FCOS Press Briefing

Giesecke & Devrient at a glance

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Card Segment

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Our Vision:

Giesecke & Devrient as the technology and global leader when it comes to protecting the value of an asset.

Everywhere around the world, people carry with them items incorporating technology made by G&D.
Our Two Pillars Form a Solid Foundation

Banknote Segment

- Banknote Paper and Printing
  - Banknote and Security Printing Division
  - Paper Division

- Currency Automation and Services
  - Cash Center Solutions Business Field
  - Cash Point Solutions Business Field
  - Security Features Business Field
  - Cash Management Services Business Field
  - Service and Maintenance Business Field

Card Segment

- Cards and Solutions, Products and Markets
  - Payment Division
  - Industry/Government Division
  - Telecommunications Division
  - Strategic Marketing
  - Research & Development

- Cards and Solutions, Operations
  - Card Segment Solutions
  - Card Technology
  - Logistics
  - Controlling

Revenue split in % of total revenue

2002
- 54% Banknotes
- 46% Cards

2003
- 56% Banknotes
- 44% Cards
Group Sales and Employee Figures

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<tr>
<th>Year</th>
<th>Sales in millions of euros</th>
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Group Presence Around the World

Revenue split in % of total revenue

1994
- Germany: 57%
- Others: 43%

2003
- Germany: 87%
- Others: 13%

Revenue
- Americas: 19% (1994: 23%)
- EMEA: 63% (2003: 64%)
- Asia-Pacific: 18% (2003: 13%)
- Others:
- Germany
- Others
Products and Services

**Banknote Segment**

- **Paper and Printing**
  - For banknotes
  - For ID systems
  - For product security and brand protection
  - Security foils

- **Currency Automation and Services**
  - Banknote processing systems and identification modules
  - Security features and sensor technology
  - Service and technical support

**Card Segment**

- **Cards and Solutions**
  - For mobile communications
  - For electronic payment transactions
  - For banking industry and government
  - For information and network security

  - ID and secure personalization systems
  - Advanced logistics services
Cards and Solutions

Products

SIM cards, tools, solutions and SIM lifecycle management systems

Payment systems
Complete system solutions for international payment transactions

ID systems and secure smart card solutions

Target groups

Mobile network operators, Mobile service providers

Central banks
Commercial banks
Credit card companies

Governments and their authorities, industry, health care systems, public transportation providers
G&D is holding a leading position in the global smart card market

Key facts

- Market position 2004: No. 3 card vendor world-wide
- Market share 2004: 17% (>200 Mio pcs. microprocessor cards delivered)
- Revenue card segment 2003: € 461m
- Global presence with solution-oriented business approach
- “Global Competitive Strategy Award” 2003 awarded by Frost & Sullivan; only top 5 card vendor to constantly gain market share since 1997

G&D - Card Segment

Cards and Solutions

- For mobile communications
- For electronic payment transactions
- For banking industry and government
- For information and network security
- ID and secure personalization systems
- Advanced logistics services
security at work.

Thank you for your attention.