Employees.

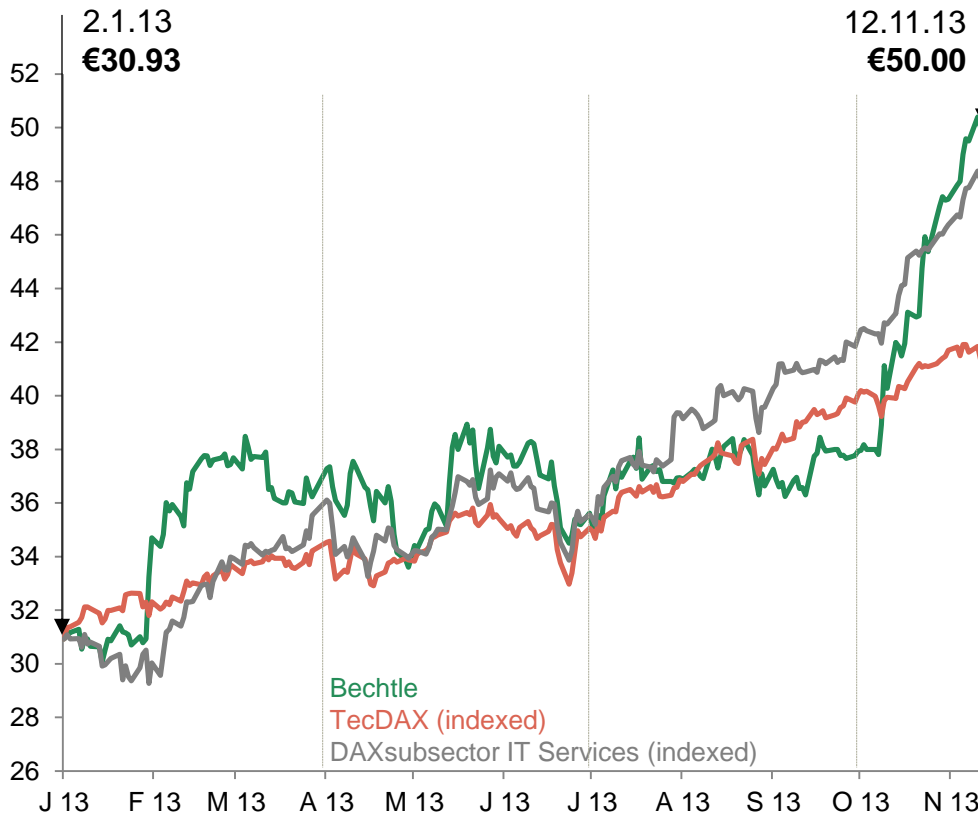
- More moderate growth compared to 2012, not including new employees through acquisitions.

Expansion.

- Acquisitions remain a part of our growth strategy.

THE BECHTLE SHARE.

Performance



Market Figures (12.11.2013)

Market capitalisation 1,050 million euros

Performance:

- Bechtle 61.7 %
- DAX 16.7 %
- TecDAX 33.6 %
- DAXsubsector IT Services 55.4 %

 Share reaches new all-time high.

Ihr starker IT-Partner.
Heute und morgen.



ANY QUESTIONS?

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