

Financial Information

Solid results with growth in all key financial metrics
Revenue of €23.6 bn, up 0.4% like-for like
Adjusted EBITA margin up 0.3 pt on organic basis
Net profit up +4% to €1.9 bn
Record Free Cash Flow of €2.2 bn, up 5%

Rueil-Malmaison (France), February 20, 2014 - Schneider Electric announced today its fourth quarter revenue and full year results for the period ending December 31, 2013.

Key figures (€ million)	2012 ¹	2013	% Organic change	% Reported change
Revenue	23,946	23,551	+0.4%	-2%
Adjusted EBITA % of sales	3,515 14.7%	3,412 14.5%	+3% +0.3 pt	-3% -0.2 pt
Net profit (Group share) Earnings per share (€)	1,813 3.34	1,888 3.43		+4% +3%
Free cash flow	2,082	2,187		+5%

Jean-Pascal Tricoire, Chairman and CEO, said: "We delivered solid results in a challenging environment in 2013. We grew 3% outside Western Europe, expanded our margin by 0.3 point at constant currencies and scope and achieved record free cash flow. This reflects the strength of our business model and our capability to adapt to a volatile environment.

We also filled a major technology gap in our portfolio with the acquisition of Invensys, which further enhances our capability to integrate power, automation and software to deliver complete efficiency solutions to our customers. In parallel, the full control of Electroshield – TM Samara reinforces our presence in key end-markets and steps up our footprint in Russia.

We shall now focus on integration of these businesses, capitalize on our technology innovation in products and solutions and optimize efficiency across the company. We see significant opportunities for growth and improving the return of our investment.

¹ 2012 figures restated for the application of IAS 19 Revised (pension accounting)

Investor Relations :
Schneider Electric
Anthony Song

Phone : +33 (0) 1 41 29 83 29
 Fax : +33 (0) 1 41 29 71 42
 www.schneider-electric.com

Press Contact :
Schneider Electric
Véronique Roquet-Montégon

Phone : +33 (0)1 41 29 70 76
 Fax : +33 (0)1 41 29 88 14

Press Contact :
DGM
Michel Calzaroni
Olivier Labesse

Phone : +33 (0)1 40 70 11 89
 Fax : +33 (0)1 40 70 90 46

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Looking into 2014, we see a rather positive economy in North America and China, initial signs of stabilization in Western Europe, while uncertainty remains in several new economies. On this basis, we expect low single-digit organic growth in revenue and 0.4 to 0.8 point improvement in the adjusted EBITA margin, excluding currency impacts, from the 2013 proforma level of ~14.0% including Invensys.”

I. FOURTH QUARTER REVENUE WAS UP 0.6% ORGANICALLY

Fourth quarter 2013 revenue was €6,220 million, up 0.6% like-for-like.

Organic growth analysis by business segment

€ million	Q4 2013			Full Year 2013		
	Revenue	Organic growth	Reported growth	Revenue	Organic growth	Reported growth
Partner	2,157	+1.7%	-3.1%	8,476	+0.2%	-3.0%
Infrastructure	1,686	-2.9%	0.0%	5,728	+1.2%	+6.7%
Industry	1,081	+5.2%	-2.7%	4,311	+1.3%	-3.8%
IT	877	-2.0%	-9.6%	3,442	-1.3%	-6.4%
Buildings	419	+2.5%	-5.6%	1,594	-0.2%	-5.2%
Group	6,220	+0.6%	-3.4%	23,551	+0.4%	-1.6%

Partner (35% of Q4 revenue) grew **1.7%** like-for-like. Product business was up, supported by continued investment in the residential market in the US, overall good performance in China and launch of mid-market offers in the new economies. Western Europe and Australia remained weak. The Solution business was down, as growth in China and in data centers projects in North America was weighed down by the decline in Western Europe and the Middle East.

Infrastructure (27% of Q4 revenue) was down **2.9%** organically. Product business declined due to low investment by utilities in China and continued weakness in Western Europe. Solutions business was down slightly facing a high comparable base. Systems growth in North America from investment in data centers and in many countries in oil & gas was dragged down by weak investment in utilities in Western Europe. Services continued to post double-digit growth.

Industry (17% of Q4 revenue) posted solid organic growth of **5.2%**, driven by a recovery of Products, which saw a good performance of low voltage drives and pick-up in OEM demand across regions. Solutions were slightly positive with continued mixed trends. The strong performance of OEM systems, mainly driven by demand for SoMachine OEM solutions, was offset by the decline of end-user solutions, impacted by weaknesses in mining in Australia and water in the United Kingdom. Services are up double-digit, driven by the success of field services across regions.

IT (14% of Q4 revenue) was down **2.0%** like-for-like. Product business grew slightly as the good performance in Asia-Pacific notably in Japan, India and Indonesia was weighed down by distributor

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Press Contact :
Schneider Electric
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Press Contact :
DGM
Michel Calzaroni
Olivier Labesse
Phone : +33 (0)1 40 70 11 89
Fax : +33 (0)1 40 70 90 46

Tél. : +33 (0) 1 41 29 83 29
Fax : +33 (0) 1 41 29 71 42
www.schneider-electric.com
ISIN : FR0000121972

Phone : +33 (0)1 41 29 70 76
Fax : +33 (0)1 41 29 88 14

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destocking in Russia and slight decline in Western Europe while North America was flat. Solution business was down presenting a mixed picture. North America continued to experience slow project activity for small to mid-sized data centers and Western Europe stabilized as Germany and Nordic countries saw development in data centers. Asia-Pacific observed good growth due to investment in data centers for IT, telecom and banks in China, India and South East Asia. Services continued to grow.

Buildings (7% of Q4 revenue) posted organic growth of **2.5%**. Product business declined while building management products were stable. Solutions grew on strong services, while building management systems remained difficult due to delayed spending and adjustment in the business model. The success of services reflects the pay-off of past investment as well as the strong performance of advanced services, especially energy performance contracting.

Solutions business was down **2%** organically in the fourth quarter and represented **43%** of revenue.

Organic growth analysis by geography

€ million	Q4 2013			Full Year 2013		
	Revenue	Organic growth	Reported growth	Revenue	Organic growth	Reported growth
Western Europe	1,780	-4%	-5%	6,629	-6%	-6%
Asia-Pacific	1,719	+7%	-2%	6,459	+5%	-1%
North America	1,451	+2%	-4%	5,898	+3%	-1%
Rest of the World	1,270	-3%	-2%	4,565	+1%	+3%
Group	6,220	+0.6%	-3.4%	23,551	+0.4%	-1.6%

Western Europe (29% of Q4 revenue) improved sequentially, posting **4%** decline year-on-year in the fourth quarter. Spain and Italy continued to decline, however at a lesser pace than in the previous quarter, due to an improvement of the export driven OEM business. France remained soft, showing mid-single digit decline. Germany was slightly negative, still challenged by its utility market but helped by its IT business. The U.K. was down but saw a pick-up in its industrial market. The Nordics posted growth.

Asia-Pacific (28% of Q4 revenue) was up **7%** year-on-year, as the region continued to perform well. Growth was strong across the board for the new economies in the region despite the momentary impact of currency volatility. China continued to benefit from investment in infrastructure and data centers. South East Asia observed good growth thanks to investment in projects related to construction, infrastructure and oil & gas, while India saw good development in IT and Infrastructure. Japan experienced good performance, while Australia remained a drag due to low mining and construction capex.

North America (23% of Q4 revenue) was up **2%** like-for-like. The US residential market continued to grow, while the non-residential market confirmed signs of improvement. The industry market was up on strong OEM demand. The data center segment for low and medium voltage and the oil & gas segment remained a support to growth.

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DGM
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Phone : +33 (0)1 41 29 70 76
Fax : +33 (0)1 41 29 88 14

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Rest of the World (20% of Q4 revenue) was down **3%** like-for-like. Russia declined due to slow utilities investment and soft IT markets. Middle East was down as the good growth in Turkey and Qatar was weighed down by the low infrastructure investment in UAE and Saudi Arabia. Africa posted double-digit growth thanks to investment in natural resources in South and West Africa. South America was down slightly as the impact of currency volatility and slowdown in the mining industry was not fully offset by the increased mid-market penetration.

Revenue in new economies was up **4%** organically and represented **44%** of total fourth quarter 2013 revenue.

Consolidation and foreign exchange impacts

Net acquisitions contributed €115 million or +1.8% of growth. This includes mainly Electrosshield-TM Samara (in the Infrastructure business).

The impact of currency fluctuations was negative at €370 million, primarily the result of the depreciation of U.S. Dollar, Australian Dollar, Indian Rupee, Brazilian Real and some other emerging market currencies against the Euro over the fourth quarter. The impact of currency depreciation was sharpened in the fourth quarter.

II. FULL YEAR 2013 KEY RESULTS

€ million	2012 ²	2013	% Organic change	% Reported change
Gross Margin	9,057	8,891	+2%	-2%
<i>% of revenue</i>	37.8%	37.8%	+0.5 pt	
Adjusted EBITA	3,515	3,412	+3%	-3%
<i>% of revenue</i>	14.7%	14.5%	+0.3 pt	-0.2 pt
Restructuring costs	(164)	(176)		
Other operating income & expenses	(10)	73		
Amortization & impairment of purchase accounting intangibles	(475)	(218)		
Operating income	2,866	3,091		+8%
Net income (Group share)	1,813	1,888		+4%
Earnings per share (€)	3.34	3.43		+3%
Free cash flow	2,082	2,187		+5%

² 2012 Net income and EPS figures restated for the application of IAS 19 Revised (pension accounting)

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Schneider Electric
Anthony Song

Tél. : +33 (0) 1 41 29 83 29
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Phone : +33 (0)1 41 29 70 76
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Fax : +33 (0)1 40 70 90 46

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▪ ADJUSTED EBITA MARGIN UP 0.3 POINT AT CONSTANT SCOPE AND CURRENCY BASIS THANKS TO STRONG PRODUCTIVITY

Gross margin improved +0.5 points at constant scope and currency. Industrial productivity was the key driver along with positive pricing for the organic improvement despite a low volume environment and unfavorable mix effect. Scope and currency impact weighed down on the performance, leading to a flat gross margin on a reported basis.

Full year 2013 adjusted EBITA was **€3,412 million**, representing **14.5%** of revenue.

The key drivers contributing to the earnings change were the following:

- In a low growth environment, volume was slightly positive at **€10 million**. Pricing actions added **€24 million** to the full year earnings in addition to a favorable raw material tailwind of **€51 million**.
- Supply chain initiatives under the “*Connect*” program continued to deliver results leading to solid industrial productivity of **€358 million**. Labor inflation represented an additional cost of **€75 million**.
- Compared with 2012, mix was less unfavorable in 2013, at negative **€169 million**. The mix impact was mainly due to geography and relative performance within product lines.
- The Group continued to invest in R&D and commercial initiatives for new economies and services, in line with the strategic plan. Support function costs had a negative impact of **€56 million** for the full year.

These elements drove a **0.3 point improvement** of the adjusted EBITA margin in 2013, before currency and scope impacts.

- The adverse evolution of foreign currencies, especially in new economies, namely Russia, India, Brazil and Indonesia, reduced the adjusted EBITA by **€233 million**.
- Contribution from acquisitions, net of divestments, was **€37 million**.

By business, adjusted EBITA of **Partner** was €1,801 million, or **21.2%** of revenue, up 0.5 point year-on-year due to good industrial productivity. **Infrastructure** adjusted EBITA amounted to €560 million or **9.8%** of revenue, down 0.9 point impacted by one off charges from delays in project execution and difficulties in transportation business in Spain. **Industry** generated an adjusted EBITA of €833 million, or **19.3%** of revenue which was up 0.9 point, thanks to positive pricing and good control of commercial costs. **IT** business reported an adjusted EBITA of €650 million, **18.9%** of revenue, in line with the record level achieved last year (19.0%). Full year 2013 profitability of **Buildings** was down 0.5 point at **5.9%** of revenue, or €94 million, due to low volume in mature markets and unfavorable mix in the first half while the second half showed improvement in adjusted EBITA margin of 1.1 point.

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Schneider Electric
Anthony Song

Tél. : +33 (0) 1 41 29 83 29
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Press Contact :
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Véronique Roquet-Montégon

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Fax : +33 (0)1 41 29 88 14

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Fax : +33 (0)1 40 70 90 46

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Corporate costs were **€526 million** or 2.2% of revenue, a similar level as in the previous year.

Reported EBITA was **€3,309 million**. It includes €176 million of restructuring costs, in line with the “Connect” initiatives and a positive impact of €73 million of other operating income and expenses, including one-time gains from pensions.

▪ NET INCOME UP 4% DESPITE INCREASED TAX AND FOREIGN EXCHANGE IMPACT

The amortization and depreciation of intangibles was **€218 million**, compared to €475 million last year, that included a non-recurring and non-cash impairment charge.

Net financial expenses reached **€483 million**, slightly up from 2012. Within this, the cost of net financial debt improved to €324 million from €349 million in 2012. However, other financial income and expenses included a €50 million charge for the fair value adjustment of the Group’s 9.2% stake in its partner NVC Lighting.

Income tax amounted to **€665 million** corresponding to an effective tax rate of 25.5%³, up 2.6 points compared to the previous year⁴.

The net income was **€1,888 million** for 2013, up 4%.

▪ RECORD CASH GENERATION IN 2013

Free cash flow was record high at **€2,187 million** driven by lower working capital and well managed capital expenditure. The decrease in receivables and prudent management of payables were the key drivers for a decrease of **€228 million** in the working capital.

The free cash flow included **€714 million** of net capital expenditure, representing 3.0% of revenue as expected.

On a full year basis, the free cash flow conversion reached a strong level of 116% of net income.

▪ SOLID BALANCE SHEET

Schneider Electric’s net debt decreased to **€3,331 million** (€4,395 million in December 2012) thanks to the high free cash flow that more than offset €1,025 million of dividend payment and €330 million of acquisitions.

³ 25.0% effective tax rate adjusted for the non-deductibility of the charge for NVC Lighting fair value adjustment

⁴ 2012 figures restated for the application of IAS 19 Revised

Investor Relations :
Schneider Electric
Anthony Song

Tél. : +33 (0) 1 41 29 83 29
Fax : +33 (0) 1 41 29 71 42
www.schneider-electric.com
ISIN : FR0000121972

Press Contact :
Schneider Electric
Véronique Roquet-Montégon

Phone : +33 (0)1 41 29 70 76
Fax : +33 (0)1 41 29 88 14

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DGM

Michel Calzaroni
Olivier Labesse

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Fax : +33 (0)1 40 70 90 46

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III. PROPOSED DIVIDEND OF 1.87 EURO

At the Annual Meeting on May 6, 2014, shareholders will be asked to approve a dividend of €1.87 per share, stable compared to 2012. The proposed dividend will be paid fully in cash on May 19, 2014.

IV. CONNECT UPDATE

2013 marked the second year of the Group's Connect company program, which will end in 2014. We executed well on our Connect initiatives:

- Service growth rate (organic) was strong as Services outgrew the rest of the group by 7 points per annum on average.
- Solutions Adjusted EBITA margin in 2013 was up 1 point compared to the margin in 2011. The improvement in Adjusted EBITA in 2013 was offset by the negative impact from currencies.
- Industrial Productivity amounted to €647 million cumulatively, driven by tailored supply chain initiatives, enhanced purchasing expertise and optimization of the industrial footprint.
- The support function cost to revenue ratio was stable, as the savings initiatives were offset not only by inflation but also continued investment in Services and the new economies in an unfavorable volume environment.
- Inventory efficiency improved as the inventory to revenue ratio was reduced by 1.5 points since 2011.

Moving forward, we will continue to improve our efficiency while investing in R&D, commercial coverage in new economies and services development, to fuel the long term growth of the company. The Group confirms the following objectives for the end of the Connect program in 2014:

- Service growth rate of +5 points higher than rest of the group
- Solutions Adjusted EBITA margin up by 2 points versus the margin at end of 2011
- Cumulative Industrial Productivity of €1.0-1.1 billion since end of 2011
- Continue to focus on optimizing R&D and maximizing commercial and back office efficiency
- Inventory to revenue ratio to be reduced by 2 points versus the ratio at end of 2011

The targets exclude the impact of the integration of Invensys.

Investor Relations :
Schneider Electric
Anthony Song

Tél. : +33 (0) 1 41 29 83 29
Fax : +33 (0) 1 41 29 71 42
www.schneider-electric.com
ISIN : FR0000121972

Press Contact :
Schneider Electric
Véronique Roquet-Montégon

Phone : +33 (0)1 41 29 70 76
Fax : +33 (0)1 41 29 88 14

Press Contact :
DGM
Michel Calzaroni
Olivier Labesse

Phone : +33 (0)1 40 70 11 89
Fax : +33 (0)1 40 70 90 46

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V. 2014 OUTLOOK

Recent trends indicate that North America should continue to grow though the first quarter would be impacted by severe weather. Western Europe is showing initial signs of stabilization with potential for improvement in the second half. End-market trends in China continue to be solid. Uncertainty remains in several new economies due to currency volatility.

The 2013 proforma adjusted EBITA margin including the last 12 months of Invensys⁵ to September 2013 and the full consolidation of Electroshield - TM Samara is ~14.0%.

Based on current market conditions, the Group targets for 2014:

- low single-digit organic growth in revenue
- 0.4 pt to 0.8 pt improvement of the adjusted EBITA margin vs. the 2013 proforma level excluding the currency impact. The negative currency impact is currently estimated at ~0.4 pt, with most of the impact concentrated in H1

The financial statements of the period ending December 31, 2013 were established by Board of directors on February 19, 2014 and certified by the Group auditors on February 19, 2014.

The full year 2013 consolidated financial statements and result presentation are available at www.schneider-electric.com

First-quarter 2014 revenue will be released on April 24, 2014.

About Schneider Electric

As a global specialist in energy management with operations in more than 100 countries, Schneider Electric offers integrated solutions across multiple market segments, including leadership positions in energy and infrastructure, industrial processes, building automation, and data centres/networks, as well as a broad presence in residential applications. Focused on making energy safe, reliable, efficient, productive and green, the company's 150,000 plus employees achieved sales of 24 billion euros in 2013, through an active commitment to help individuals and organizations "Make the most of their energy."

www.schneider-electric.com

⁵ Without Appliance division.

Investor Relations :
Schneider Electric
Anthony Song

Tél. : +33 (0) 1 41 29 83 29
Fax : +33 (0) 1 41 29 71 42
www.schneider-electric.com
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Press Contact :
Schneider Electric
Véronique Roquet-Montégon

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Fax : +33 (0)1 41 29 88 14

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DGM
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Olivier Labesse

Phone : +33 (0)1 40 70 11 89
Fax : +33 (0)1 40 70 90 46

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Appendix – Revenue breakdown by business

Fourth quarter 2013 revenue by business was as follows:

€ million	Q4 2013				
	Revenue	Organic growth	Changes in scope of consolidation	Currency effect	Reported growth
Partner	2,157	+1.7%	+0.7%	-5.5%	-3.1%
Infrastructure	1,686	-2.9%	+8.4%	-5.5%	0.0%
Industry	1,081	+5.2%	-1.8%	-6.1%	-2.7%
IT	877	-2.0%	-0.9%	-6.7%	-9.6%
Buildings	419	+2.5%	-3.0%	-5.1%	-5.6%
Group	6,220	+0.6%	+1.8%	-5.8%	-3.4%

Full year 2013 revenue by business was as follows:

€ million	FY 2013				
	Revenue	Organic growth	Changes in scope of consolidation	Currency effect	Reported growth
Partner	8,476	+0.2%	+0.2%	-3.4%	-3.0%
Infrastructure	5,728	+1.2%	+9.1%	-3.6%	+6.7%
Industry	4,311	+1.3%	-1.4%	-3.7%	-3.8%
IT	3,442	-1.3%	-0.3%	-4.8%	-6.4%
Buildings	1,594	-0.2%	-1.8%	-3.2%	-5.2%
Group	23,551	+0.4%	+1.7%	-3.7%	-1.6%

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Anthony Song

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Schneider Electric
Véronique Roquet-Montégon

Phone : +33 (0)1 41 29 70 76
Fax : +33 (0)1 41 29 88 14

Press Contact :
DGM
Michel Calzaroni
Olivier Labesse

Phone : +33 (0)1 40 70 11 89
Fax : +33 (0)1 40 70 90 46

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Appendix – Breakdown by geography

Fourth quarter 2013 revenue by geographical region was as follows:

€ million	Q4 2013		
	Revenue	Organic growth	Reported growth
Western Europe	1,780	-4%	-5%
Asia-Pacific	1,719	+7%	-2%
North America	1,451	+2%	-4%
Rest of the World	1,270	-3%	-2%
Group	6,220	+0.6%	-3.4%

Full year 2013 revenue by geographical region was as follows:

€ million	FY 2013		
	Revenue	Organic growth	Reported growth
Western Europe	6,629	-6%	-6%
Asia-Pacific	6,459	+5%	-1%
North America	5,898	+3%	-1%
Rest of the World	4,565	+1%	+3%
Group	23,551	+0.4%	-1.6%

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Anthony Song

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Appendix – Consolidation impact on revenue and EBITA

In number of months	2013				2014			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
M&C Energy Group Buildings business FY 30/6/12e revenue £35 million	3m	3m						
Electroshield-TM Samara Infrastructure business Average annual revenue of more than RUB 20 billion since acquisition of 50% stake in 2010		3m	3m	3m	3m			
Invensys Industry business (+ partly Buildings & Partner business) FY 30/9/13 revenue £1,450 million excluding Appliance					3m	3m	3m	3m

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Phone : +33 (0)1 40 70 11 89
Fax : +33 (0)1 40 70 90 46

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Appendix - Results breakdown by division

€ million	2012	2013
Revenue	23,946	23,551
Partner	8,738	8,476
Infrastructure	5,366	5,728
Industry	4,483	4,311
IT	3,677	3,442
Buildings	1,682	1,594
Corporate	-	-
Adjusted EBITA	3,515	3,412
Partner	1,813	1,801
Infrastructure	575	560
Industry	823	833
IT	698	650
Buildings	107	94
Corporate	(501)	(526)
- Other operating income and expenses	(10)	73
Partner	17	53
Infrastructure	(6)	(17)
Industry	(2)	35
IT	(3)	(5)
Buildings	(3)	9
Corporate	(13)	(2)
- Restructuring	(164)	(176)
Partner	(84)	(74)
Infrastructure	(32)	(59)
Industry	(21)	(22)
IT	(4)	(7)
Buildings	(12)	(12)
Corporate	(11)	(2)
EBITA	3,341	3,309
Partner	1,746	1,780
Infrastructure	537	484
Industry	800	846
IT	691	638
Buildings	92	91
Corporate	(525)	(530)

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Anthony Song

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