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Capital Markets Day 2026

Kontron Group

September 17, 2026

Vienna

Welcome & Introduction

Hannes Niederhauser
CEO

Clemens Billek
CFO

Agenda

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Time	Session	Speaker
9:00-10:00	**Registration and Welcome Coffee**	
10:00-11:20	Welcome & Introduction	Hannes Niederhauser (CEO) and Clemens Billek (CFO)
	Strategy 2030: Key Messages & Cost-Saving Initiative	Hannes Niederhauser (CEO), Clemens Billek (CFO), Philipp Schulz (CSO) and Martin Rausch (CTO)
	Platform Pillar I – Transportation: Mission-Critical Infrastructure	Richard Neussl and Michael Jeske (EVPs, Transportation)
	Platform Pillar I – Q&A	
	Platform Pillar II – Software: KontronOS & KontronAIShield	Bernhard Günthner and Michael Jacob (EVP and VP, Cyber Solutions)
	Platform Pillar II – Q&A	
11:20-11:30	**Coffee Break**	
11:30-13:00	Platform Pillar III – Defense & Physical AI	Philipp Schulz (CSO) and John Healy (VP, Client Computing Group, Intel Corp.)
	Platform Pillar III – Q&A	
	Platform Pillar IV – 5G NADs	Christoph Caselitz (EVP, Mobile Solutions)
	Platform Pillar IV – Q&A	
	Kontron & Ennoconn: Driving Long-Term Growth Together	Steve Chu (Chairman and CEO of Ennoconn), Nelson Tsay (President of Ennoconn) and Joe Fijak (Global EVP/COO of Ennoconn)
	Executive Q&A – Kontron / Ennoconn	Hannes Niederhauser and Clemens Billek, Kontron; Steve Chu, Nelson Tsay and Joe Fijak, Ennoconn
	Closing Remarks	Hannes Niederhauser (CEO) and Clemens Billek (CFO)
From 13:00	**Networking Lunch on Site**	

Strategy 2030

Key Messages & Cost-Saving Initiative

Hannes Niederhauser
CEO

Clemens Billek
CFO

Philipp Schulz
CSO

Martin Rausch
CTO

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Kontron’s History & Future

Hannes Niederhauser

12 Years Ongoing Transformation

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Continuous shift to higher-margin business

(in EUR m)	2014	2018	2022	2026e	2030e
Focus	IT Services	Embedded	IoT	IoT/Physical AI	Physical AI/SLAs
Revenues	385	991	1,096*	1,600	2,600
Gross margin (%)	32.9%	35.0%	34.2%	42.0%	48.0%
Revenues IT	307	467	396 divested	0	0
Revenues Embedded	78	174	0	0	0
Revenues IoT	0	442	1,096	1,480	1,300
Physical AI / SLAs	0	0	0	120	1,300
EBITDA act. (%)	23 (5.9%)	90 (9.1%)	109 (10.0%)	225 (13.0%)	16.0%
Net income	14	49	56	110	220
FTE	2,219	4,335	4,475*	6,400	10,000
EPS (Cent)	37	70	365*	170	250
Share price (EUR 12/31)	3.22	15.81	15.29	23.22 (06/26)	N.A.

*Divest IT

Trend per Division

H1/2026

(in EUR m)	Revenue@EBITDA	The Future
Industrial	209m @ 8%	Back to growth 2027 > 500m
Communication	86m @ 3%	Stable
ODM	87m @ 0	Strong growth 2027-backlog in, focus EE, unique One-stop-shop: R&D, SW, cooperation with Foxconn
GreenTec	45m @ 7m loss	Major restructuring
Americas	90m @ 3%	Joint Sales channel Foxconn, growth to 25% of revenues
Asia	43m @ 2%	Expect strong growth by cooperation with Ennoconn (CN, SEA)
Defense	111m @ 15%	Ongoing strong growth, increasing margin, 10% of R&D invest (>100 engineers)
Software	71m @10%	Strong growth by CRA to come 2028, 35% R&D invest (600 engineers)
Transport	138m @ 18%	Ongoing growth driven by FRMCS, 20% R&D invest (400 engineers)
Group	**737m @ 84m EBITDA**	

Cost Saving Program Completed in Q3

Reduce EUR 30m in cost

Target

- Achieve annual savings of > EUR 30m
- Reduction of > 500 FTE (mainly GreenTec)
- complete Q3/2026; Back to profits in Q4

Measures

- Hiring freeze – transfer internal FTEs
- Investment stop, max EUR 14m (1%) in 2026
- Reduce German factories and xfer biz to HU, CZ, BG
- Reduce space by 40k sqm globally – impact visible 2028
- Reduce PPE , redistribute machines, sell old ones

Next steps

- Some post Cost Saving Program measures in GreenTec (ODM, SW)

(FTE)	09/25	12/25	03/26	06/26	Trend
Defense	354	359	360	381	up
Transport	868	859	857	877	up
Software	732	729	715	725	up
Asia	158	142	144	142	stable
America	547	536	522	519	stable
Industrial	1,365	1,368	1,349	1,319	stable
ODM	928	893	879	904	stable
Comms	965	946	934	914	stable
GreenTec	912	866	827	615	Down +xfer
Total	**6,826**	**6,695**	**6,587**	**6,397**	**6,200**

440

Cost Saving Program 2026

Overview

Achieved

- 375 FTE reduced (6,696 → 6,397) + 76 leaving
- No more major layoffs planned
- 54 externals reduced
- 75% of savings visible Q4/26; 100% in 2028
- Restructuring + severance cost within plan EUR 25m

R&D Cost

- Reduce R&D cost from 12% to 10% of revenues
- Unique hourly rate of 43 EUR (current 49 EUR)
- Grow EE design centers in RO, BG, MK, SLO, MY
- No headcount reduction, but transfer GreenTec engineers to Software & Solutions
- Focus R&D capacities on Software & Solutions

Still Open

- Divest and leave buildings (Memmingen, Halle, …)
- Move site Mauerstetten to Memmingen
- Need to pay rent until 2028
- Settle VW claim

Update on Ennoconn

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Ennoconn completed a tender offer for Kontron in August

- In 2017, Ennoconn bought a 28% stake; now (10 yrs. later), the stake has increased to 48%
- Target stay < 50%
- Need to protect government (Transport) + Defense (Nato) customers
- Ennoconn is present to answer your questions
- No change in Kontron: Management stays, still an AT company, no risk for customers
- Increased involvement of H. Niederhauser (Technology) and C. Billeck (Finance) in Ennoconn

Why did Ennoconn go for a tender offer?

- Increase cooperation with Ennoconn/Foxconn
- 4 pillars identified to raise USD > 80m in synergies (shared 50:50 at arm's length)
  - Share technologies and products
  - Joint channels: Asia ENN/Fox; Europe Kontron; America: Combine → Use Kontron brand jointly
  - Supply chain: Overcome chip crisis + delinquent backlog → Reduce material costs
  - Global manufacturing: Act locally, increase efficiency

Important Partnerships

Overview

Foxconn:

- Lead investor in Ennoconn and Kontron
- Top 20 company globally, #1 in EMS
- Converts more and more to technology/ product company (robots, AI DC, eCars, semiconductor, …)

Intel:

- Biggest technology supplier to Kontron
- Tight cooperation in embedded technology with Ennoconn/Kontron

Mediatek:

- Financially connected to Foxconn and Ennoconn,
- Global #1 in ARM
- Supports Ennoconn/Kontron with ARM and 5G connectivity

Nvidia:

- Major investor in Mediatek
- AT technology for Foxconn robots
- Partner to Ennoconn/ Kontron

Cooperation & Synergies Ennoconn

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(in USD m)	Topic	Revenue Potential	Add profit for both	Add profit in 1 year	Add profit in 2 years
Technology	Install KontronOS on Ennoconn products (add unique CRA security features) Blue chip customers – NCR evaluates KontronOS/CRA family Ennoconn standard products (AI-boxes, rugged notebooks, IPC Motherboards, …)	$ 300m or 100k pcs 100k pcs @ $ 15	$ 6.4m	-	$ 6.4m
Technology	Kontron is technology leader for high-speed train infrastructure and flight servers for avionics. Products are not sold in volume in China and SEA. Local for local production at Ennoconn. Market size larger than in Europe; target: get 20% of EU volume	$ 60m	$ 12m	$ 3m	$ 9m
Technology	Add Kontron technology to Foxconn products in robotics, AI data center, e-mobility	Currently quantified	Currently quantified	-	Currently quantified
ODM	Kontron is among top #5 local ODM companies in Europe (electronic²). Offer Foxconn superior DMS together with Kontron R&D – results in the leading ODM in Europe	$ 200m	$ 10m	$ 8m	$ 10m
Sales	Kontron standard products sold in China/SEA via Ennoconn	$ 80m	$ 8m	$ 2m	$ 6m
Americas	Use Kontron brand for Ennoconn and Kontron in USA		$ 4m	$ 2m	$ 3m
Americas	Serve blue chip customers > $ 100m p.a., NCR model	$ 300m	$ 30m	$ 10m	$ 20m
SCM	Use Foxconn umbrella and supply chain „PSL“ partners, reduce delinquent backlog		$ 14m	$ 6m	$ 8m
Total	**Synergies split 50:50 between Ennoconn and Kontron**		**$ 84m**	**$ 31m**	**$ 62m**

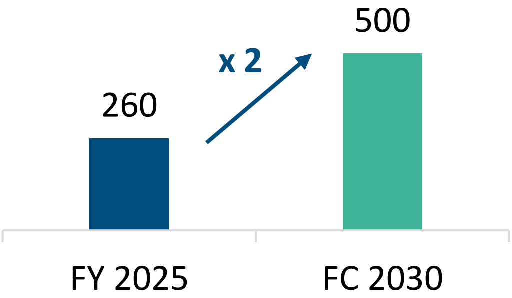
Our Game-Changer Technologies

From IoT Platform to Edge AI processing & physical AI and AI Grid

FY 2025 vs. FC 2030

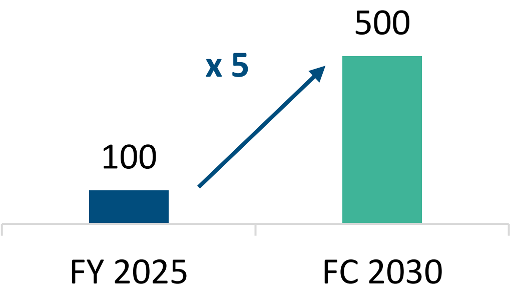
Transportation

EUR >500m



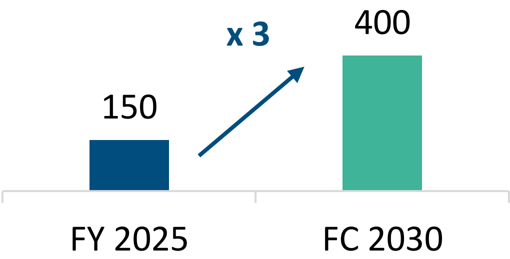
Software

80m field devices
SaaS model >500m EUR



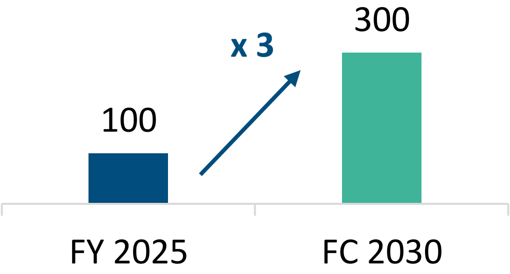
Defense & Physical AI

EUR >400m



5G NADs

EUR >300m



→ Accelerating innovation toward FC 2030 through focused R&D investment, scalable technology platforms, and stronger collaboration.

→ Position Kontron as the bridge between AI and the physical world.

→ **Reduce 12% engineering costs to below 10% of revenues, as of 1/3 for key technologies.**

Financial Strategy

Clemens Billek

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Cash Recovery Program

H2/2026

Measures:

#1
EUR 50m: Reduce inventory (delinquent backlog) to Dec 2025 level to approximately EUR 318m

#2
Payment terms optimized accross Kontron Group and reallocation of GreenTec resources → EUR 40m have been identified

#3
PPVs: Add 10% in material overhead (MOH)

Outcome:

Target
Operational cash flow of EUR >100m expected in H2 2026

Mid Term Forecast Revisited

Continuous Strong Organic Growth in Profitability Expected

(in EUR m)	Guidance 2026	Growth p.a.	Outlook 2030
Revenue	**1,600**	**~13%**	**2,600**
Software + Solutions	550	~16%	>1,000
M&A		5% of revenue base	300
Smart IoT	1,050	~6%	1,300
EBITDA	**225***	**~17%**	**420**
Software + Solutions	~19%	-	>22%
M&A	-	-	-
Smart IoT	~9%	-	>10%

* EBITDA adjusted by approximately EUR 25m of restructuring charges for the restructuring of the GreenTec division.

New Core Dividend Policy

Ennoconn asks for Dividends rather then Share Buybacks

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Progressive Growth:

- Kontron aims to increase the dividend per share in the coming years
  - For 2024 the dividend was EUR 0.60 per share
  - For 2025, no dividend was proposed – Share Buyback was executed
  - **For fiscal year 2026, the dividend proposal is expected to be at EUR 0.65 per share**
  - **For 2030 it is EUR 1.5 per share based on our Long Range Plan**

Funding Source:

- Dividend payouts are funded from Free Cash Flow

Cash Conversion Rate:

- Kontron measures its cash-generation capability using a target cash conversion rate. The cash conversion rate target is 75% of the EBITDA over a mid-term cycle.

Sales Strategy

Philipp Schulz

Sales Strategy

Unleash the Power of Kontron

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New Organizational Setup

- CSO as dedicated Function in the Board
- Regional Setup & Coordination (Asia/Europe/Americas)
- VPs for Cyber Solutions & Electronics[2]

Enabling Cross-Entity-Cooperation

- Training and Awareness
- Referral System

Growing the Partner Network

Current Focus Areas:

Defense & Aerospace

- Very strong bidding and DW activity (DW of 230M€ in the past 18 month)
- Shifting of resources into this vertical

Software & CRA

- Bundling
- Fast buildup of partners (HW)
- Enlarging Kontron Sales Capabilities (CRA)

Segment Structure 2026

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New setup: 8 Divisions in 2 Segments

Industrial

Telecom

North America

Asia

ODM

FC 2030
Rev 2,600m
EBITDA 420m

Cyber Solutions

Transportation

Aerospace & Defense

Technology Strategy

Martin Rausch

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Kontron Technology Keeps the World Moving

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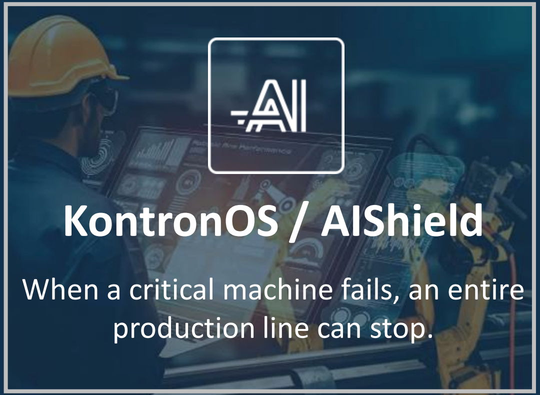
From railways and factories to defense and connected vehicles, our technology keeps mission-critical systems secure, connected and operational.

Transportation

Software



Defense & Physical AI

5G NADs

When these systems stop, the consequences are immediate.

Kontron helps keep the physical world connected, secure and operational.

Why Kontron Wins

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One-stop Partner Across the Complete Technology Stack

Hardware	Connectivity	Software	Services
Embedded computing & modules High-performance computing built for demanding applications	**5G / FRMCS & NAD** Reliable, high-speed connectivity for mission-critical mobility	**KontronOS & cybersecurity** Secure devices, data and operations across the lifecycle	**Engineering, integration & lifecycle** From development and integration to long-term support

The Difference

From individual components to complete mission-critical solutions

Our broad technology portfolio enables Kontron to address more of each customer’s needs - increasing our strategic relevance, creating cross-selling opportunities and driving more recurring software and service revenues.

HOW KONTRON IS OFTEN SEEN

Embedded Hardware / EMS Supplier

WHAT KONTRON ACTUALLY IS

Hardware + Software + Connectivity + Services Supplier

WHERE WE ARE GOING

The technology backbone powering the intelligent, connected and secure physical world

When connectivity, security and computing become mission-critical, Kontron becomes mission-critical.

The Integrated Technology Stack

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Integrated across the value chain - structurally differentiated and defensible.

From project-driven one-time HW sales business to recurring SW-driven business with ideally std. SW

UNIFIED AI INFRASTRUCTURE	Edge AI / Physical AI / AI Grid	Future
SERVICE	Maintenance, Updates, Security-Patches (Recurring Revenue)	Today
SOFTWARE (THE GLUE)	**KontronOS** (Proprietary IoT-OS) **KontronGrid** (Device Management) **KontronAIShield** (Cybersecurity)	Today
HARDWARE (THE BASE)	Secure embedded IoT Hardware Robust Edge Computing, High-Speed Rail Server	Today

Distributed and interconnected AI infrastructure that works as a unified intelligence platform

THE DIFFERENCE

- 3000+ engineers worldwide, around 45% of total workforce
- EUR 200m+ annual R&D investments

Reduce 12% engineering cost to below 10% of revenues, as of 1/3 for key technologies

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Platform Pillar I Transportation
Mission-Critical Infrastructure

Richard Neussl
EVP Transportation

Michael Jeske
EVP Transportation

Kontron Transportation Strategy

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Leading global supplier of end-to-end communication solutions for mission-critical networks

NEXT GENERATION OF BROADBAND SOLUTIONS

FRMCS - Capturing a multi-billion-euro market opportunity by leading the industry's transition through expertise and innovation.

- Offering a complete FRMCS portfolio covering the full value chain of mission-critical communications, including hardware, software and service solutions.
- Enabling railways a smooth transition to FRMCS with tailored step by-step migration plans and a log-term-support program, considering customers investment cycles.
- Capturing the first FRMCS tender opportunities across Europe through excellent technology know-how and customer's trust. First deployments expected in 2030 and early pilots starting 2026.
- Using the extensive FRMCS Know-how to enter pre-FRMCS markets such as India.

CURRENT GENERATION OF BROADBAND SOLUTION

A unique market position in the upgrading and maintenance of aging technology over the next 15 years

Enter emerging markets out of Europe with proven communication technology and trusted references.

FRMCS

Kontron´s Solution Portfolio

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Best Positioned to Capture the FRMCS Opportunity

CORE PRODUCTS

Mission-critical services
for voice, video, and data (MCx) for delivering FRMCS Services Before Network Rollout

5G RAN
together with innovations such as White Space helps operators optimize spectrum usage and enable radio

Interworking Functions
(IWF) ensures service transparency and continuity throughout the transition.

vDCR
A secure and scalable virtualization platform (**vDCR**)

RAILWAY SPECIFIC 5G DESIGN

White space coexistence

Railway-compliant radios

FRMCS-specific 900 MHz and 1900 MHz support

Specialized migration and inter-operability function

Kontron uniquely combines innovation, standardization and operational railway expertise to deliver a comprehensive and differentiated solution portfolio

vDCR MCx RAN FRMCS

The Railway Market

A multi-billion-euro market opportunity

By 2035, FRMCS is expected to be the primary railway communication standard across Europe, replacing GSM-R on approximately 150.000 installed GSM-R track kilometers across Europe.

Kontron is well positioned to benefit from this transition

DEEP RAIL EXPERTISE

Clear understanding of railway operational constraints, Railway-specific functionalities, Experience with major infrastructure managers and railway operators

FIRST MOVER IN FRMCS

Offering Kontron´s MCx as a first step for Railways toward FRMCS and prioritizing winning the first FRMCS trials to establish first-mover advantage.

CAPTURE THE FIRST INVESTMENT CYCLE

Focusing on the first FRMCS investment cycle in core markets.

LONG-TERM CUSTOMER PARTNERSHIP

Build Customer Loyalty by offering long-term support to safeguard railway communication networks beyond 2035 and provide operators with a reliable bridge to FRMCS.

FRMCS Estimated Market Totals to EUR 5.5bn

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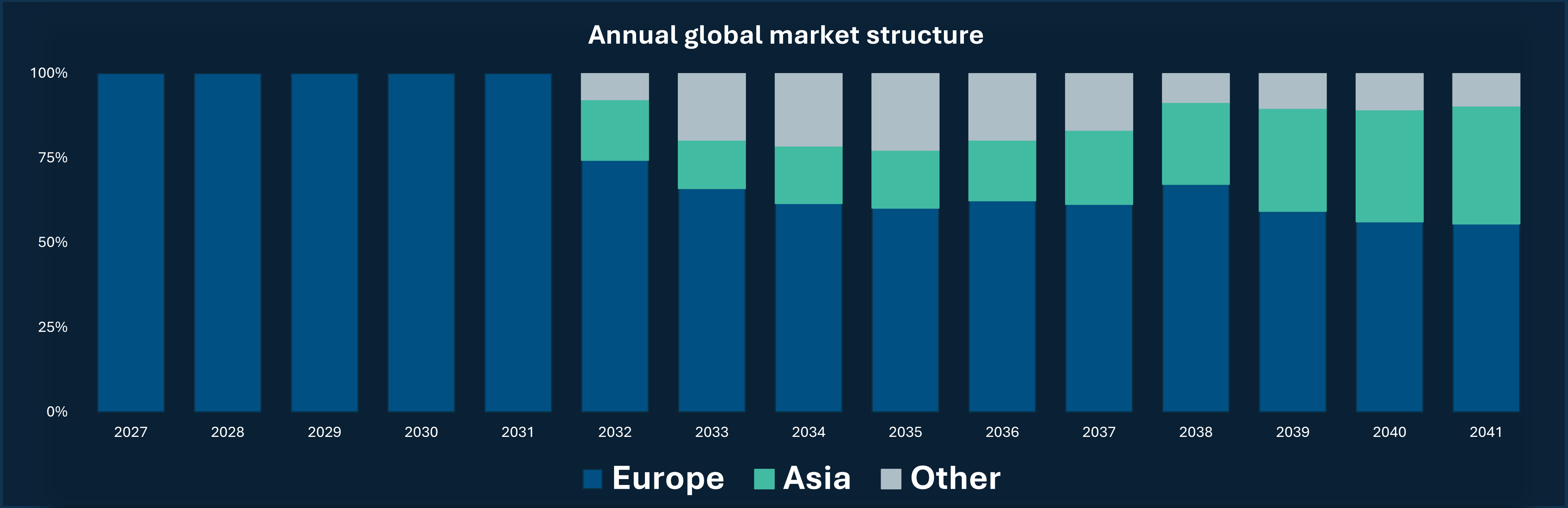
Estimated global market structure 2027–2041



GLOBAL FRMCS MARKET

€5.5bn

Estimated global cumulative revenue · 2027–2041

Kontron Leads the GSM-R Installed Base

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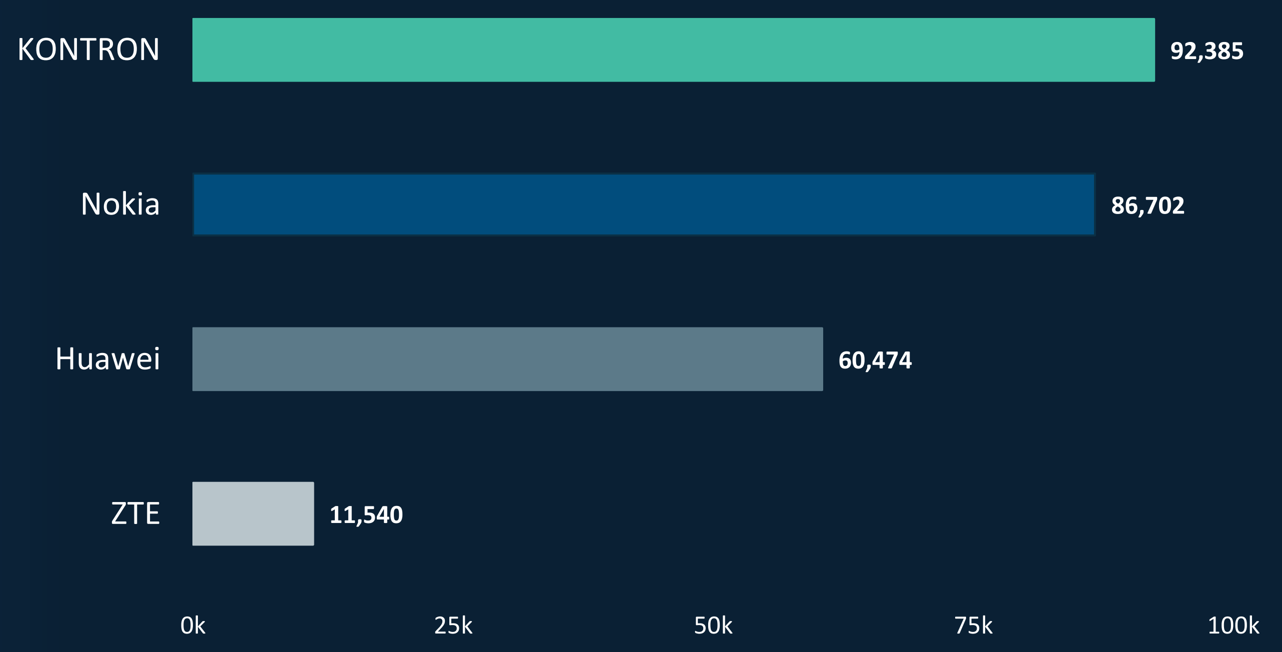
Installed base and core-network position

GSM-R equipped track by vendor (km)



EUROPE
74,606 km
Kontron installed track
≈48%
market share

WORLDWIDE
92,385 km
installed track — largest of listed vendors
≈36%
market share

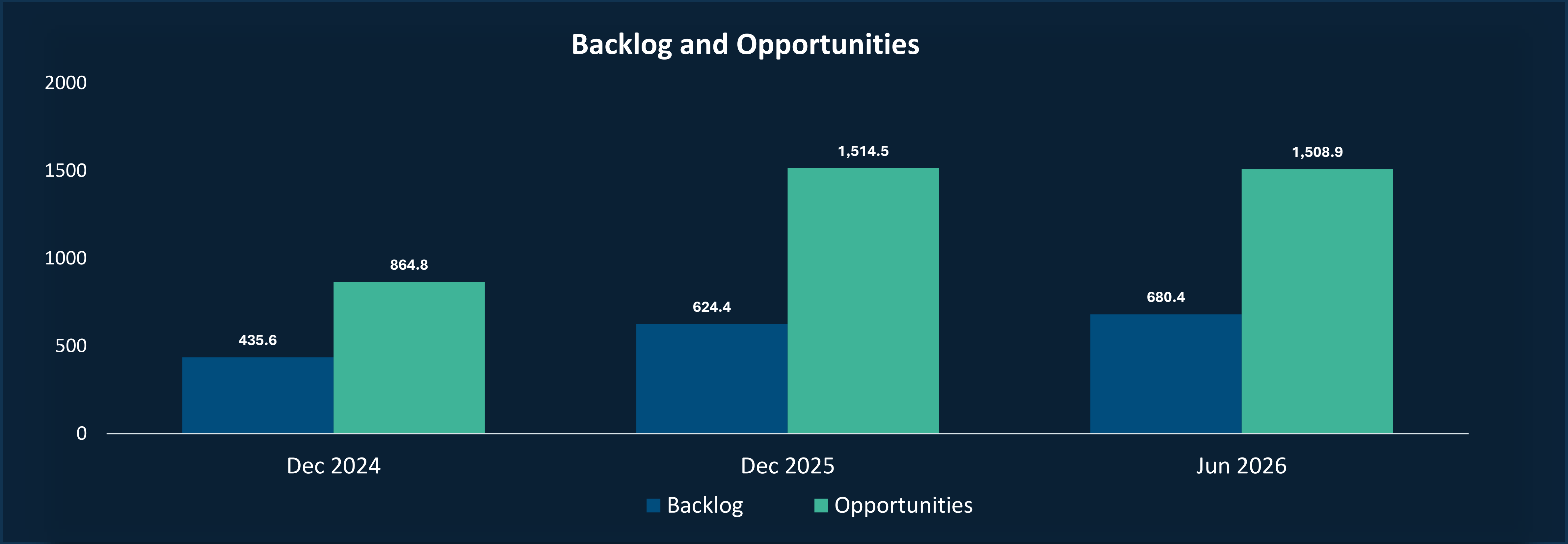
21
GSM-R core networks deployed
>50%
market share

TECHNOLOGY PROFESSIONALS | 2026
258 R&D **70** Engineering
Keeping Kontron at the forefront

Reference projects: SNCF GSM-R LTS · DB Gefo · SGP 4G · Countrywide GSM-R Egypt

Backlog and Opportunities

Transportation Division: Dec 2024, Dec 2025 and Jun 2026 in EUR m



Backlog +56.2% since Dec 2024

Continued growth versus Dec 2025 (+9.0%)

Opportunities +74.5% since Dec 2024

Broadly stable versus Dec 2025 (-0.4%)

Kontron Revenue Mirrors the Market Shift to FRMCS

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Relative revenue mix by product cluster | 2026–2033

TECHNOLOGY TRANSITION

FRMCS succeeds GSM-R as rail moves to 5G

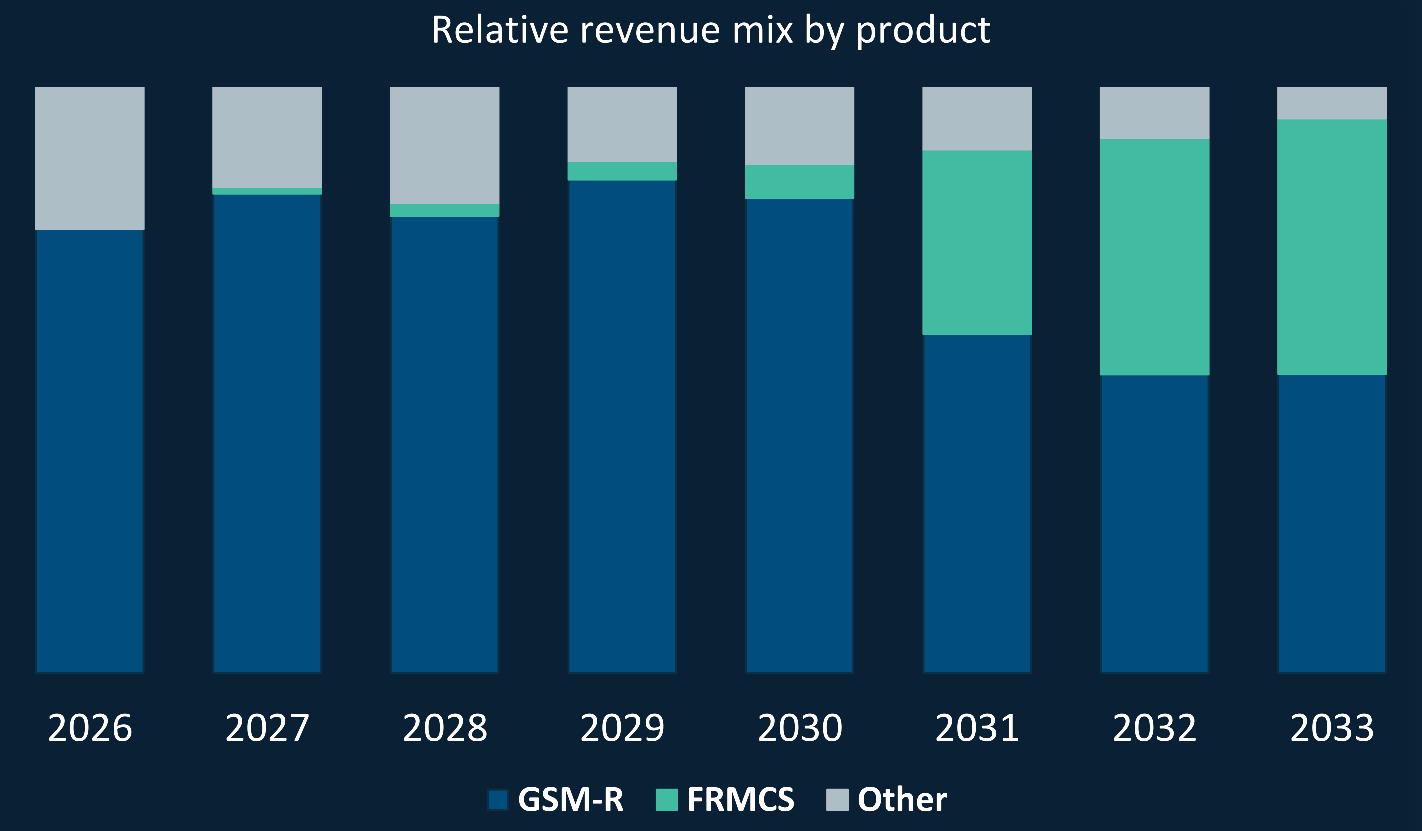
The market is shifting

FRMCS and GSM-R will coexist during migration as GSM-R approaches obsolescence around 2035.

Revenue mix shifts

GSM-R share declines after 2028 as FRMCS scales from 2031, approaching parity by 2033.

Sources: UIC FRMCS; UIC FRMCS-4; ERA (2024)



Reference Examples

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LONG TERM SUPPORT

AUSTRIAN FEDERAL RAILWAYS

Provide tailored maintenance solutions

Continued deployment of GSM-R and support of the operational railway until FRMCS is available

SNCF VOYAGEURS

The continued evolution of the mobile communication system to FRMCS, until approved for use on the customer networks and fully deployed

IARNRÓD ÉIREANN - IRISH RAIL

Deployment of GSM-R on the Iarnród Éireann- Irish Rail network and support of the operational railway until the replacement mobile communication system is available

FRMCS TRIALS

DEUTSCHE BAHN / SNCF VOYAGEURS

Validation of key FRMCS technologies, GSM-R/5G coexistence through White Space and resilient hybrid connectivity using multipath across private FRMCS and public mobile networks

DIGITAL RAIL FOR GERMANY

Research collaboration with Digitale Schiene Deutschland on "Design and Evaluation of a FRMCS End2End System for Future Rail Operation"

FP2-MORANE-2

Validation and functional testing of key railway use cases in the lab and field environments to verify that future FRMCS standards meet operational railway requirements and can be successfully implemented in real-world environments

Platform Pillar I Transportation Q&A

Platform Pillar II
Software
KontronOS
KontronAIShield

Bernhard Günthner
EVP Cyber Solutions

Michael Jacob
VP Cyber Solutions

The Global IoT Market: Size & Growth Trajectory

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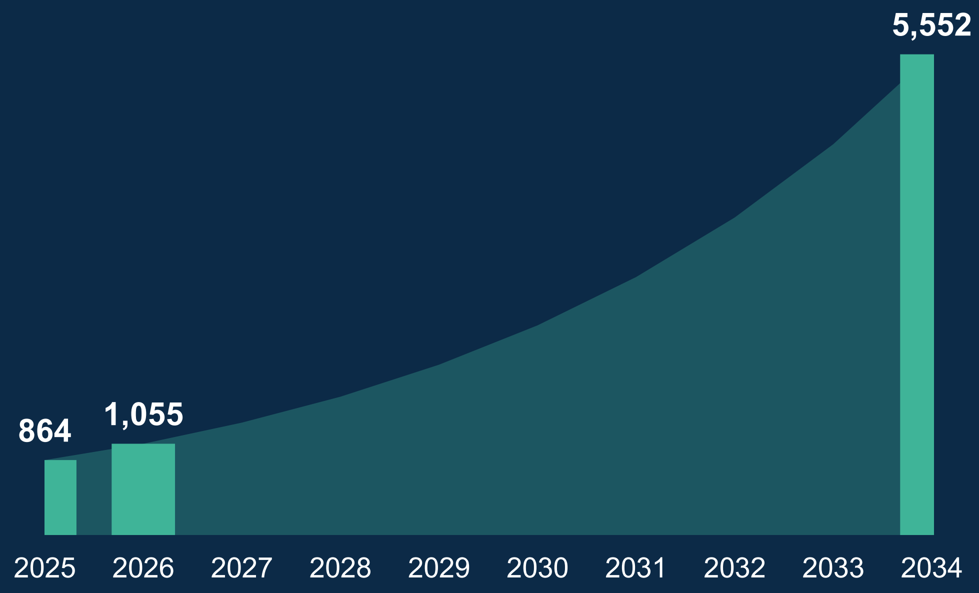
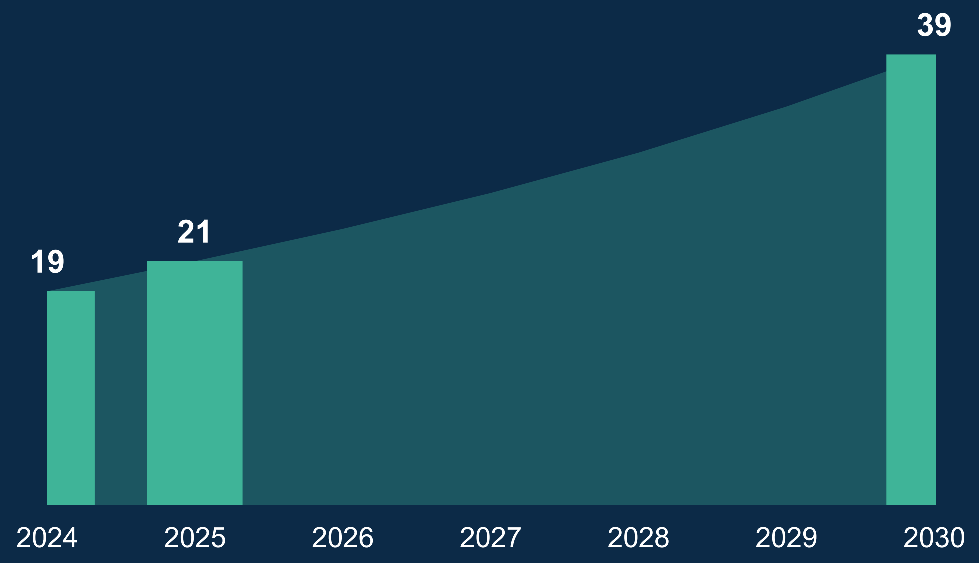
Total addressable market and installed base, 2024–2034

GLOBAL IoT MARKET — TAM (USD BILLION)



23.1% CAGR (2026–2034) · Source: Fortune Business Insights, Sept 2026

CONNECTED IoT DEVICES (BILLIONS)



13.2% CAGR (2025–2030) · Source: IoT Analytics, Oct 2025

→ forecast to exceed 50 billion devices by 2035

Interpolated years between each source's reported data points, plotted at the stated CAGR — shown as trend only (unlabeled); solid columns mark the figures actually published by the source.

OVERALL TARGETTING

Core Value of Kontron Solution offering

- “We provide a CRA-ready, secure IoT ecosystem that reduces risk, cost, complexity and time-to-market.”

Business goals 2030

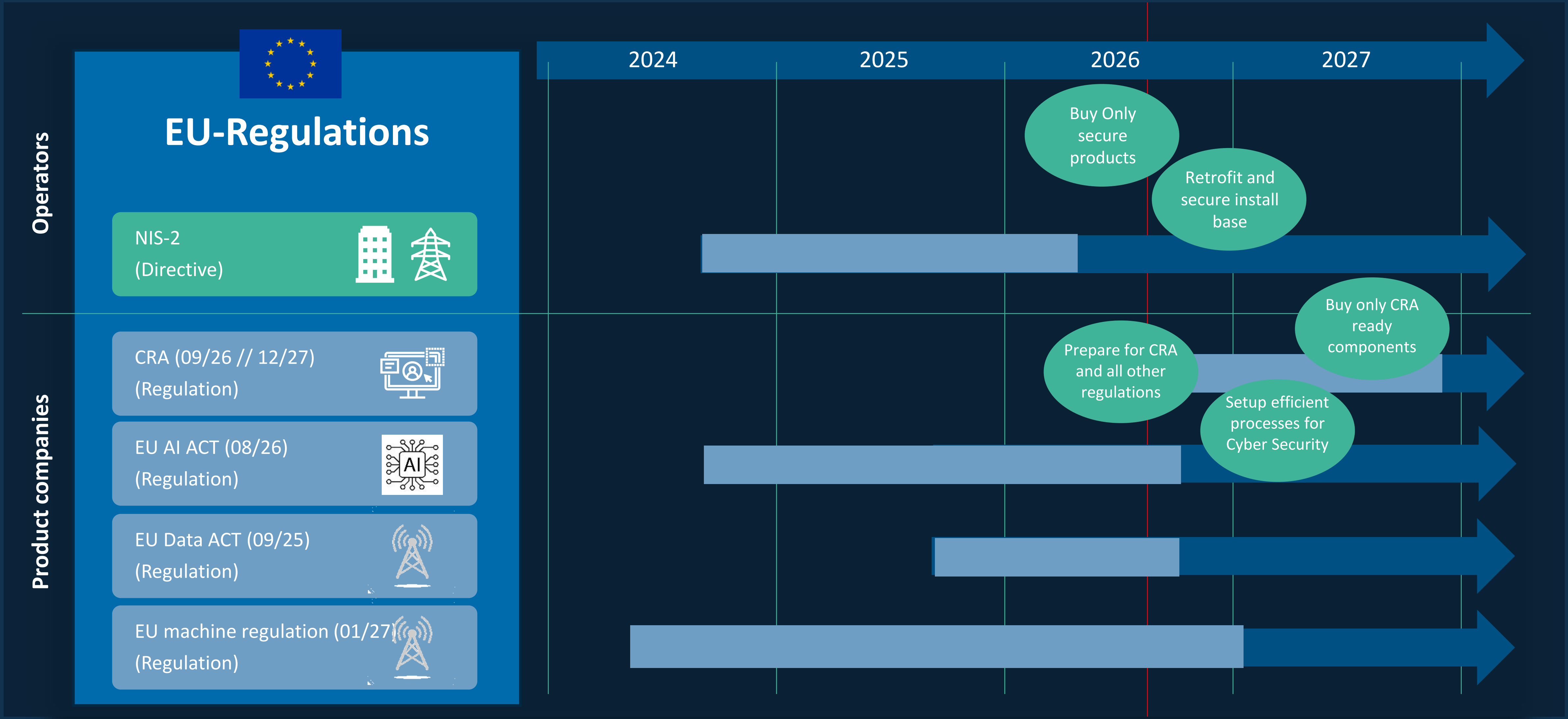
- 500 million of Kontron revenues is Software and related services (incl. Hardware)
- Profitability is beyond 15% (EBITHQ)

Group Statement

- Leverage the full power of Kontron while combining portfolios and think in solutions
- Next level Thinking: from devices to Platform Approach

Legal framework today (and tomorrow)

Important Frameworks



Regulations apply to all EU countries <-> Directives require a national law in each EU country

The next Level: Platform Thinking

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Yesterday

Proven hardware: Kontron KBox

Today

KontronGrid

KontronOS

CRA-compliant software: KontronGrid & KontronOS

Tomorrow

A certified IoT Bundle: **Hardware. Software. Compliance. One Solution.**

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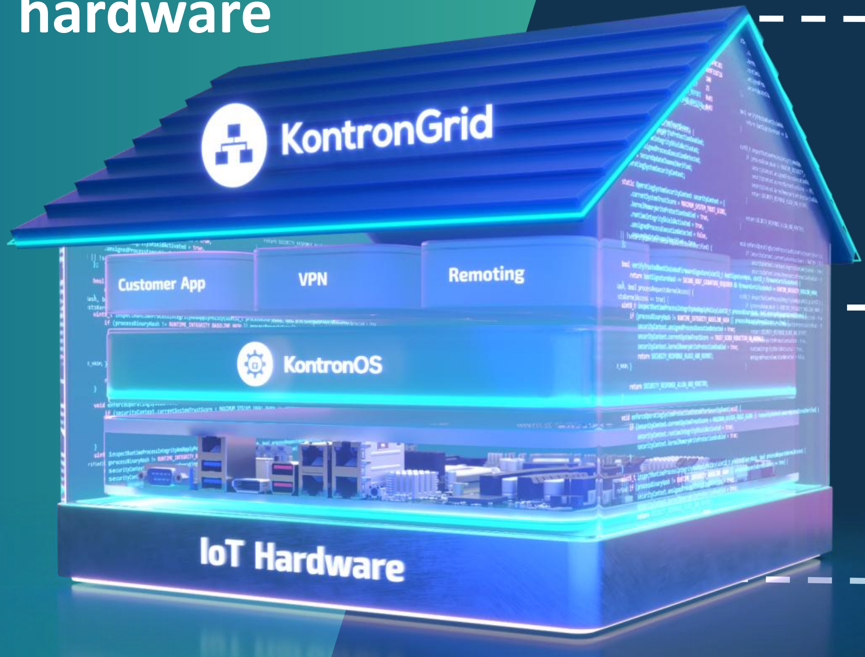
Kontron IoT Bundles

ManagedEdge IoT Bundle: Comprehensive IoT device management, secure operating system and proven hardware under one roof

› Ready-to-Use
› Scale quickly
› Low upfront costs
› Roll out automatically



READY FOR NIS 2 REQUIEMENTS
READY
CRA / NIS2
READY
READY FOR NIS 2 REQUIEMENTS

KontronGrid
Comprehensive IoT device management as a central control element for the seamless management of the global IoT infrastructure

KontronOS
Secure operating system optimized for Kontron hardware provides protection for IoT devices and applications

Kontron Hardware
Proven IoT hardware as solid foundation for a comprehensive IoT infrastructure

Secure. Connected. CRA-Ready.

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"Windows for industry"

- One industrial OS for all machines and devices

Security by design

- Meeting cybersecurity requirements through entire lifecycle

Future-proof

- CRA-ready for new features, standards, and security requirements

Kontron AIShield

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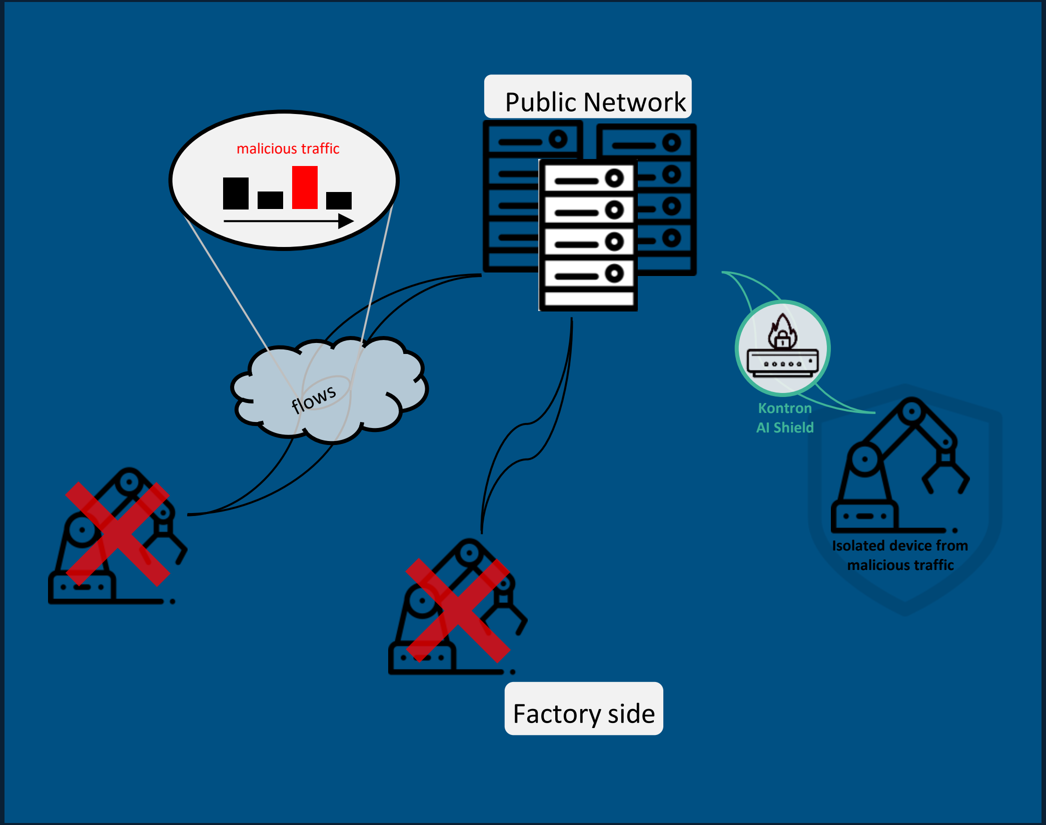
Physical Edge AI Protection Against Cyber Threats – in Coop with exein

- Network-connected devices are increasingly vulnerable to **malicious traffic** and **cybersecurity threats**
- KontronAIShield is an innovative edge-AI protection solution designed for the industry
- **Monitoring** and **identifying** anomalies, the AI Shield can easily **isolate machines** from threats
- With KontronAIShield factories can ensure their connected assets remain **secure**, **reliable**, and **resilient**



Standardized Customer Journey

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The Power of IoT

Stage 01 Identify:

- Pitch Call
- CRA Strategy Call
- CRA Readiness Scoring Call

Stage 02 Assess:

- CRA Gap Workshop
- IoT Bundle PoCs & Pilots
- CRA Sparring (Consulting)

Stage 03 Solve:

IoT Core Products

- Managed IoT Bundle
- KontronOS
- Kontron ToolSuite
- Connect IoT Bundle
- FabEagle® Connect
- Equipment Cloud®
- Kontron AIShield
- Kontron Grid
- Hardware

Consulting

- Product Certification Consulting
- Supply Chain Management
- Secure Development Process
- Security Testing
- Legal Advisory & Contracts
- Threat Modelling

Customized Services

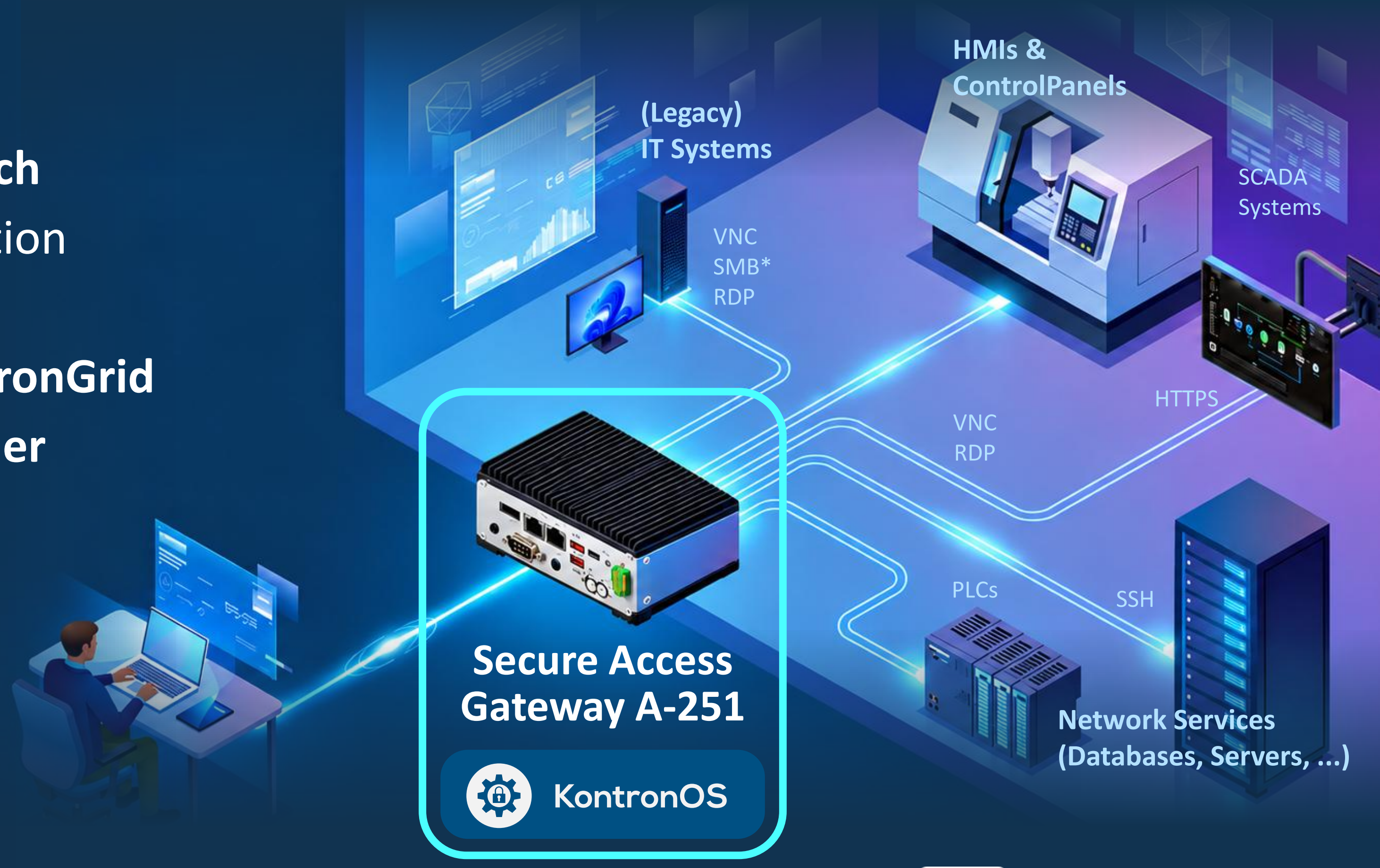
- Application SW Develop.
- Embedded SW Develop.

Success Story:
TeamViewer Agentless Access powered by KontronOS

kontron
The Power of IoT

- Based on the proven **Kontron IoT Bundle**
- **Only 3 months from concept to market launch**
- Rapid integration of the TeamViewer application
- Fast and scalable customer rollout
- Headless system remotely managed via **KontronGrid**
- Prooves the strength of the **KontronOS partner ecosystem**

Strategic Impact:
Accelerating software partnerships, reducing time-to-market, and unlocking new growth opportunities beyond traditional hardware.



TeamViewer

Summary

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- Solution approach market proven
- Further Roll Out of standardized customer journey to use full Kontron sales force

- Cluster the existing customer base
- Product readiness and bundle readiness - also with support infrastructure, certifications etc.
- Common offering and terms & conditions (one legal framework)

- Market needs the ready to go bundle right now => CRA
- Further investments into AI-driven bundles and ready to go solutions (Robotics, Vision etc.)

- Extension of CRA related marketing
- We can scale with strategic partners (Ennoconn…), distributors etc.

Platform Pillar II Software Q&A

Coffee Break

10 Minutes

kontron

The Power of IoT

Platform Pillar III Defense & Physical AI

Philipp Schulz
CSO

John Healy
VP, Client Computing Group, Industrial and Robotics
Intel Corp

kontron
The Power of IoT

Defense

Philipp Schulz, CSO

September 2026

The New Defense Market

Rapid Change

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- Procurement changed from years to weeks
- Growing Neo Primes emerging in UAV, cyber, AI & sensor-fusion
- Tech-driven platforms requiring compute integration
- High demand for COTS
  - Speed
  - Secure Supply Chains
- Lower entry barriers for suppliers
- High demand for local manufacturing & local R&D

EU Defense Procurement with EU suppliers

2022		2027
22%	→	**40%**

Kontron strengths: Focus on COTS with Quick Start integration capabilities

Total Addressable Market (TAM)

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Embedded Systems Defense – North America & Europe

North America
€691M
TOTAL TAM

Europe
€470M
TOTAL TAM

€1.9B
Global TAM 2026

+8.6%

€3.1B
Global TAM 2034

Country / Region	Kontron's Main Target Customers
U.S.A.	GENERAL ATOMICS, LOCKHEED MARTIN, GD, CACI EVER VIGILANT, NORTHROP GRUMMAN, L3HARRIS FAST. FORWARD., Raytheon An RTX Business, BOEING, leidos
Canada	GD, SAFRAN, LOCKHEED MARTIN, LEONARDO
U.K.	LEONARDO, AIRBUS, QINETIQ, THALES
Germany	RHEINMETALL, HENSOLDT Detect and Protect., DIEHL Defence, TKMS, AIRBUS
France	THALES, AIRBUS, MBDA MISSILE SYSTEMS, NAVAL GROUP, KNDS
Italy	LEONARDO
Spain	INDRA
Nordics (Sweden, Norway, Denmark, Finland)	SAAB, KONGSBERG

Frictionless Global Scalability

…with local production capability

- COTS-based architecture facilitates local sourcing, reducing supply-chain and export-control dependencies
- Board manufacturer to integrated box build supplier
- Founding member of standards such as SOSA
- Sovereignty → Increased demand for local production
- Kontron leverage our 20+ production sites across Europe and North America
- Scalability for global customers with global production and R&D
- Sell to Tier 1 & 2 – avoid complex direct government contracts

Kontron rarely sells to end customer (Navy/ Air Force/ Army/ Marine Core)

Tier 1 – Builders of complex military platforms sold to governments
Tier 2 – Builders of major subsystems that are sold to Tier 1

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Positioned to win in high-growth Defense applications

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Backed by a common set of mission-critical capabilities

Autonomous Systems

13.8 %

CAGR 2026-2035

Counter-UxS

26.5%

CAGR 2026-2031

Sensor Fusion

7.3%

CAGR 2026-2030

Command & Control

7%

CAGR 2025-2033

Common capabilities across growth applications

Mission Computing

- Rugged mission computers
- Real-time processing
- Systems integration

Edge AI & Sensor Processing

- AI inference
- Sensor fusion
- Video analytics

Secure Connectivity

- Tactical 5G
- SATCOM
- Secure networking

Open & Modular Architectures

- VPX / SOSA standards
- Interoperability
- Upgradeability

Trusted Platforms

- Cybersecurity
- Long lifecycle
- Sovereignty / Secure supply

Boosting our Defense Business

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Grow to 400M€ by 2030
Maintaining high profitability

- Combine building blocks – maintain stand alone products
- Standards participation and leadership
- Roadmap products are plug and play building blocks
- Increase number of standard products - avoid export restrictions
- Target Customers: NATO Primes & Neo Primes
- Increase cross vertical applications

Growth based on NRE & development cost, not CAPEX

VNX+ Rugged AI Defense Computer

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A compact, scalable rugged computing platform for drones and robotic systems, delivering AI at the edge

Based configuration

- VNX+ rugged enclosure VNX+ PSU module
- VNX+ CPU board based on Panther Lake or Nova Lake

AI and Real-time focus

- Deterministic computing with TCC & TSN
- Optimized AI performance with GPU and power-efficient NPU

Customer value

- Lower integration risk with pre-qualified defense computer
- Future-ready rugged edge node with VNX+ modularity

Notices and Disclaimer

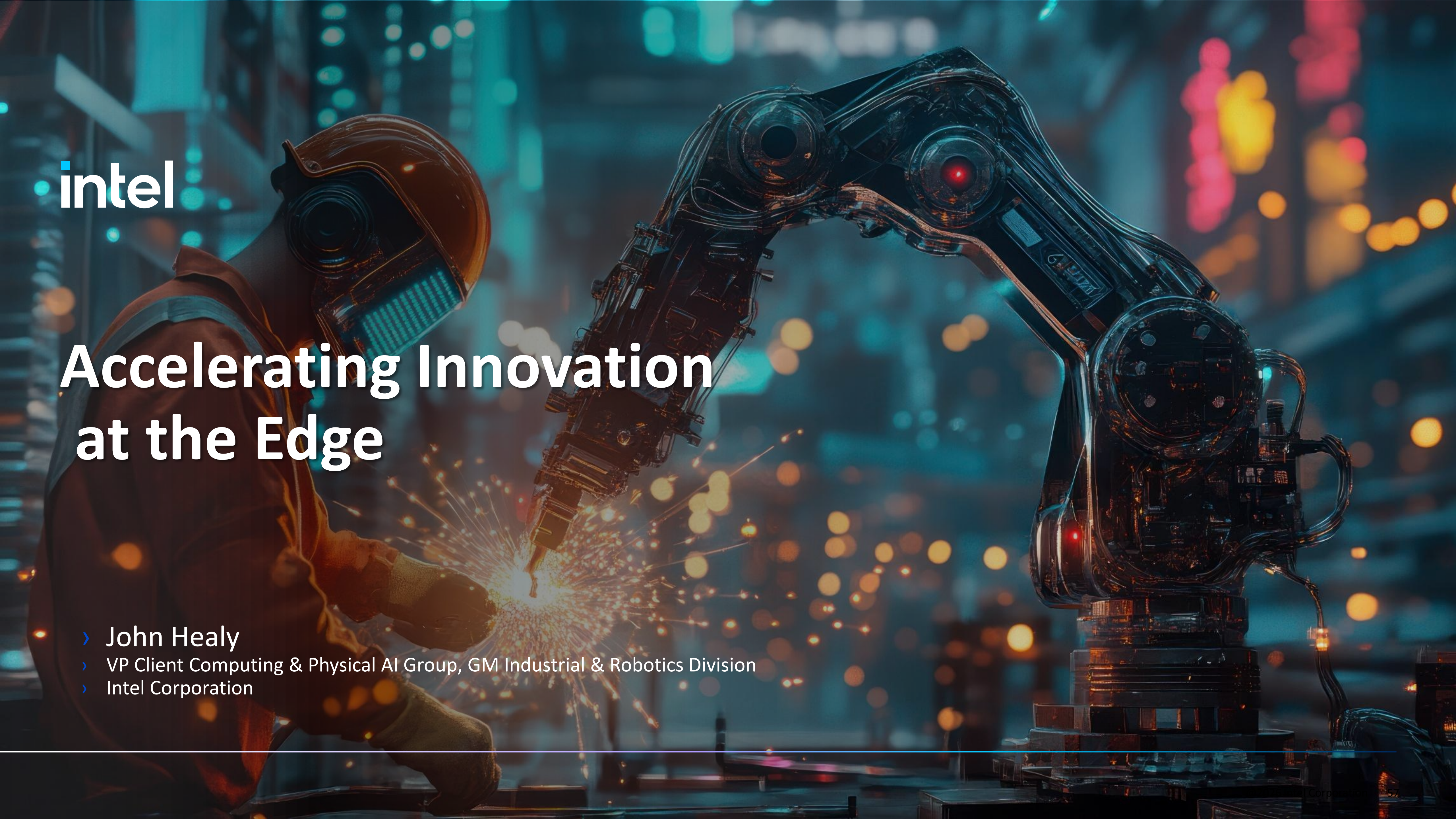
"Designed for All Day Battery Life" refers to laptops powered by Intel® Core™ Series 3 processors with minimum battery size and power efficient designs that leverage Intel's latest architecture, advanced compute technology and power optimizations that combine to deliver extended battery life while performing office multitasking, video playback, web browsing, and standby time in a typical consumer PC usage scenario and realistic environment. Individual system results will vary significantly with different usages, battery capacity and other OEM design factors. See intel.com/performanceindex for details.

Intel technologies may require enabled hardware, software or service activation.

Intel does not control or audit third-party data. You should consult other sources to evaluate accuracy.

Statements in this presentation that refer to future plans or expectations are forward-looking statements. These statements are based on current expectations and involve many risks and uncertainties that could cause actual results to differ materially from those expressed or implied in such statements. For more information on the factors that could cause actual results to differ materially, see our most recent earnings release and SEC filings at www.intc.com.

AI features may require software purchase, subscription or enablement by a software or platform provider, or may have specific configuration or compatibility requirements.

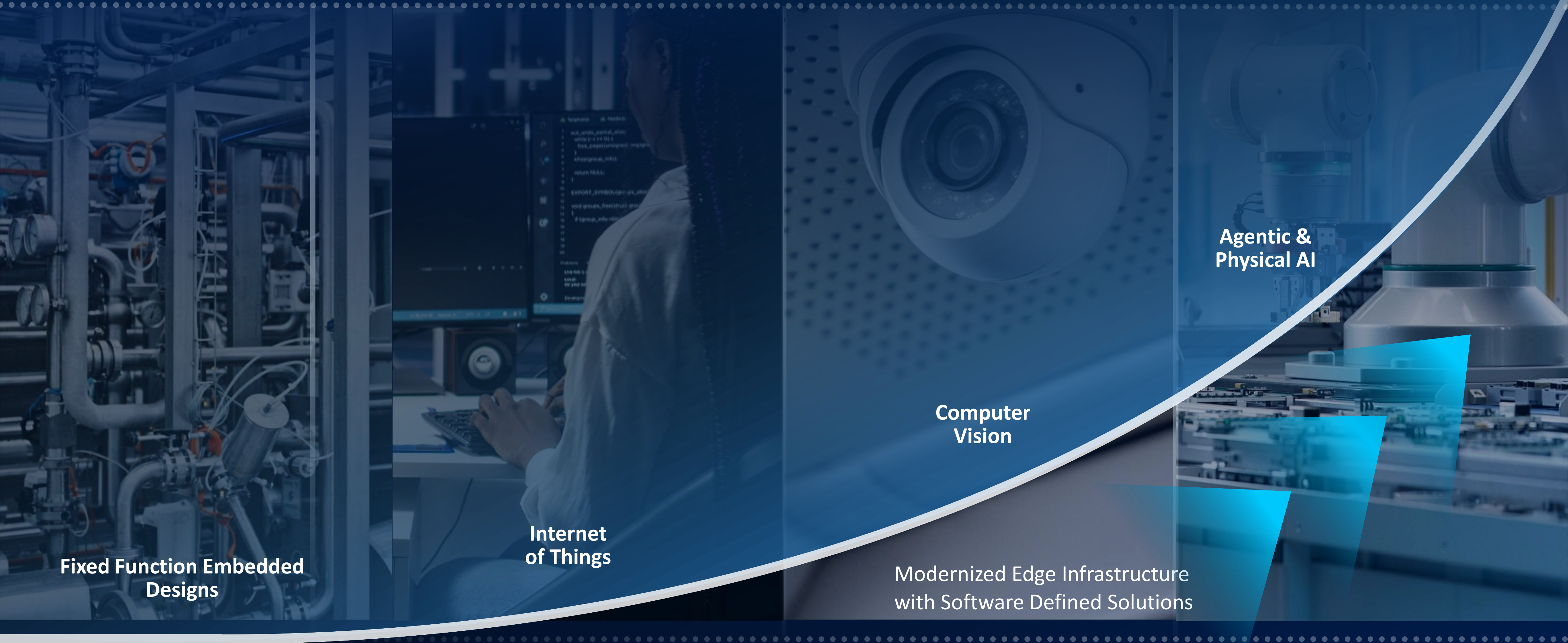


intel

Accelerating Innovation at the Edge

- John Healy
- VP Client Computing & Physical AI Group, GM Industrial & Robotics Division
- Intel Corporation

Edge Transformations



40+ Year Journey

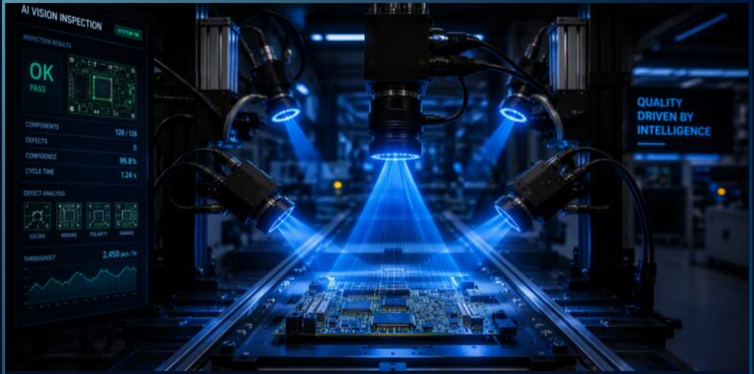
intel

Intel x Kontron: Edge AI in Action

Optimized edge platforms that turn AI and automation into measurable operational value.

Complete Solution for Vehicle Assembly

Process data processing and visualization in fully automated production cells



Advanced AI-based Visual Inspection

Improving quality assurance in highly customized manufacturing environments

Digital Transformation in Healthcare

Powerful and reliable rackmount server solution for AI in healthcare

Innovate with an Open Ecosystem

Open hardware. Optimized Software. Ecosystem choice.

intel robotics

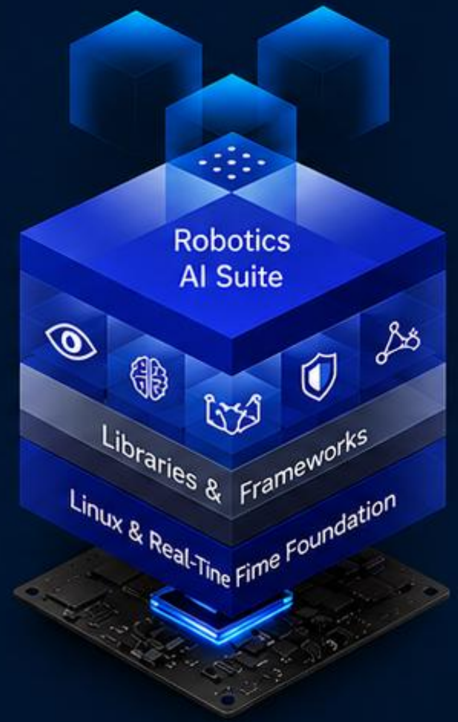
Robotics Reference Platform

Unified Compute
CPU • GPU • NPU • IPU
One platform for vision, AI & control

Robotics-Ready I/O
EtherCAT • CAN • GMSL • MIPI
Built for real-time connectivity

Modular Design
Compute and I/O carrier cards for easy customization

Robotics AI Suite



AI + Perception
OpenVINO™ • PyTorch • Physical AI
Accelerated inference and perception pipelines

Real-Time + Safety
TCC • Preempt-RT • Functional Safety
Deterministic control with built-in safety foundations

Open + Extensible
ROS 2 • Reference Blueprints • Robotics I/O
Open standards and reference architectures for faster innovation

Build on validated foundations. Differentiate above the stack.

Integrated AI Acceleration Highlights

- CPU AI — Processor-based AI acceleration
- GPU AI — Integrated GPU AI acceleration
- NPU AI — Integrated NPU, Intel AI Boost

Intel's Edge Portfolio
Choice and Flexibility for Edge Solutions

		intel ai
Scalable Performance	intel XEON	CPU AI
Scalable AI, Graphics, and Media	intel ARC GRAPHICS; intel CORE ULTRA	CPU AI, GPU AI, NPU AI
Efficiency Optimized AI	intel CORE ULTRA	CPU AI, GPU AI, NPU AI
Mainstream	intel CORE ULTRA; intel CORE; intel processor	CPU AI, GPU AI, NPU AI
Entry	intel CORE; intel processor; intel ATOM	CPU AI, GPU AI, NPU AI

Top to bottom scalability

CPUs with integrated acceleration

Broad, open software ecosystem

Intel and Kontron Roadmap for integrated and accelerated AI

2025

K4031-H|K4021-U
Kontron's SMARTCASE™

Intel® Core™ Ultra processor Series 1
Codename Meteor Lake

Up to 34TOPS

2026

Intel® Core™ processor Series 3
Codename Wildcat Lake

2,5"-SBC-WCL
KBox A-251-WCL

Up to 40TOPS

Intel® Core™ Ultra processor Series 3
Codename Panther Lake

3,5"-SBC-PTL
KBox A-151-PTL
VX30101

Up to 180TOPS

2027

Next Generation Intel Processors
Codename Nova Lake

- ✓ Chip down & socketed
- ✓ Seamless scalability
- ✓ Robust I/O
- ✓ Long-term availability
- ✓ Embedded features

Next Gen Kontron Products

Breakthrough
AI performance

Coming soon*:
KBox A-151-PTL-ROBO

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The Power of IoT

Addressing High-Growth Markets in AI, robotics, automation and critical infrastructure

- Extremely Powerful AI-Ready Edge Platform extending the proven KBox 151 series
- Native AI & Robotics Interfaces for rapid deployment
- Scalable AI Roadmap from premium (Core) to cost-efficient platforms (Atom)
- Built-In Cybersecurity with Secure BIOS, KontronOS and KontronToolSuite
- Designed & Manufactured in Europe with global certification and design-in support

Thank You

intel®

Platform Pillar III Defense & Physical AI Q&A

Platform Pillar IV
5G NADs

Christoph Caselitz
EVP Automotive & Mobile Solutions

5G Solutions for every Business

Require different cellular modems

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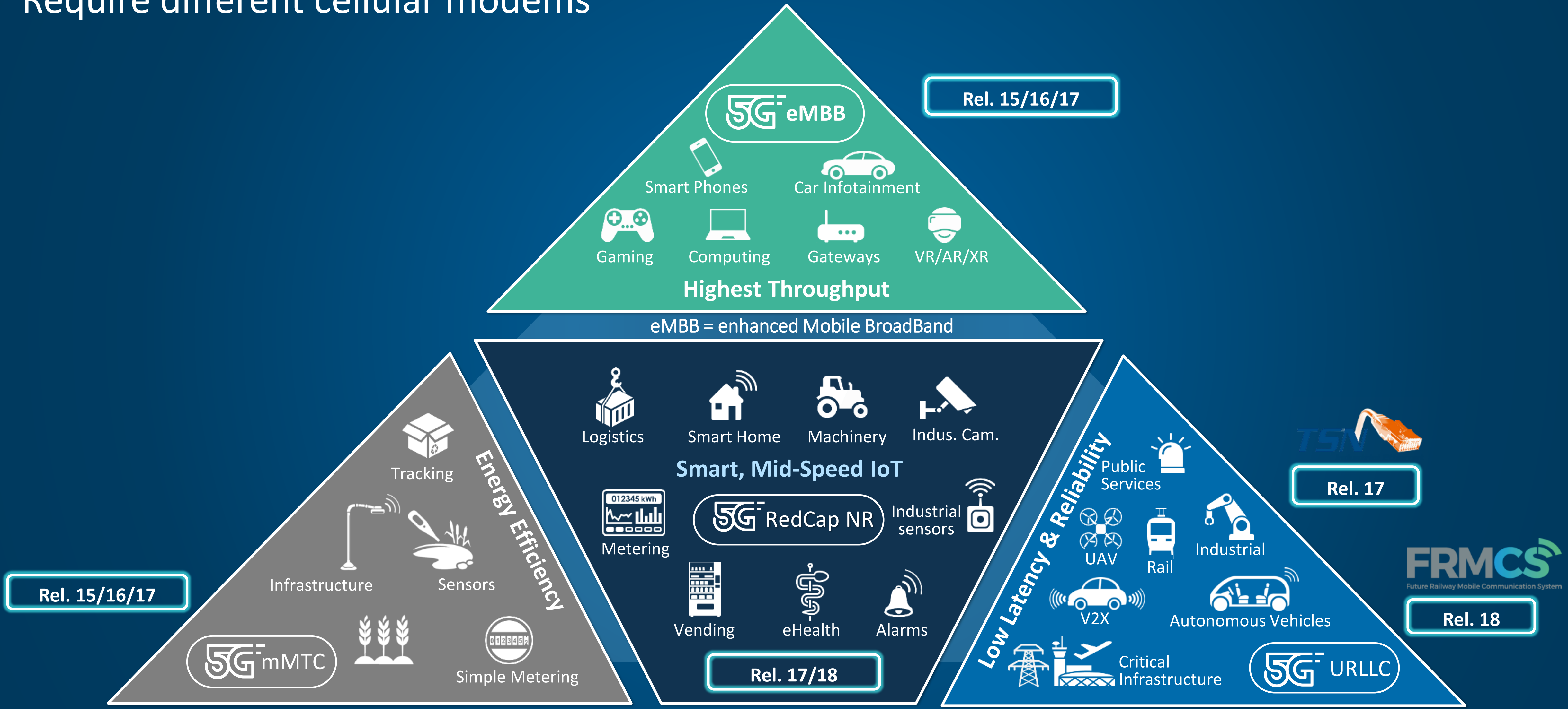

mMTC = massive Machine-Type Communications

RedCap NR = Reduced Capabilities NR

URLLC = Ultra Reliable and Low Latency Communications

Designing 6G

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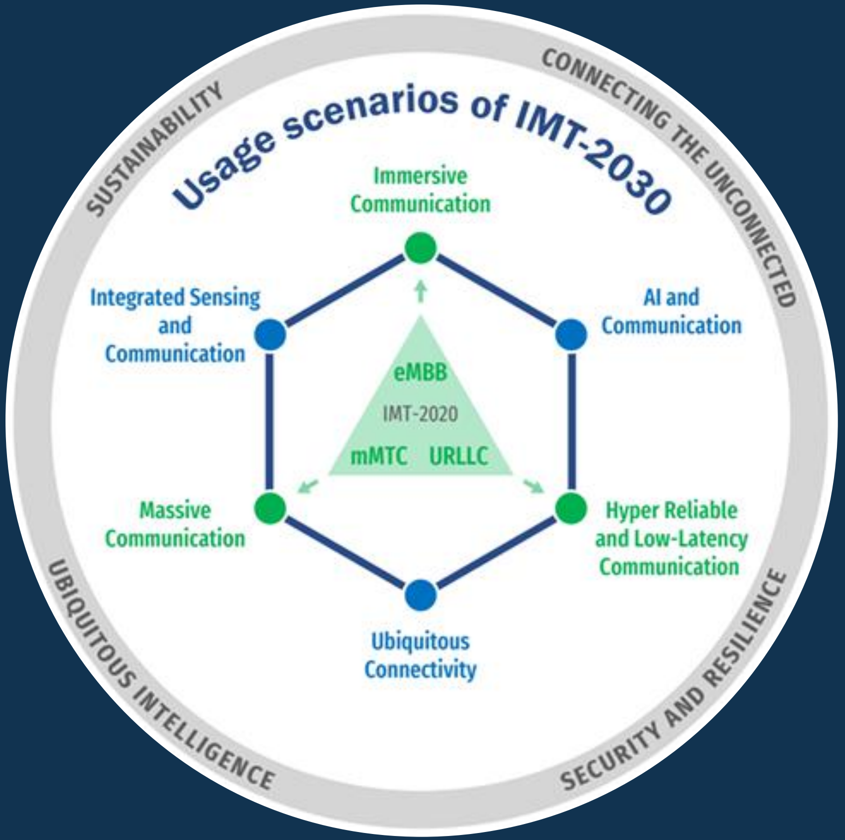
Enabling scalable mobile connectivity for our AI-driven future



Evolution of mobile connectivity	6G will complete AI applications to scale new mobile experiences across multiple platforms
Coverage and capacity	6G will extend the coverage and capacity of existing spectrum bands and unlock new upper mid-bands for higher capacity
Services beyond connectivity	6G will enable context-aware AI services, power digital twins that fuse RF and sensor data, and automate operations such as energy savings
Network security	Quantum-safe cryptography and zero trust architecture extend protection across layers, add forward and backward mobility security, and strengthen user privacy

Sources:
Recommendation ITU-R M.2160-0 (11/2023) - Framework and overall objectives of the future developmen...

Program Lifecycle

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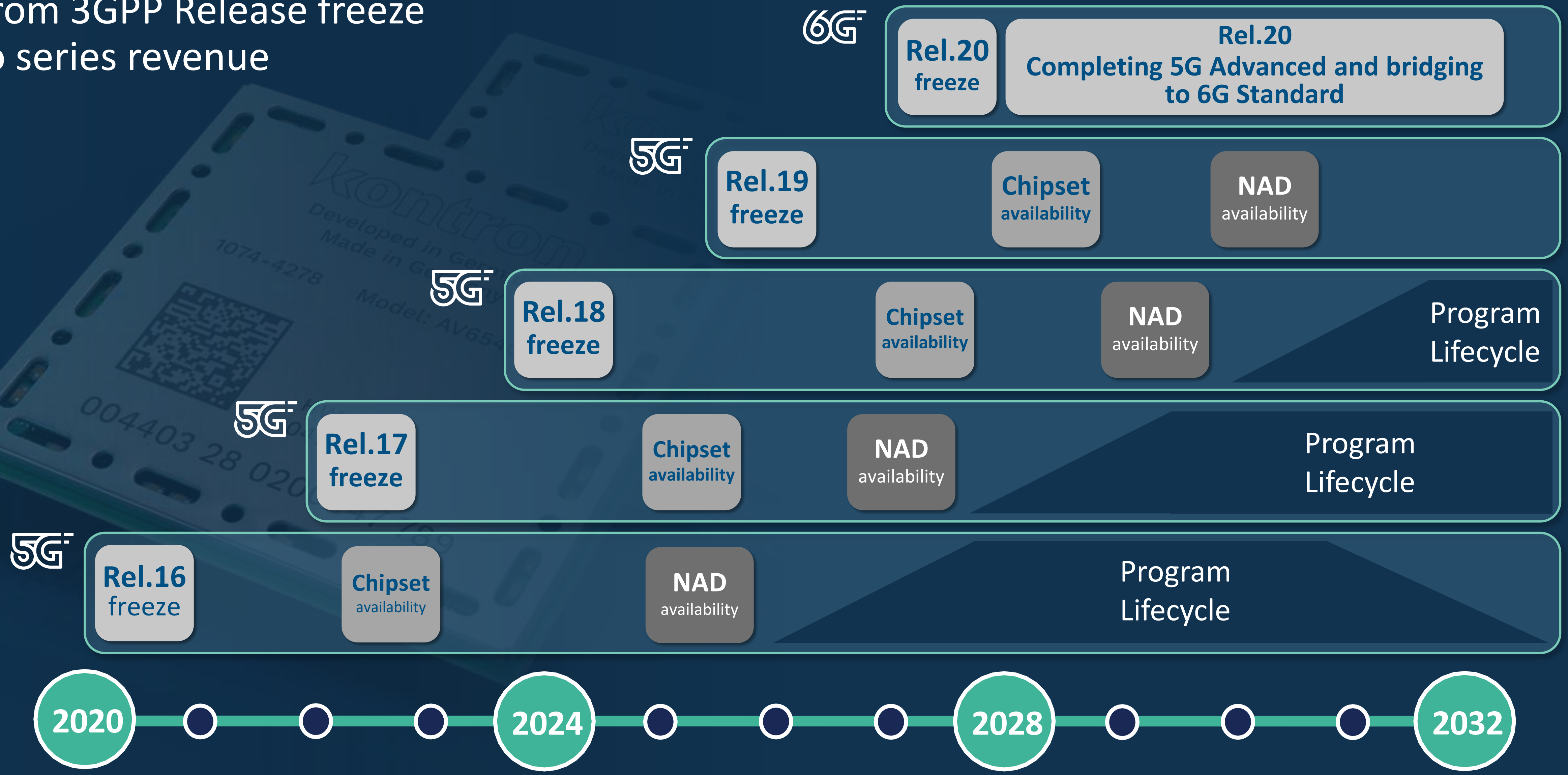
From 3GPP Release freeze
to series revenue



Trusted 5G Mobile Solutions

For Automotive & Industrial

Connected Car
- NB/NR-NTN
- Infotainment

Trucks and Fleets
- NB/NR-NTN
- Fleet Management

Industry 4.0 Mobile
- MPN
- Robotics

Transportations
- FRMCS
- Trackside

Agriculture, Heavy Machinery
- NB/NR-NTN
- Fleet Management

IoT Mobile Edge Devices

Kontron, the only real Western Player

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HW and SW are completely out of Europe – unique position on the market

Made in Germany

Designed & Manufactured in Europe

Developed in Europe

100%
R&D Headcount

2
Research center

10
Chipset platforms

14
Product Families

140
Product Variants

Manufactured in Germany

130
Employees

6
SMT Lines

~1 Mrd
Components per year

~50
Product Families

180
Product Variants

Portfolio Strategy

Short Term / Mid Term / Long Term

Cyber Resilience Act

5G

3GPP Rel.16/17
5G NR MBB

2026

3GPP Rel.17
FRMCS
Morane 2

5G

3GPP Rel.17
5G RedCap

2028

3GPP Rel.18
FRMCS
Commercial Roll Out

5G

3GPP Rel18/19
5G

2030

6G

3GPP Rel20
Bridging 5G to 6G

2032

AI usage

Developed in Europe, Manufactured in Europe

Market Potential

Short Term / Mid Term / Long Term

AUTOMOTIVE

Global 5G automotive module shipments could grow from approximately 14 million units in 2026 to nearly 100 million units annually by 2035

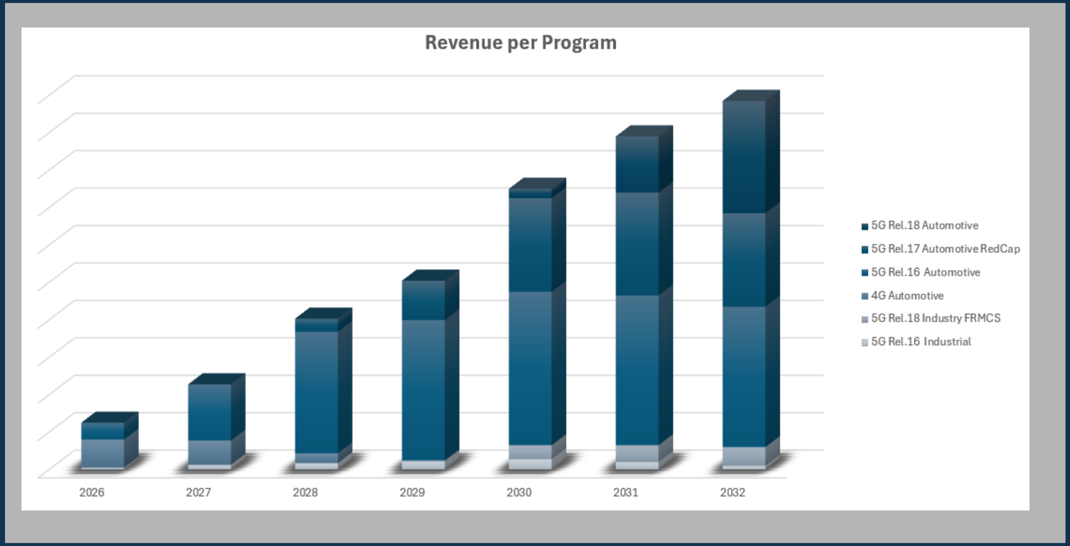
Cellular connectivity penetration rises from ~75–80% (2024–25) to ~90%+ by 2028

Industry IoT Railway FRMCS

Global shipments are expected to increase by more than 13x between 2026 and 2035, reaching over 700 million units annually.

Estimation that cumulative 5G shipments (excluding 5G RedCap) will reach 2.5 billion units, growing at a CAGR of 60% between 2022 and 2030.

Long-term FRMCS migration projects in Europe in 2029.



Artificial Intelligence

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The Power of IoT

From connectivity to intelligence - From IoT to Physical AI

AI in Factory

Industrial AI in real operation

- AI-driven quality inspection and process optimization
- Predictive maintenance and anomaly detection
- Pilot Factory: proven in our own production environment

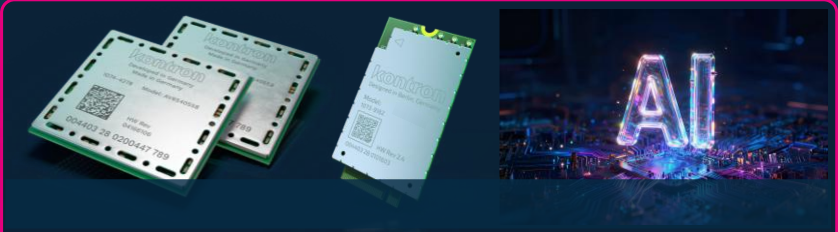
EFFICIENCY • RELIABILITY • FLEXIBILITY

AI in Development

Engineering at scale

- AI copilots across design, coding, testing and documentation
- Automated quality, consistency and compliance checks
- Reusable knowledge and platform building blocks

SPEED • QUALITY • SCALABILITY



AI in Products

From connectivity to intelligence

- 5G NADs and FRMCS as the connectivity foundation
- Real-time on-device and edge AI
- Foundation for intelligent mobility, robotics and Physical AI

CONNECTIVITY EVOLUTION

Rel.18	›	Rel.19	›	Rel.20
5G-Advanced		5G-Advanced		Completing 5G Advanced and bridging to 6G Standard
AI-enhanced connectivity		Connectivty + Intelligence Convergence		Foundation for AI-native networks

DIFFERENTIATION • SOFTWARE VALUE • GROWTH

Kontron combines **secure connectivity**, **edge intelligence** and **AI** to enable **Physical AI** in vehicles, railways, machines and robotics.

The Power of IoT

Platform Pillar IV
5G NADs
Q&A

kontron
The Power of IoT

Kontron & Ennoconn Driving Long-Term Growth Together

Steve Chu

Chairman and CEO
Ennoconn

Nelson Tsay

President
Ennoconn

Joe Fijak

Global EVP/COO
of Ennoconn

Ennoconn
樺漢科技 Solutions For Smart Future

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The Power of IoT

One Team One Family

Strengthening partnership between Ennoconn and Kontron

September 2026

Agenda

Innoconn 樺漢科技 Solutions For Smart Future

01 Deepening Collaboration & Earnings Upside

02 Joint Technology Platforms Driving Higher Margins

03 Global Edge & Physical AI Business Expansions

04 Q & A

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01

Deepening collaboration with increased stake

Tender Offer Completed; Integration Continues

- Ennoconn's tender offer on Kontron shares has been completed on August 20, and Ennoconn now holds around **48%** of Kontron stake.
- As such, Ennoconn is increasingly committed to support Kontron's long-term development to share resources and expand market and product scope, enhancing competitiveness of both sides.

One Team One Family

Ennoconn 樺漢科技 Solutions For Smart Future + kontron The Power of IoT

Ennoconn Background

Mar, 2007

Sep, 2020

Jan, 2021

Global SCM & DMS (HaaS : OEM / ODM / OBM)	ARM Based APU / SOC IoT Devices	Global SaaS / PaaS ESaaS

Ennoconn Operating Performance

Ennoconn 樺漢科技 Solutions For Smart Future

- 2013(USD 100M) ~ 2025(USD 4.6B), 45 times growth in terms of Revenue
- Annual revenue CAGR (2013 ~ 25) : 38%
- Annual net profit CAGR (2013 ~ 25) : 20%

Ennoconn's Strategy for Kontron

Ennoconn
樺漢科技 Solutions For Smart Future

- Supply Chain Scale
- Smart Manufacturing
- AI Factory

SCM & MFG Upscaling

- Google AI Edge
- Google Edge TPU/NPU
- TensorFlow Lite

Cloud & Edge AI Integration

- Genio HW SoCs
- NeuroPilot SDK
- DGX/RTX Spark

AI Chips & SoC Co-design

Value Creation for Kontron

Physical AI + Edge AI

Integration Engine

Ennoconn | **Kontron**

Real Impact Across Key Industries

Automation	Communications	Defense	Energy	Medical	Transportation	Avionics	Infotainment

Five Pillars Driving €80M in Structural Synergies - 1

Innoconn 樺漢科技 Solutions For Smart Future

Deepen integration through five strategic and product areas

Integration on five different aspects

1 R & D Organization

Integrating R&D, sales, and operations for innovations

2 Product & Solution

Expedite hardware/software integration with Physical AI

3 Global Supply Chain

Optimize supply chain to lower manufacturing costs

4 Global Manufacturing

Integrate global facilities to improve efficiencies

5 Global Market Focus

Leverage geographical advantage to expand global markets

Five Pillars Driving €80M in Structural Synergies - 2

Deepen integration through five strategic and product areas

Focus on five product fields to expand both-ways

Cost Efficiency & Restructuring

Market & Product Expansion

02

Joint Technology Platforms Driving Higher Margins

Joint Technology Platforms Driving Higher Margins

The Core Strategy — Three Dimensions of Collaboration

01 | Technology Cooperation

One Global Technology Platform

Integrate R&D, engineering, global IT and supply-chain resources across Ennoconn and Kontron.

- Lower R&D Cost
- Faster Development
- Shared Engineering

02 | Product Integration

Hardware + Software Integration

Ennoconn's rugged industrial computing platforms + Kontron's higher-margin embedded software and automation stack

- Kontron OS
- Kontron Pilot Factory
- Edge / Physical AI

03 | Market Expansion

The Foxconn Golden Triangle

Leverage Foxconn and Ennoconn's global manufacturing footprint to scale Kontron innovation beyond Europe.

Europe → APAC & North America

STRATEGIC OUTCOME

Shared Platforms → Higher Software Content → Faster Global Scale → Higher Margins

NVIDIA $3.5bn investment in MediaTek

From Cloud AI Factory to Edge AI and Physical AI – Accelerating AI Everywhere

Cloud AI Factory

Train the next generation of AI models

DATA CENTER

Edge AI

Bring AI closer to where data is created

EDGE

Device AI

More intelligent devices with powerful and efficient AI SoC

DEVICES

Physical AI

AI in the real world, powering intelligent machines

REAL WORLD

EXPAND THE AI ECOSYSTEM

MediaTek adopts NVIDIA NVLink Fusion to enable custom XPUs/ASICs and connect with NVIDIA's rack-scale AI infrastructure.

MORE DEVICE CHOICES

Hyperscalers and enterprises can use MediaTek custom silicon while staying on the NVIDIA architecture, interconnect and software ecosystem.

AI EVERYWHERE

Leverage MediaTek's strengths in ARM SoC, low power, connectivity, ASIC and advanced packaging to bring NVIDIA AI from data centers to every device.

GOAL Extend NVIDIA AI from expensive GPUs in data centers to every edge device and machine.

Technology Stack

From Multi-Architecture Hardware and Secure Edge Platforms to AI Automation and Physical AI Applications

How Ennoconn, Kontron, and strategic partners turn technology into deployable industrial intelligence

4 Physical AI Applications


Humanoid Robotics


Smart Factory


Software-Defined Vehicles


Rail / Smart Mobility


Autonomous Industrial Systems

3 AI & Automation

- AI Vision
- Sensor Fusion
- Predictive AI
- Robotics AI
- Device Orchestration
- Edge-to-Cloud Data Flow
- AI Model Management

2 Secure Edge Platform

- kontron — The Power of IoT
- KontronOS — EdgeOS
- KontronAIShield — Safety & Security
- Cybersecurity (End-to-End)
- Lifecycle Management
- Secure OTA / Device Control

Ennoconn + Foxconn

Industrialization & Productization Layer
Integrate · Customize · Manufacture · Scale

- Global Manufacturing
- Supply Chain Integration
- Go-to-Market Execution

1 Multi-Architecture Compute & Connectivity

intel — Broad Industrial Compute
x86 · AI PC · Edge Control
- x86 Platform
- AI PC / Edge Compute
- Control & Automation

MediaTek — Power-Efficient Edge AI
ARM · NPU · 5G Connectivity
- Edge AI SoC
- 5G / Connectivity
- Industrial Devices

NVIDIA — AI-Accelerated Compute
GPU · Jetson · Physical AI
- GPU / Jetson
- AI Acceleration
- Physical AI / Omniverse

Ennoconn integrates Intel, MediaTek and NVIDIA architectures into industrial-grade platforms, while Kontron adds the secure software layer to scale Edge AI and Physical AI solutions.

One Platform. More Possibilities.
For a Smarter, More Intelligent World.

03

Global Edge & Physical AI Business Expansions

Edge AI Is Entering a Decade of Hypergrowth

Intelligence is shifting from centralized clouds to the physical edge —
creating a structural growth opportunity for industrial computing and Physical AI.

Global Edge AI Market Size

(USD Billion, Fortune Business Insights, Aug 2026)

CAGR
~32.5%
(2025–2034)

A rapidly expanding market driven by real-world demand.

5 Structural Growth Engines

1. Real-Time Intelligence
Low-latency inference & autonomous decision-making

2. IoT + 5G at Scale
Billions of connected machines, sensors & endpoints

3. Data Sovereignty
Privacy, cybersecurity & regulatory requirements

4. AI Silicon Evolution
GPUs · NPUs · AI SoCs · power-efficient accelerators

5. Pilot → Mass Deployment
Enterprise AI moving from PoCs to fleet-scale rollouts

Strategy Takeaway

The next AI infrastructure cycle will not happen only in the cloud —
it will happen at the edge, where **Ennoconn and Kontron** already operate.

BUILT FOR A SMARTER, MORE SUSTAINABLE WORLD.

Source: Fortune Business Insights, Edge AI Market Size (Aug 2026).
Note: Market size and CAGR may vary by research firm due to different market definitions. Numbers are rounded.

Three Compute Platforms. One Industrial AI Strategy.

Different strengths. A broader market reach. Greater impact.

NVIDIA | High-Performance Physical AI

Accelerating the next generation of real-world AI.

Target Markets

Key Solutions

- Vision AI
- Autonomous Machine
- Rugged AI
- Physical AI

Performance. Real-time AI. GPU Acceleration.
From perception to action in the physical world.

intel | Industrial Compute Foundation

Proven performance. Trusted for what's next.

Target Markets

Key Solutions

- Industrial PC
- Edge Computing
- AI PC
- Control & Automation

Reliable. Scalable. Long Lifecycle.
The foundation for industrial and enterprise AI.

MediaTek | Scalable Edge & Device AI

Ubiquitous intelligence for a connected world.

Target Markets

Key Solutions

- Rugged Mobility
- Thermal Sensing
- Edge AI Computing
- Mission-critical Deployment

Low Power. Connectivity. High-volume Edge.
From devices to intelligent edge solutions.

Complementary Strengths Across the Full Spectrum

NVIDIA	intel	MediaTek
AI-Accelerated Compute (for Physical AI)	Broad Industrial Compute (for Enterprise & Industrial)	Power-Efficient Edge (for Devices at Scale)
High Performance Real-time AI	Versatile Compute Wide Deployment	Low Power Massive Scale

DIFFERENT ARCHITECTURES
A STRONGER TOMORROW

North American Commercial Strategy

樺漢科技 Solutions For Smart Future

Scaling Edge AI & Physical AI Across High-Value Vertical Markets

01 | INDUSTRIAL AI
The Foxconn "Golden Triangle"

Kontron

Software & IoT Platform

Embedded software, edge orchestration and industrial connectivity.

Ennoconn

Ruggedized Edge Compute

Industrial-grade computing platforms optimized for AI workloads.

FOXCONN

Scale Manufacturing & Execution

Global manufacturing, supply-chain scale and Physical AI deployment.

From hardware platforms to deployable Physical AI systems.

02 | SMART RETAIL & AUTONOMOUS OPERATIONS

NCR VOYIX

Strategic Platform

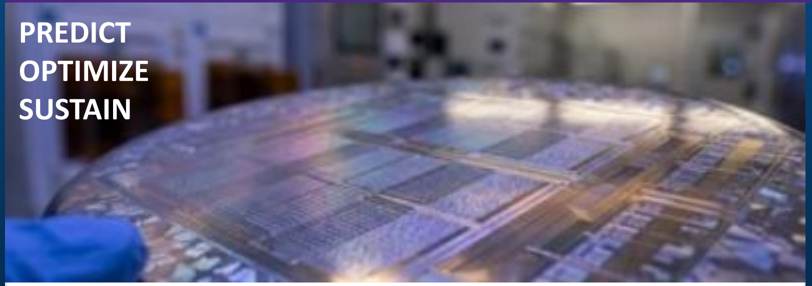
Leverage Ennoconn's NCR Voyix relationship and installed retail footprint

On-Device Physical AI

Enable real-time vision AI, intelligent checkout, predictive maintenance and autonomous store

Transform POS infrastructure into an AI-enabled retail platform.

03 | SEMICONDUCTOR FABS & INTELLIGENT INFRASTRUCTURE



Integrated Supply & Manufacturing

Combine Ennoconn, Kontron and group capabilities

Digital Twin & AI Facility Management

Connect equipment, energy, environmental and operational data

Expand from equipment supply into intelligent fab infrastructure.

THREE NORTH AMERICAN GROWTH ENGINES

Industrial AI | Autonomous Retail | Intelligent Semiconductor Infrastructure

BIGGER MAKETS | STRONGER CUSTOMERS | HIGHER SYNERGIES

Ennoconn
樺漢科技 Solutions For Smart Future
kontron
AI
kontron
The Power of IoT
ecure, Connected & CRA-ready Solutions
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04

榫漢科技 Solutions For Smart Future

Leading in Physical AI for smart global blueprint

Q & A

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Executive Q&A

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Closing Remarks

Thank you for your interest and participation

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