STMicroelectronics

February 23, 2016
Barcelona

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Agenda

Agenda

- 9:30 am — ST Making everything smarter
  Meeting the needs of the IoT
  Smart Connected Driving
  Takeaways
- Questions & Answers
- 11:00 am — End

Speakers

Carlo Ferro
Chief Financial Officer

Claude Dardanne
EVP, General Manager, MDG

Benedetto Vigna
EVP, General Manager, AMG

Marco Monti
EVP, General Manager, ADG

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Forward Looking Statements

Some of the statements contained in this release that are not historical facts are statements of future expectations and other forward-looking statements (within the meaning of Section 27A of the Securities Act of 1933 or Section 21E of the Securities Exchange Act of 1934, each as amended) that are based on management's current views and assumptions, and are conditioned upon and also involve known and unknown risks and uncertainties that could cause actual results, performance, or events to differ materially from those anticipated by such statements, due to, among other factors:

- *Uncertain macro-economic and industry trends;*
- *Customer demand and acceptance for the products which we design, manufacture and sell;*
- *Unanticipated events or circumstances, which may either impact our ability to execute the planned reductions in our net operating expenses and / or meet the objectives of our R&D Programs, which benefit from public funding;*
- *Financial difficulties with any of our major distributors or significant curtailment of purchases by key customers;*
- *The loading, product mix, and manufacturing performance of our production facilities;*
- *The functionalities and performance of our IT systems, which support our critical operational activities including manufacturing, finance and sales, and any breaches of our IT systems or those of our customers or suppliers;*
- *Variations in the foreign exchange markets and, more particularly, the U.S. dollar exchange rate as compared to the Euro and the other major currencies we use for our operations;*
- *The impact of intellectual property ("IP") claims by our competitors or other third parties, and our ability to obtain required licenses on reasonable terms and conditions;*
- *The ability to successfully restructure underperforming business lines and associated restructuring charges and cost savings that differ in amount or timing from our estimates;*
- *Changes in our overall tax position as a result of changes in tax laws, the outcome of tax audits or changes in international tax treaties which may impact our results of operations as well as our ability to accurately estimate tax credits, benefits, deductions and provisions and to realize deferred tax assets;*
- *The outcome of ongoing litigation as well as the impact of any new litigation to which we may become a defendant;*
- *Product liability or warranty claims or recalls by our customers for products containing our parts;*
- *Natural events such as severe weather, earthquakes, tsunamis, volcano eruptions or other acts of nature, health risks and epidemics in locations where we, our customers or our suppliers operate;*
- *Changes in economic, social, labor, political, or infrastructure conditions in the locations where we, our customers, or our suppliers operate, including as a result of macro-economic or regional events, military conflict, social unrest, labor actions, or terrorist activities;*
- *Availability and costs of raw materials, utilities, third-party manufacturing services, or other supplies required by our operations.*

Such forward-looking statements are subject to various risks and uncertainties, which may cause actual results and performance of our business to differ materially and adversely from the forward-looking statements. Certain forward-looking statements can be identified by the use of forward looking terminology, such as "believes," "expects," "may," "are expected to," "should," "would be," "seeks" or "anticipates" or similar expressions or the negative thereof or other variations thereof or comparable terminology, or by discussions of strategy, plans or intentions.

Some of these risk factors are set forth and are discussed in more detail in "Item 3. Key Information — Risk Factors" included in our Annual Report on Form 20-F for the year ended December 31, 2014, as filed with the SEC on March 3, 2015. Should one or more of these risks or uncertainties materialize, or should underlying assumptions prove incorrect, actual results may vary materially from those described in this release as anticipated, believed, or expected. We do not intend, and do not assume any obligation, to update any industry information or forward-looking statements set forth in this release to reflect subsequent events or circumstances.

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ST making everything smarter

Carlo Ferro
Chief Financial Officer

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ST at a Glance

Making **driving** safer, greener and more connected

Making **homes** smarter, for better living, higher security, and less waste

- A global semiconductor leader
- 2015 revenues of **$6.90B**
- **21%** R&D/Sales

Making everyday **things** smarter, connected and more aware of their surroundings

Enabling the evolution of **industry** towards smarter, safer and more efficient factories and workplaces

Enabling **cities** to make more of available resources

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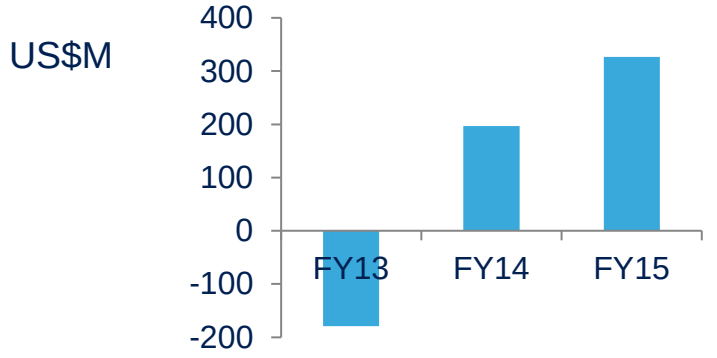
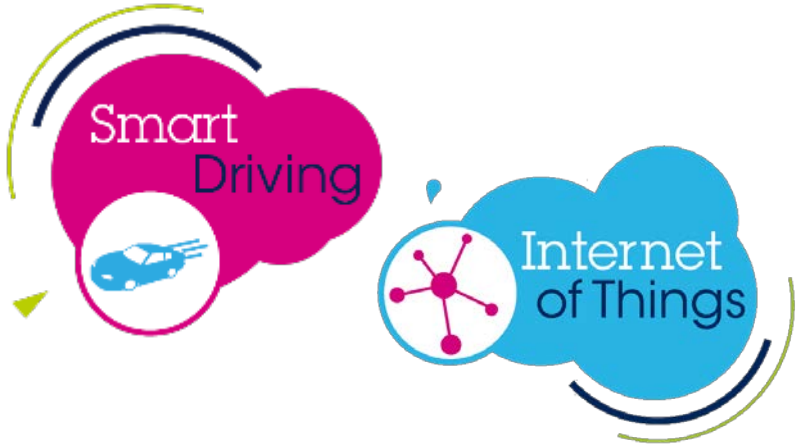
Takeaways from our FY2015 Earnings

- ST has turned the page and entered a new phase
  - Financial metrics improved
  - Room to further improve profitability
- Set-top box plan announced
  - Discontinue development of new platforms and standard products
- Renewed focus on growth in 2016 centered on two core applications:
  - Smart Driving
  - Internet of Things

Free Cash Flow* = $327M





*Non-GAAP measures – see Appendix

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Application Strategic Focus

The leading provider of products and solutions
for Smart Driving and the Internet of Things

Smart Driving

Safer

More connected

Greener

Internet of Things

Smart Industry

Smart Home

Smart City

Smart Things

Addressing a Serviceable Available Market (SAM) of around $150B

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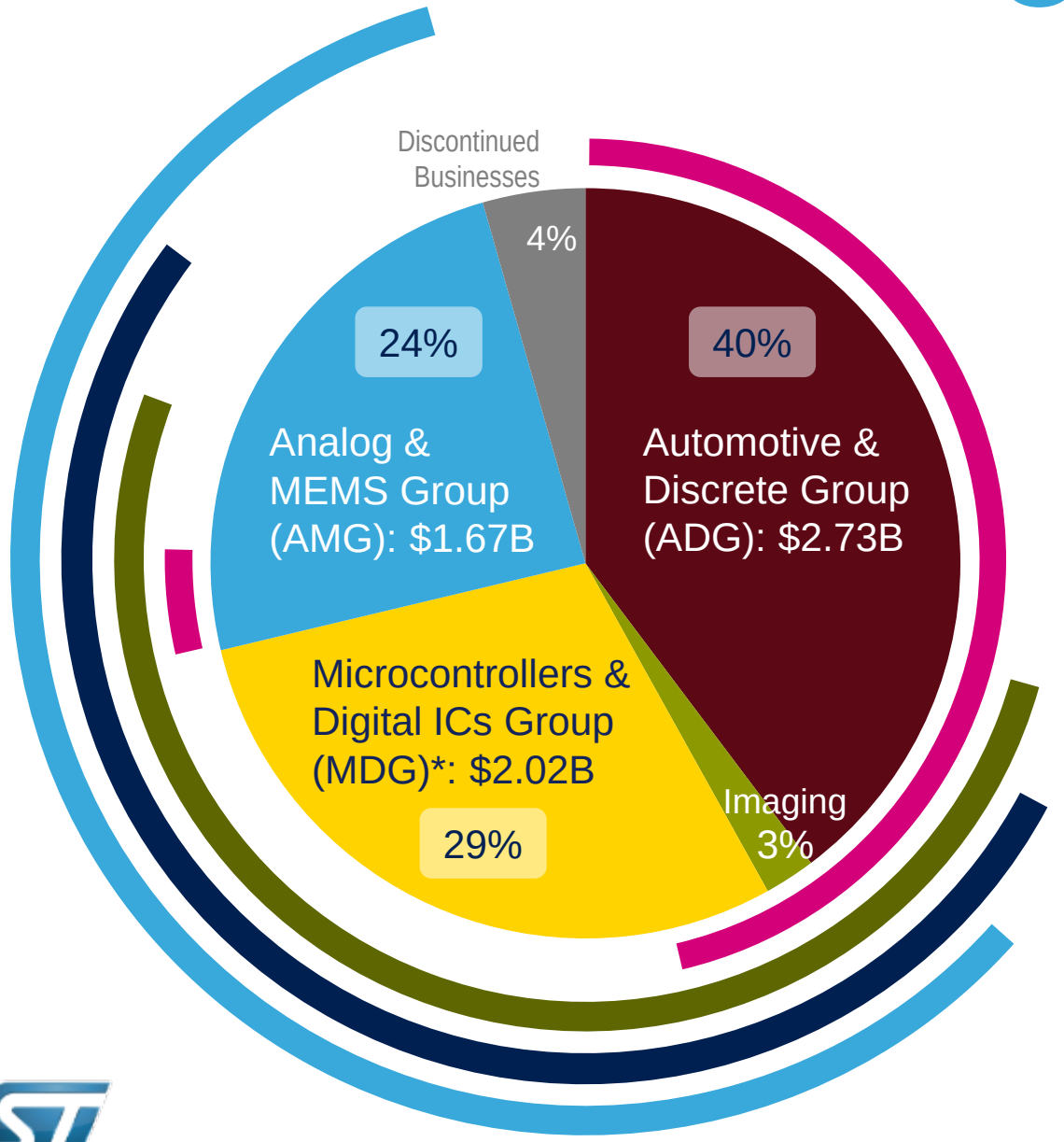
Preliminary numbers
based on FY15 Revenues

Organization Aligned to Strategic Focus

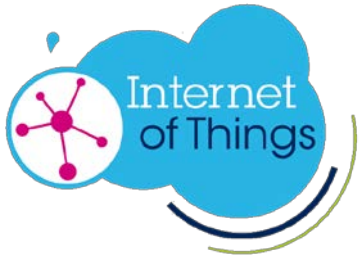


Smart Driving

Smart Industry

Smart Home & City

Smart Things



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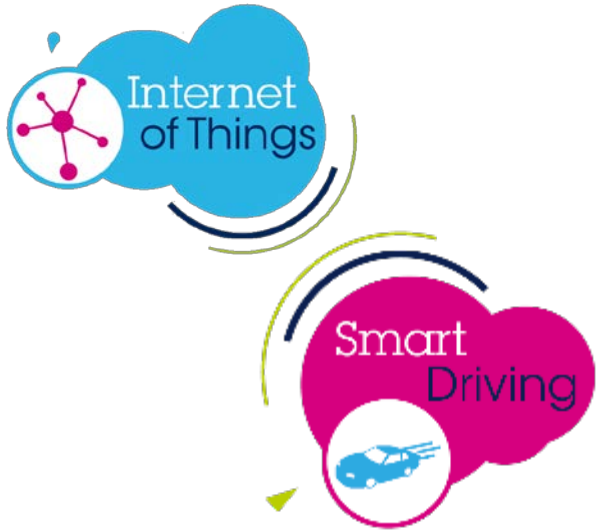
*MDG excludes Set-Top Box business

ST Making Everything Smarter

MEMS Sensors & Actuators

- Motion Sensors
- Environmental Sensors
- MEMS microphones
- Ranging & ambient light sensor
- FingerTip Touch Sensor
- MEMS mirrors



Automotive

- Automotive Microcontrollers
- Infotainment and Telematics
- V2X
- Radar & Vision ADAS
- Automotive Sensors
- Power & Smart Power

Power Management

- AMOLED power supply
- Backlight driver
- Power conversion
- Wireless charging
- Energy harvesting
- Thin film batteries

Microcontrollers & NFC

- General purpose Microcontrollers
- Secure microcontrollers
- Dynamic NFC tags
- EEPROM

Connectivity, Audio, Interfaces and RF

- Audio processors Audio amplifiers
- Antenna tuning
- Ultra-low power connectivity
- RF-SOI for Front End Modules
- High-speed interfaces
- Protection & EMI-filtering devices

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ST Making Everything Smarter

MEMS Sensors & Actuators

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- MEMS mirrors

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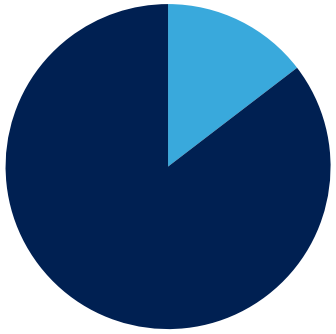
Wireless is Important

2015 Revenues



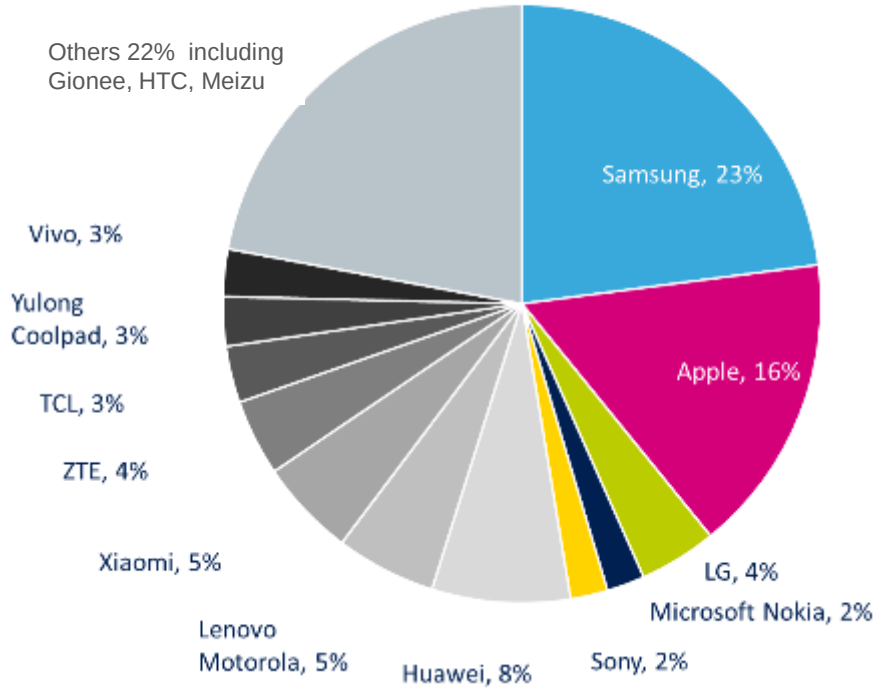
Wireless
$1 Billion

Key revenue contributors:

- MEMS and sensors
- Microcontrollers
- Power management
- Imaging

Customers

Top 10 ST wireless customers represent 70% of the smartphone market



Smartphone Unit Shipments 2015

Source: IC Insights

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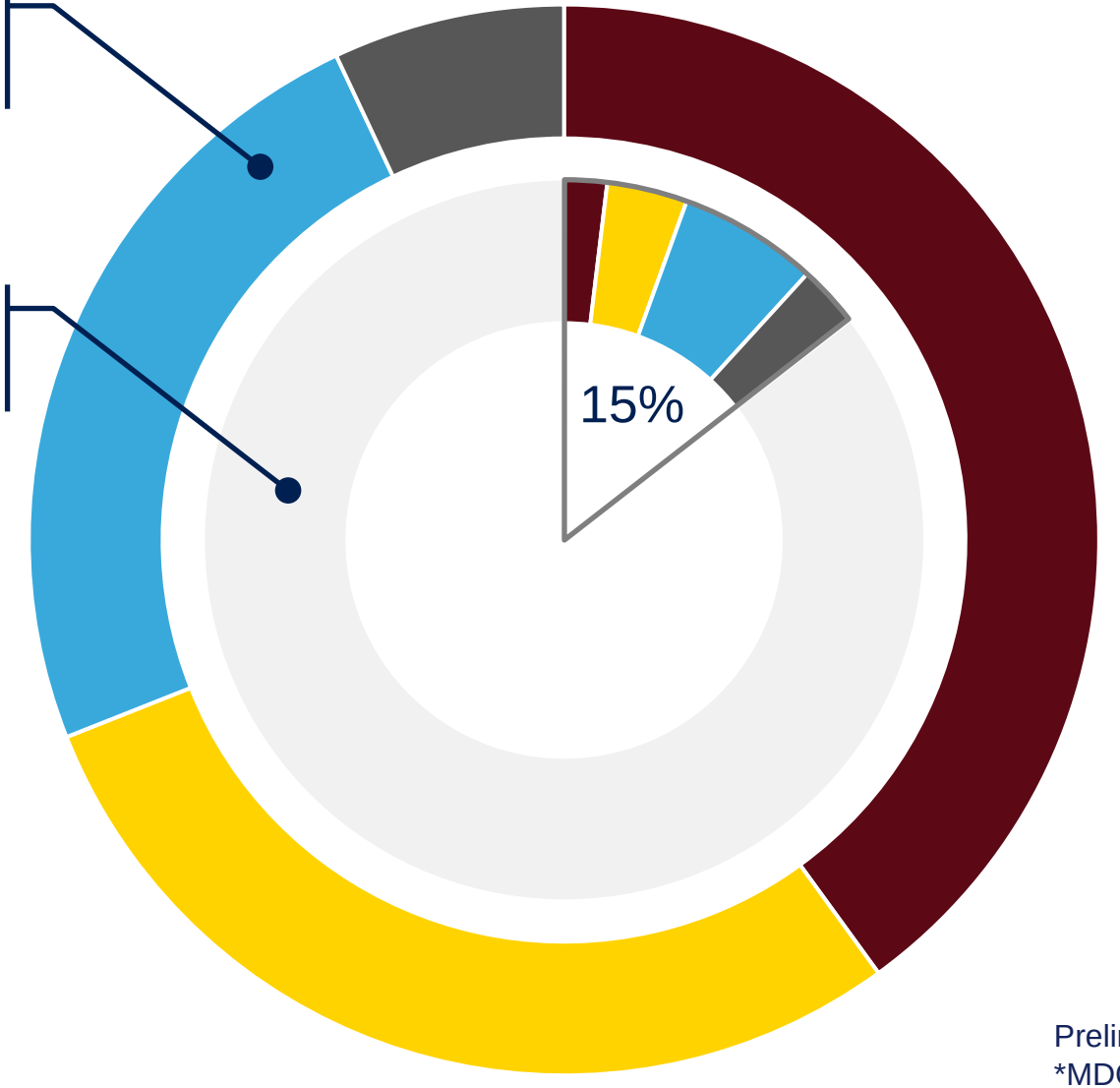
New Groups Exposure to Wireless

Based on 2015 revenues

Split of ST's total revenue per group

Wireless contribution to ST's total revenue



- Automotive & Discrete Group (ADG): $2.73B
- Microcontrollers & Digital ICs Group (MDG)*: $2.02B
- Analog & MEMS Group (AMG): $1.67B
- Others** $477M

Preliminary numbers
*MDG excludes Set-Top Box business
**Including Imaging division and Mobile Legacy Products

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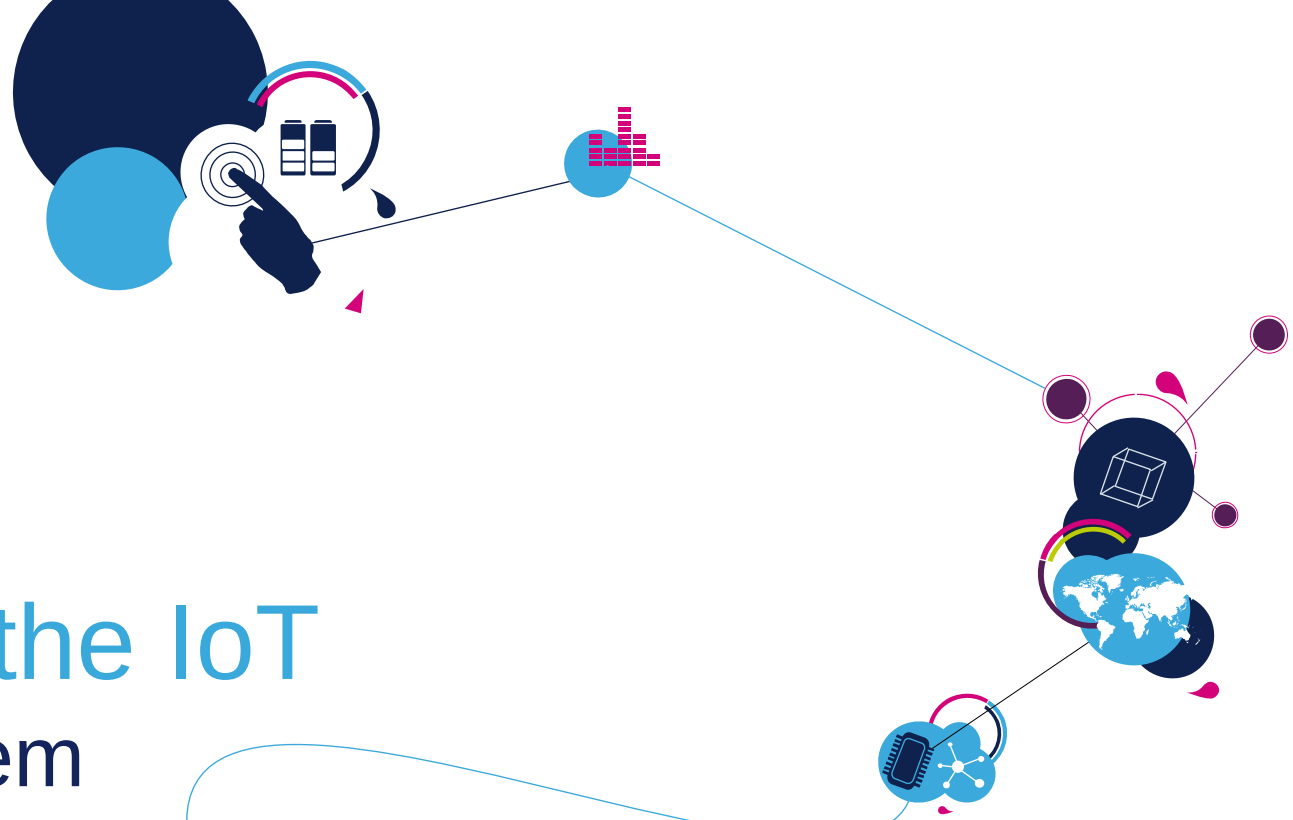

Meeting the needs of the IoT

Microcontrollers & Ecosystem

Claude Dardanne
Executive Vice President
General Manager, Microcontrollers and Digital ICs Group

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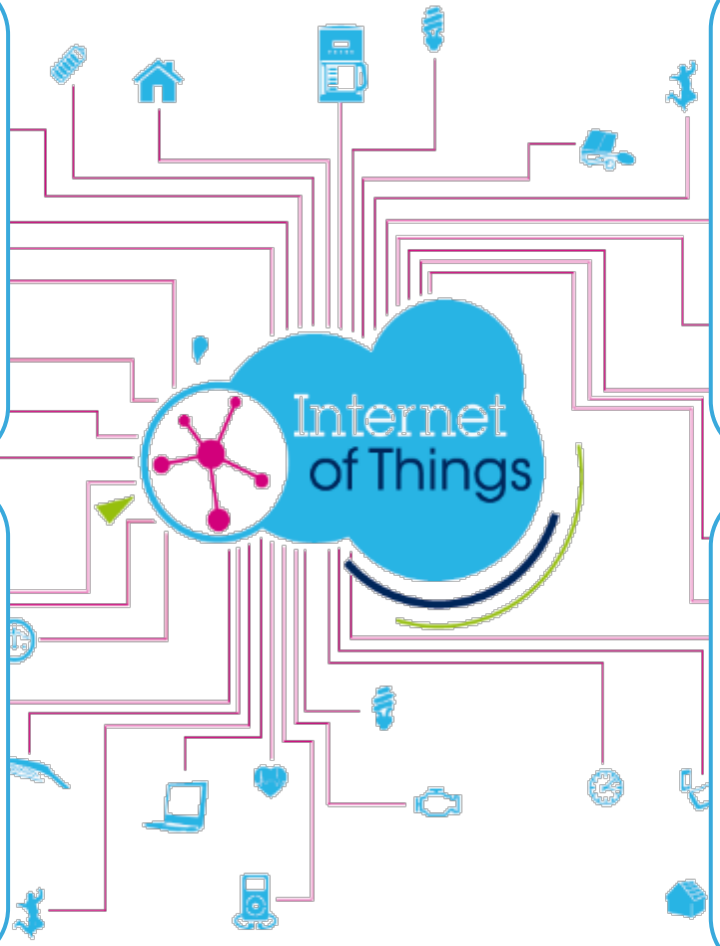
IoT Devices come in many Form Factors



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…but their Needs are the same

Versatile embedded platform

Connectivity

Security, privacy

Sensors, Analog and Power

Cost-effective development platform

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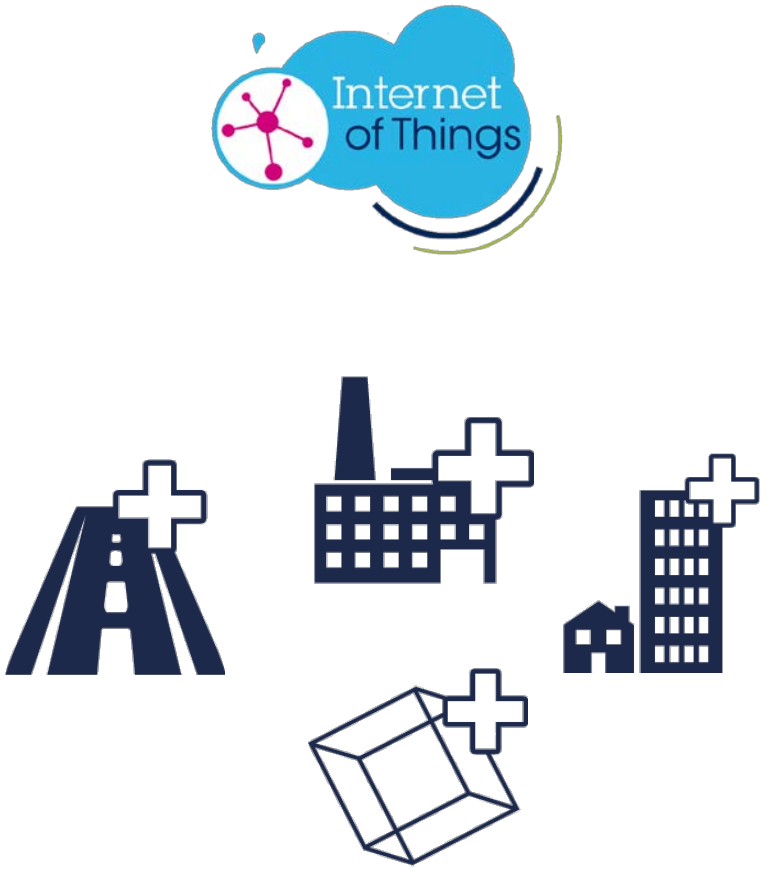
IoT Landscape

Securely connecting any device to any service



Connectivity

Processing

Security

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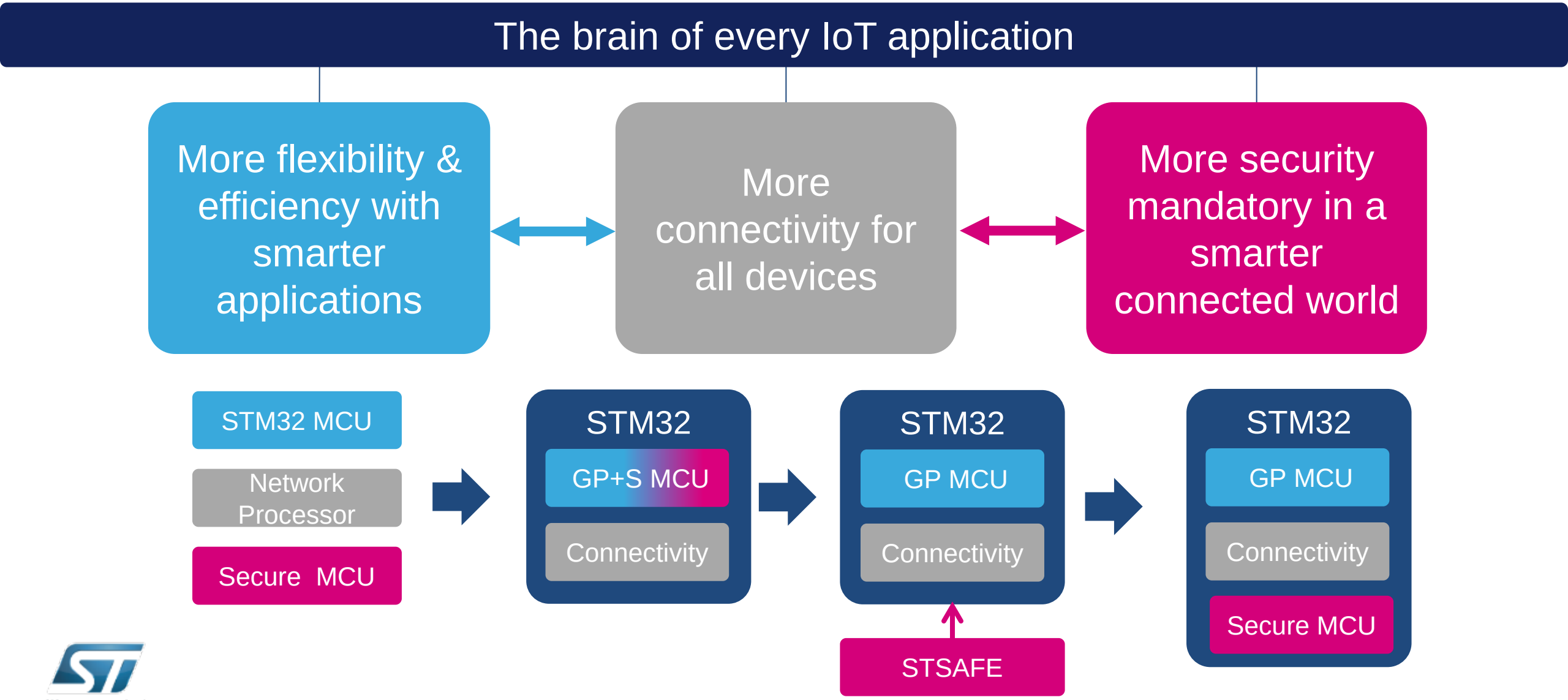
Microcontrollers enabling IoT



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Microcontroller Market Trend

Growth driven by IoT deployment

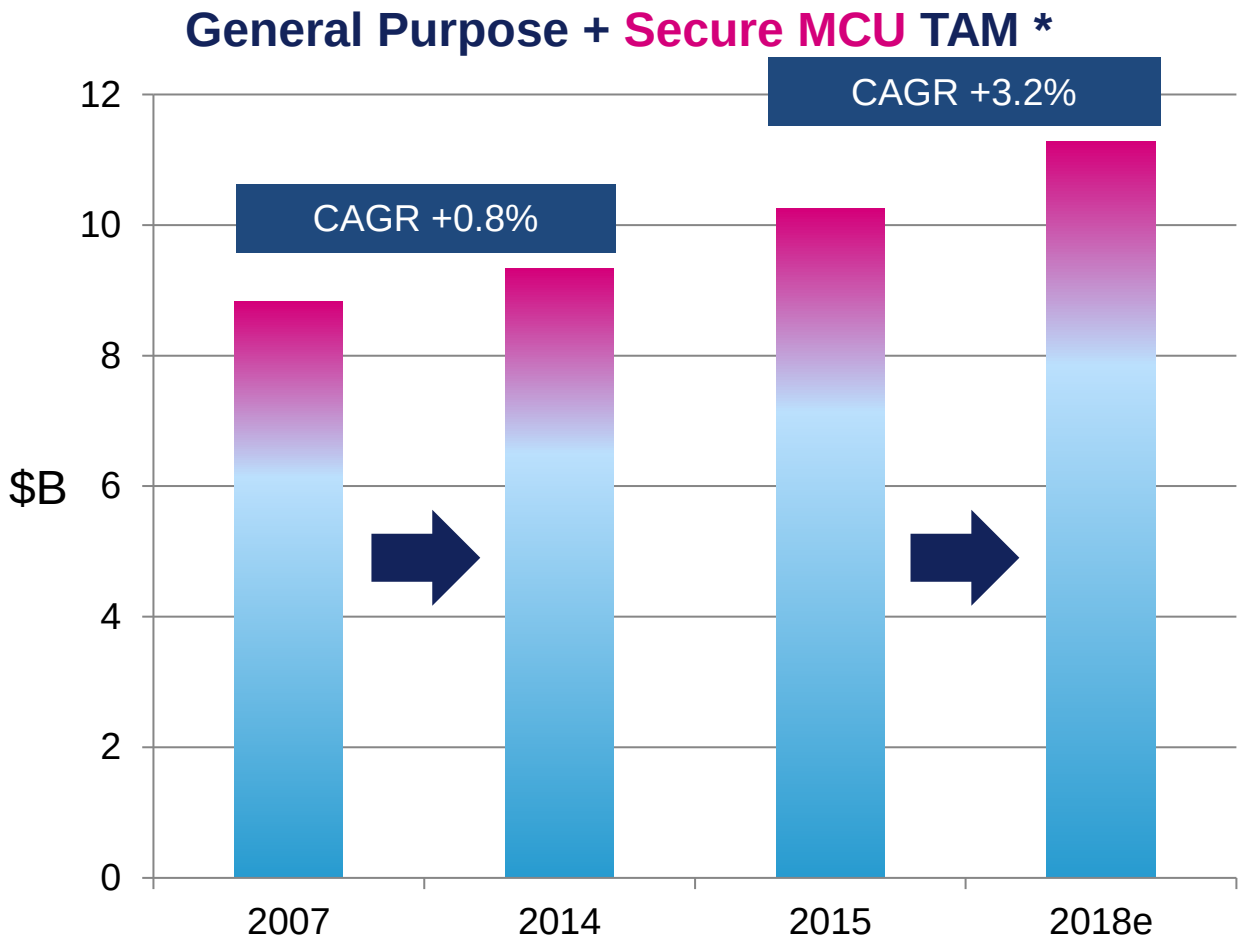
Market Dynamics

2007 – 2014: Limited growth

- Secure MCU growth :
  - Secure Smartcard solutions : Banking, ID
  - Object authentication (Brand protection…)
- General Purpose revenues impacted by $ ASP trend

2015 – 2018: Significant growth

- General Purpose Microcontrollers embedding advanced connectivity and security features
  - Wearable market, smart home
- Secure Microcontrollers
  - Mobile transactions: NFC and contactless migration



* Excluding Automotive

Source: WSTS February 2016

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General Purpose Microcontrollers

- Addressing multi-application, multi-customer
- STM32 platform with added value

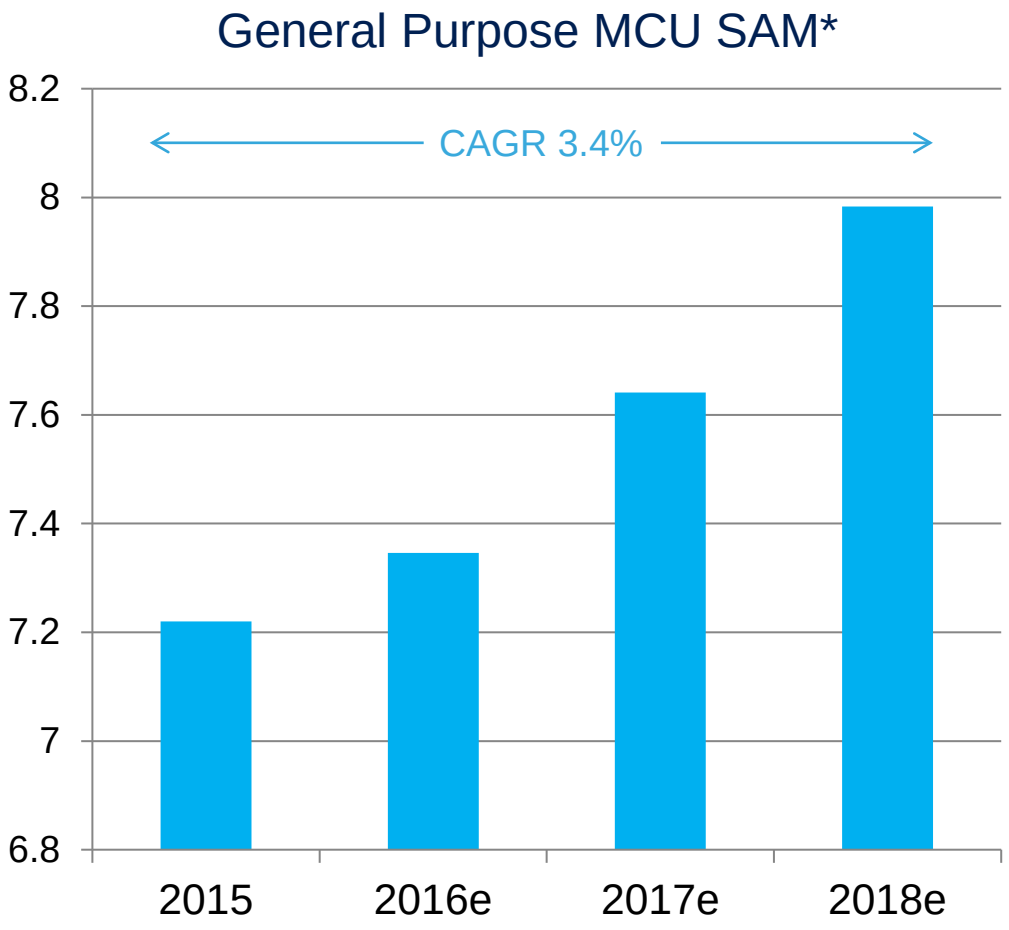
Performance
- Higher computing power
- Advanced peripherals
- More connectivity & security

Ultra low power
- Low power consumption
- Optimized functional modes
- Smaller form factor

Easy development
- Extended ecosystem
- Low entry barrier
- Open development environment

Cost effective
- High level of integration
- Reduced development efforts
- Easy application upgrades

Above features fitting perfectly IoT needs



* Excluding Automotive
Source: WSTS February 2016

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Secure Microcontrollers

- Secure Element & Contactless
- ST31 & ST33 platforms with added value :

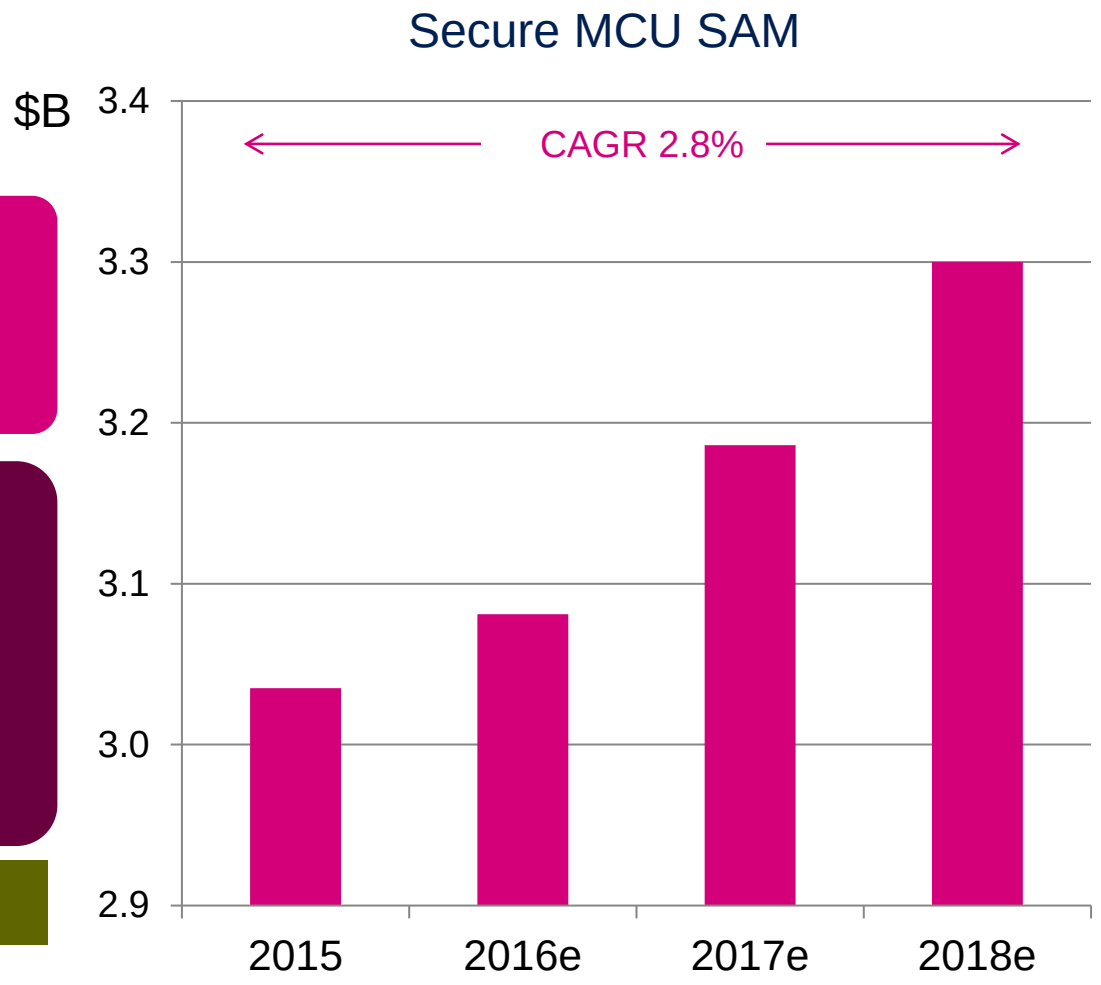
State-of-the-art security
- Certified HW solutions
- High performance crypto accelerators

Connectivity
- Best interoperability
- Highest robustness

Turn-key solutions
- Certified HW & SW solutions
- Dedicated development tools & support team
- Product customization and personalization services

Cost effective
- Products based on state-of-the-art Flash process
- Reduced development effort
- Easy application upgrades
- Advanced packaging options

Above features fitting perfectly IoT needs



Source: WSTS February 2016

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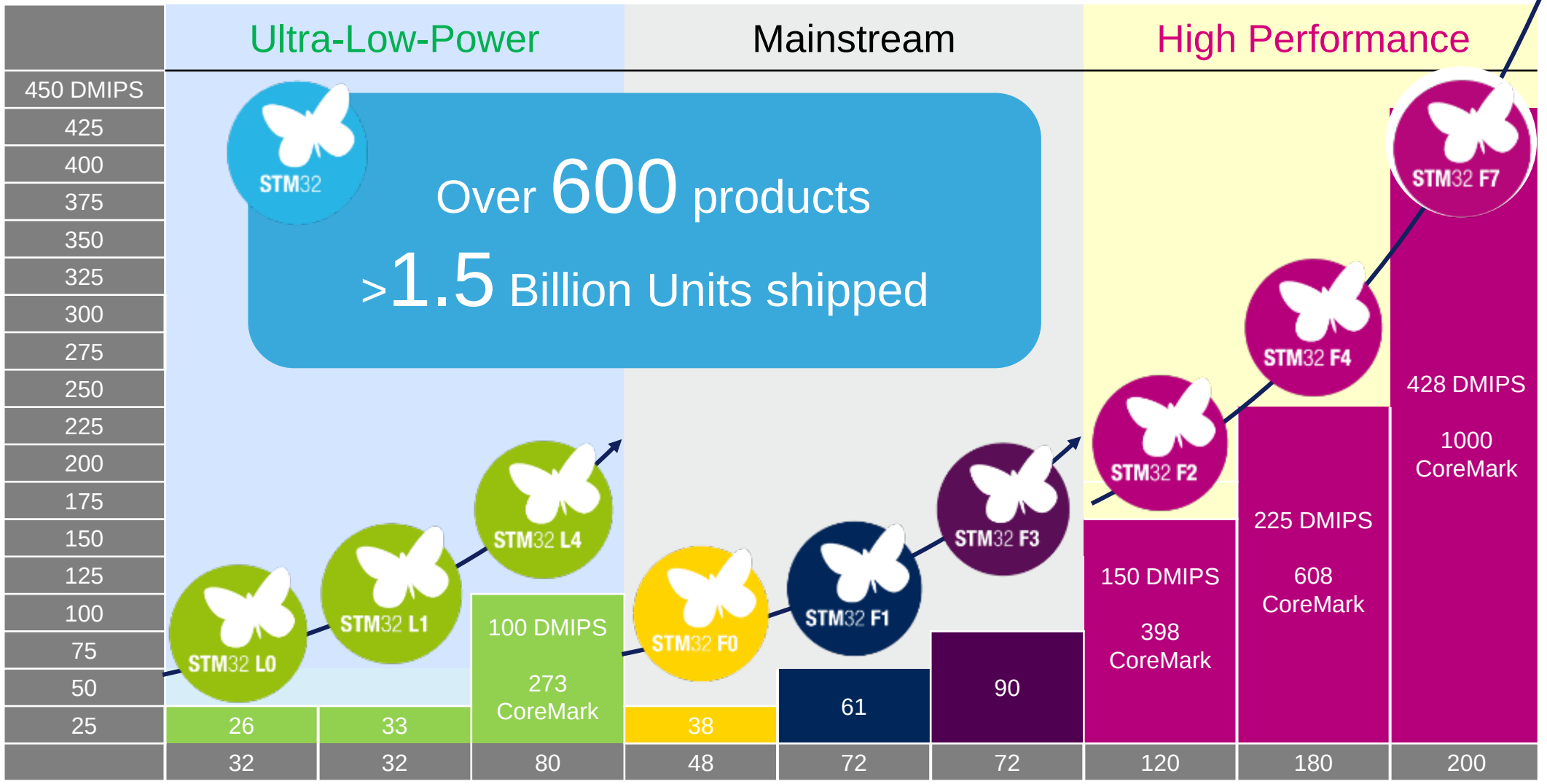
Versatile Embedded Processing Platform



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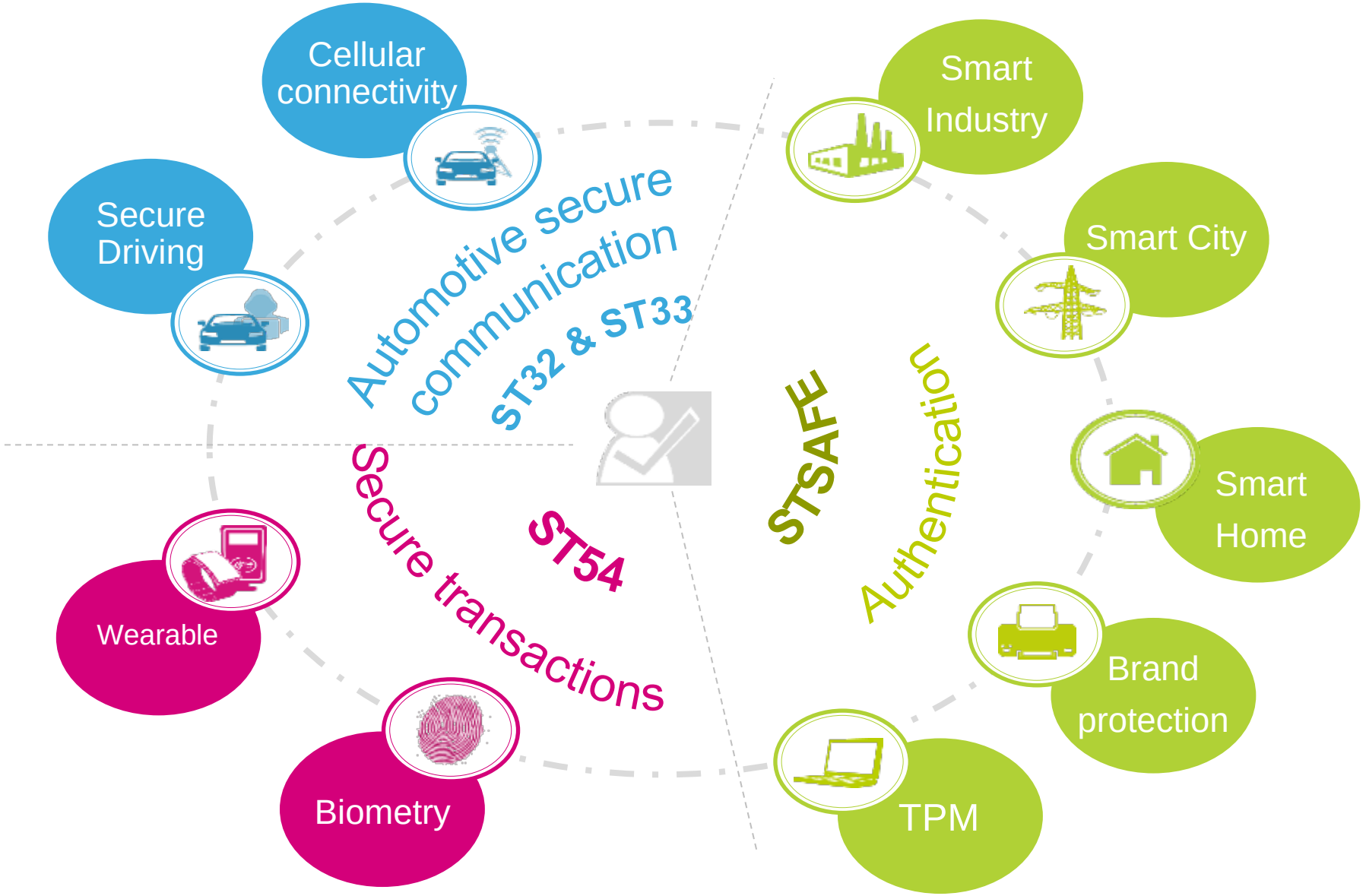
Secure Solutions for IoT



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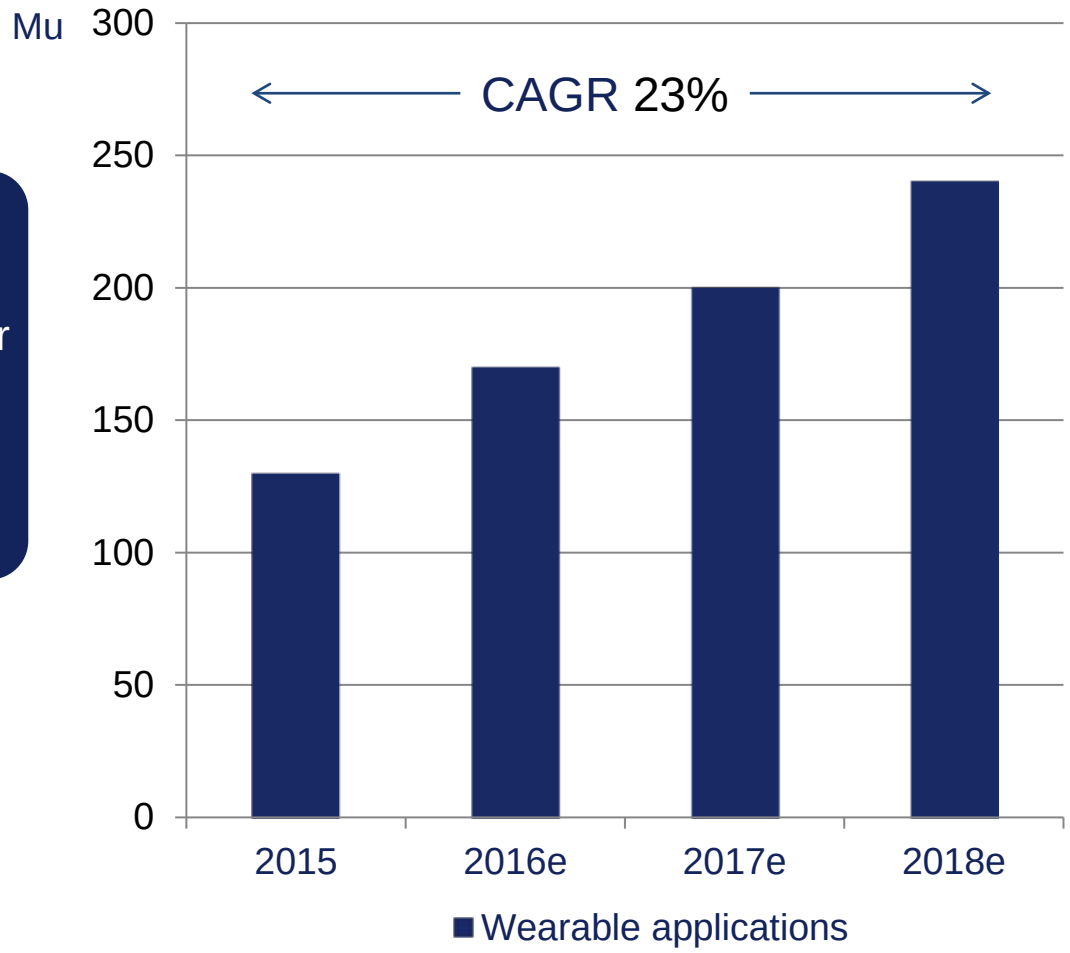
Wearable Market

The 1st wave of IoT products

- Growth linked to smartphone business
- Smart watches, fitness, smart glasses, health…

ST solutions

- Ultra-low power 32-bit MCU: Sensor hub, application processor
- Connectivity: Bluetooth Low Energy
- Security: Anti-counterfeiting & personal data protection
- Seamless development tool: STM32 Nucleo based



Source : ST, various sources including ABI

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Wearable & Secure Transactions

Wearable applications embedding secure transaction capabilities

Ultra-low-power 32-bit MCU application processor — STM32L series

Connectivity :

- Bluetooth Low Energy
- NFC controller

— ST21NFC series

Security: Secure Element — ST33 Platform

ST54

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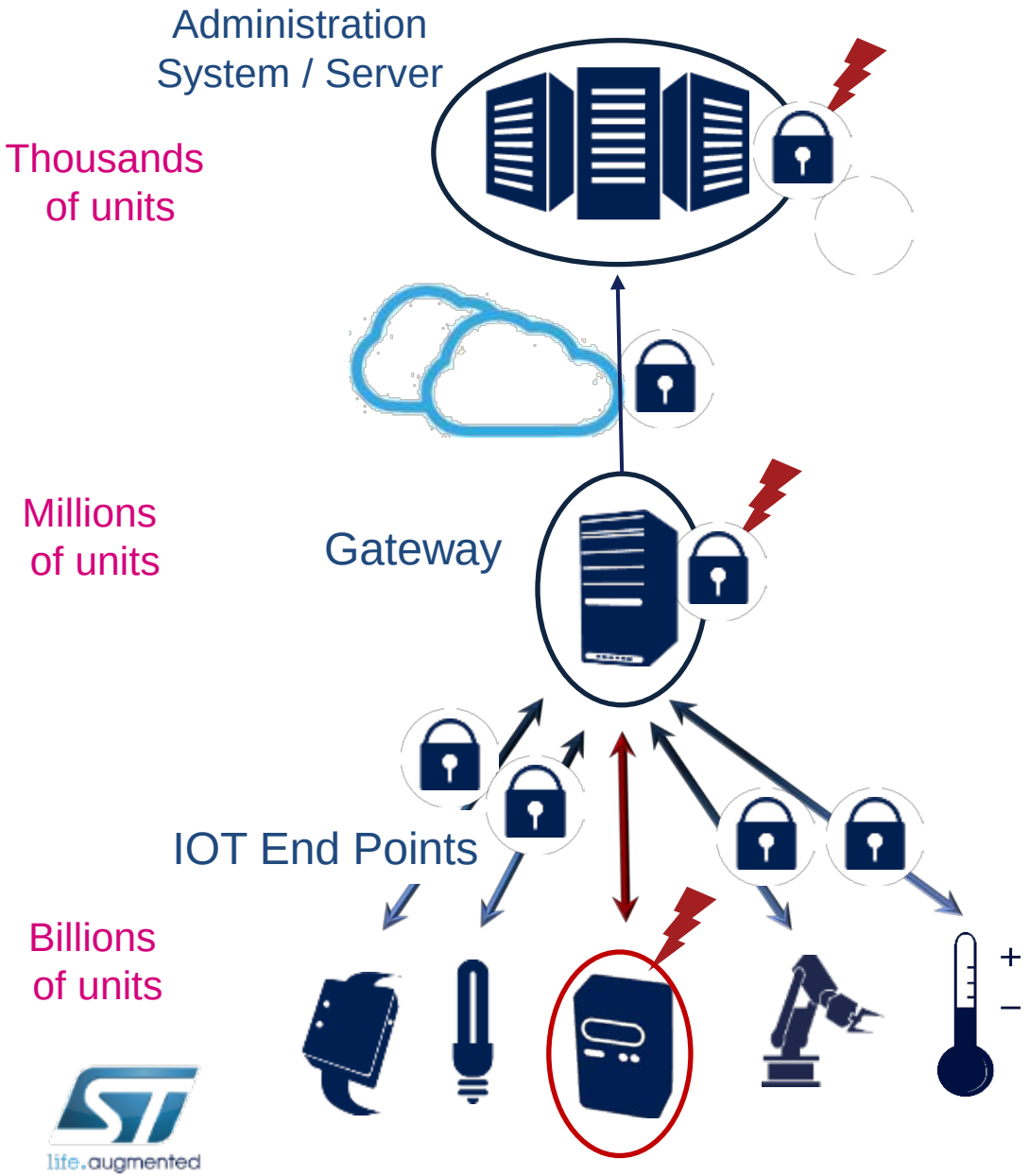
IoT Architecture

Managing risks



In order to prevent a node/object from perturbing the network, the node/object must be:

- **Trustable** (no fake objects)
  - Object must be **authenticated**
- **Not corrupted**
  - **Platform integrity** is guaranteed
- Respecting **privacy**
  - Data must be **encrypted**

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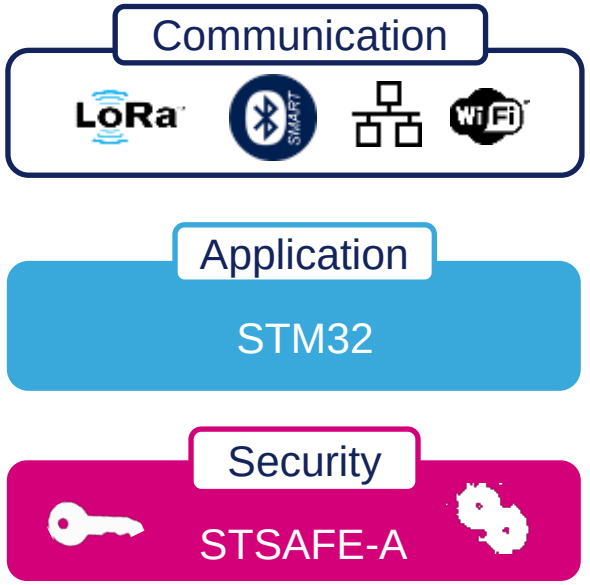
STSAFE-A: Trustable Security

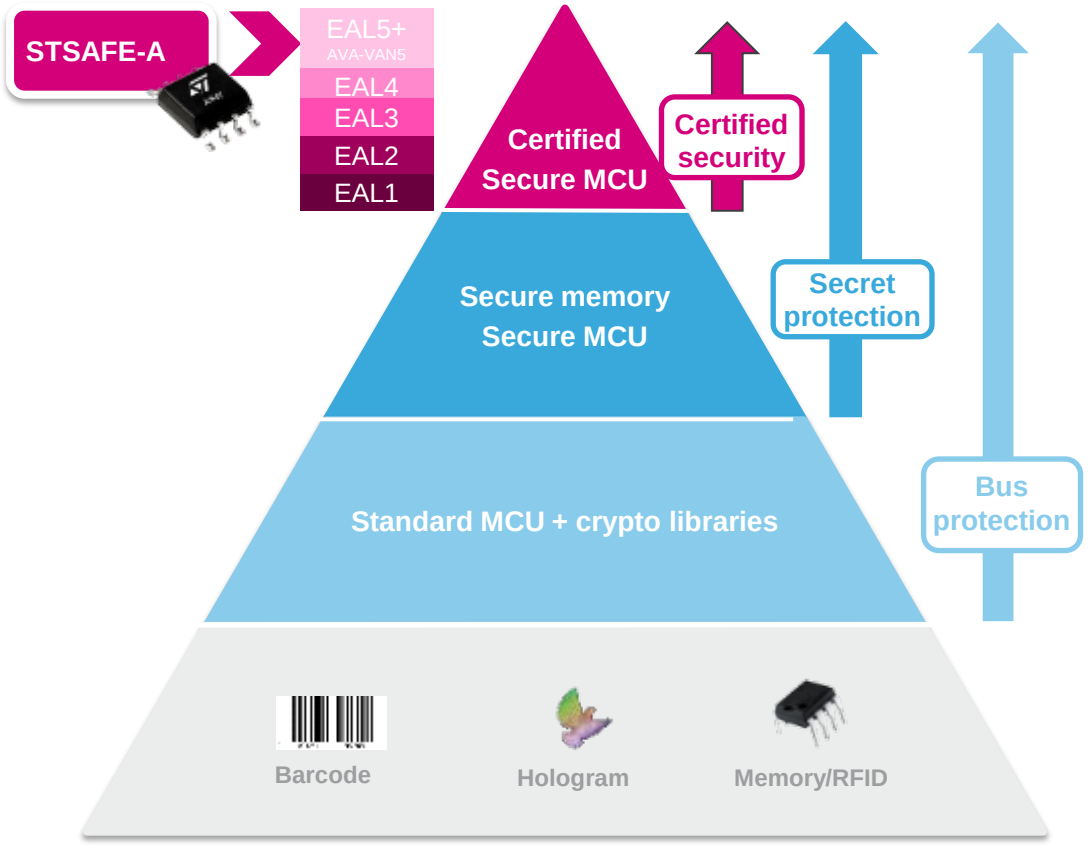
Fact-based security evaluated by independent third parties

STSAFE-A relies on a Common Criteria EAL5+ certified HW

Fact-based resistance to attacks

IoT application developers can trust STSAFE-A





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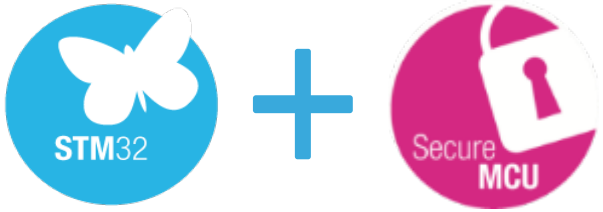
Scaling Security across IoT Market



Embedded Security

Tag ID 

Highest

Basic

Payment

Identification

Smart Grid, Industrial gateways

Healthcare

Smart meter

Appliances
Smart home

Wearables

Cost-effective resistance based on risk management for

- Asset protection
- Privacy
- Traceability

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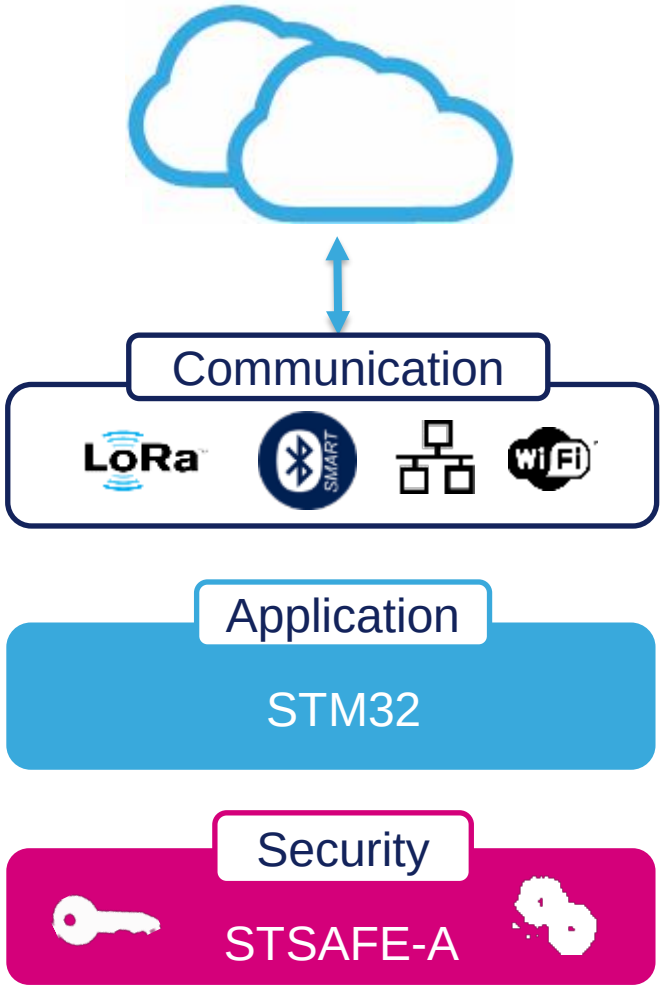
Secure Connection to the Cloud



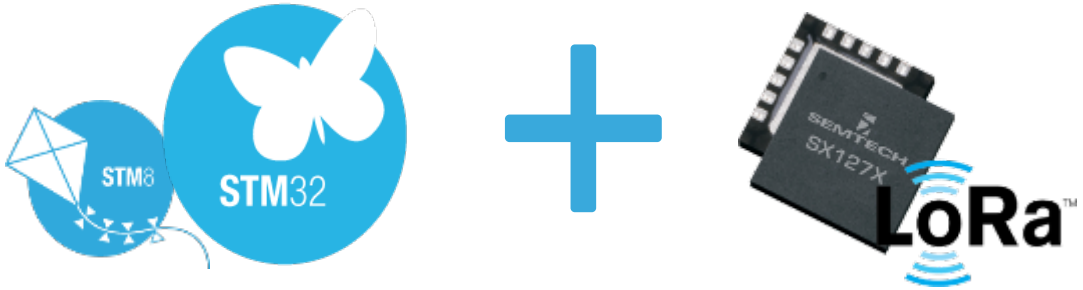
Connectivity

Versatile embedded platform

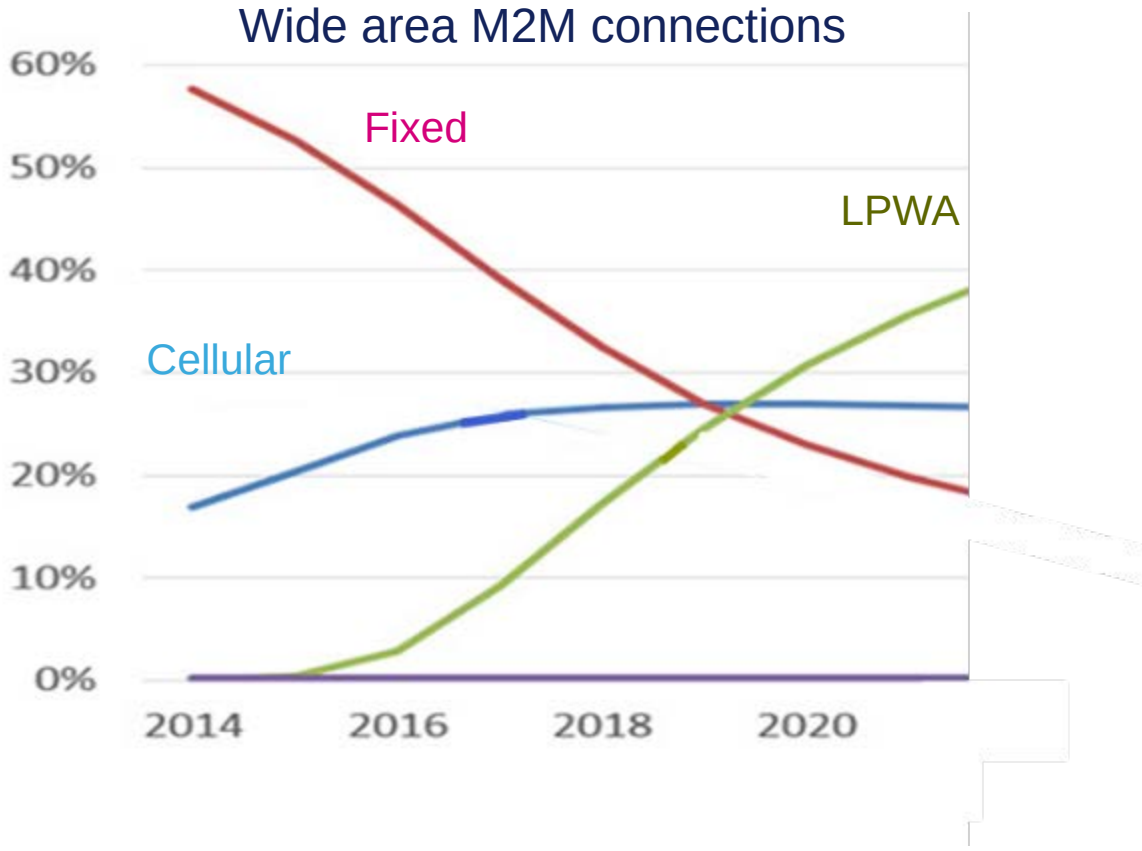
Security, privacy

STM32 + LoRa®

More than 4000 possible combinations



- **STM32, STM8** products available in more than **1000 references**
- LoRa® SX127x offers **4 different** lines



Source: Machina Research

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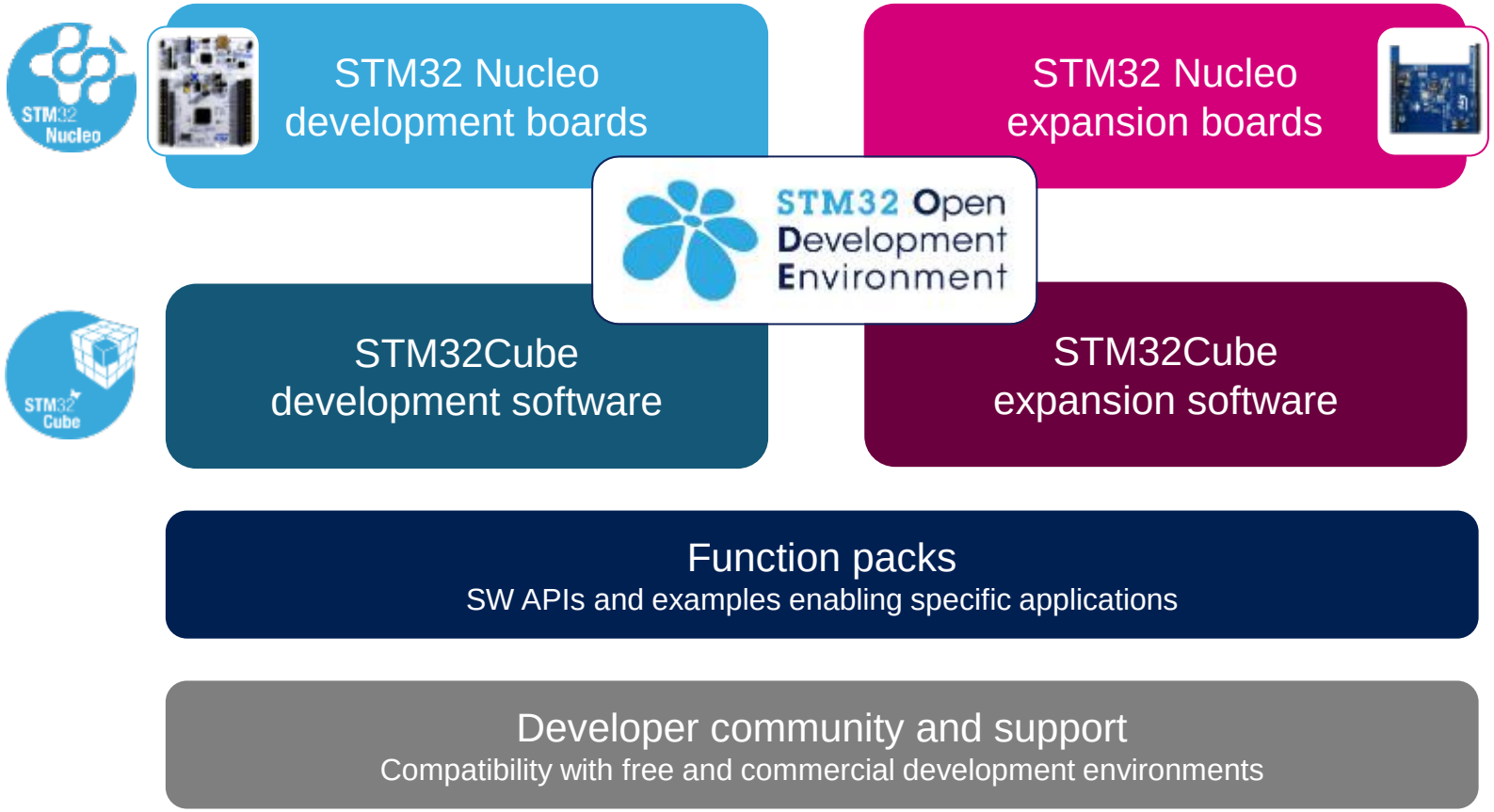
Selling the ST Portfolio together

The **STM32 Open Development Environment** is a flexible, easy and affordable way to develop innovative applications using ST components

Over 150K boards shipped in 2015



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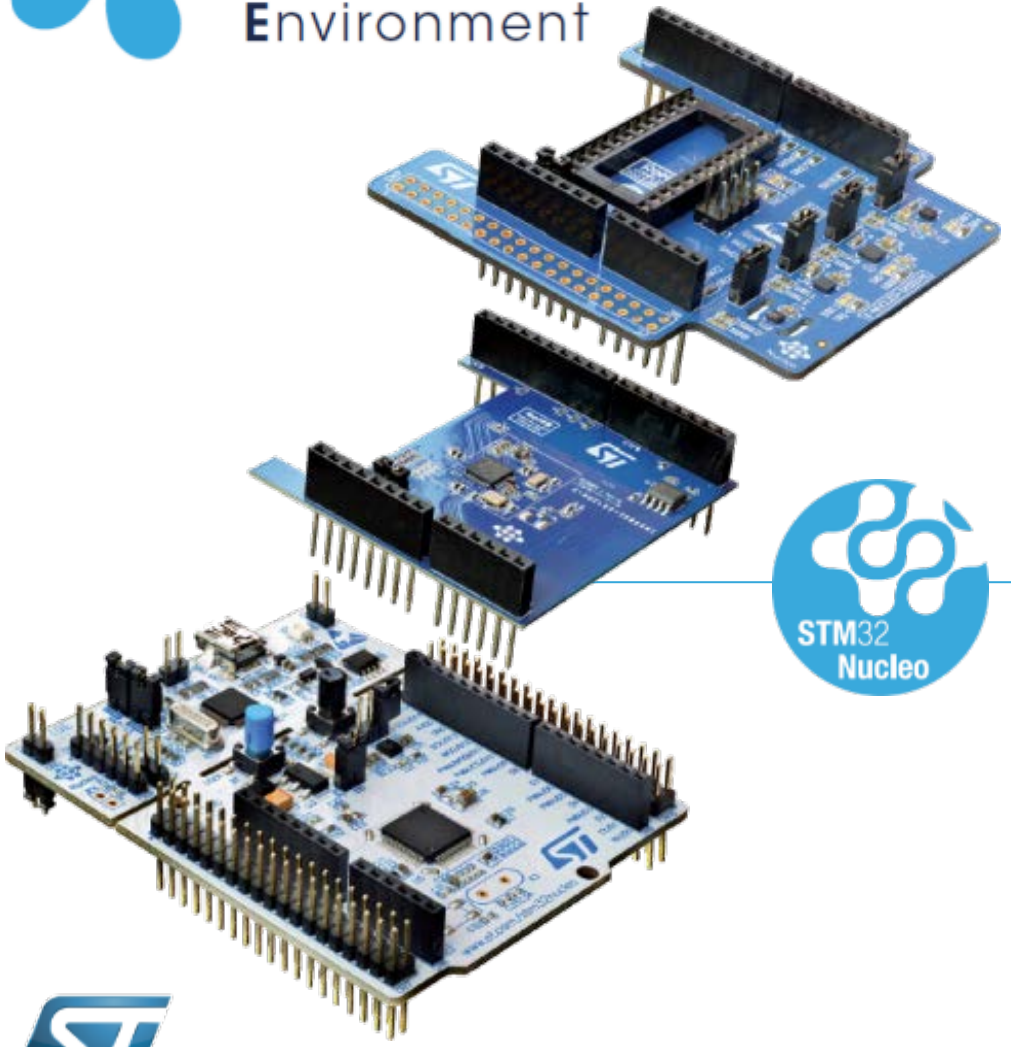
Going beyond

Fast, affordable development and prototyping

STM32 Open Development Environment



STM32 Nucleo

Sense
Motion &
environmental sensors
Proximity sensor
Microphone

Connect
BLE
Wi-Fi
Sub-GHz
NFC

Power Drive
Power management
LED Boost

Move Actuate
Motor drive
Actuator

Translate
Audio
OpAmp

STM32 Cube

Processing
STM32

Highest Security
Secure MCU

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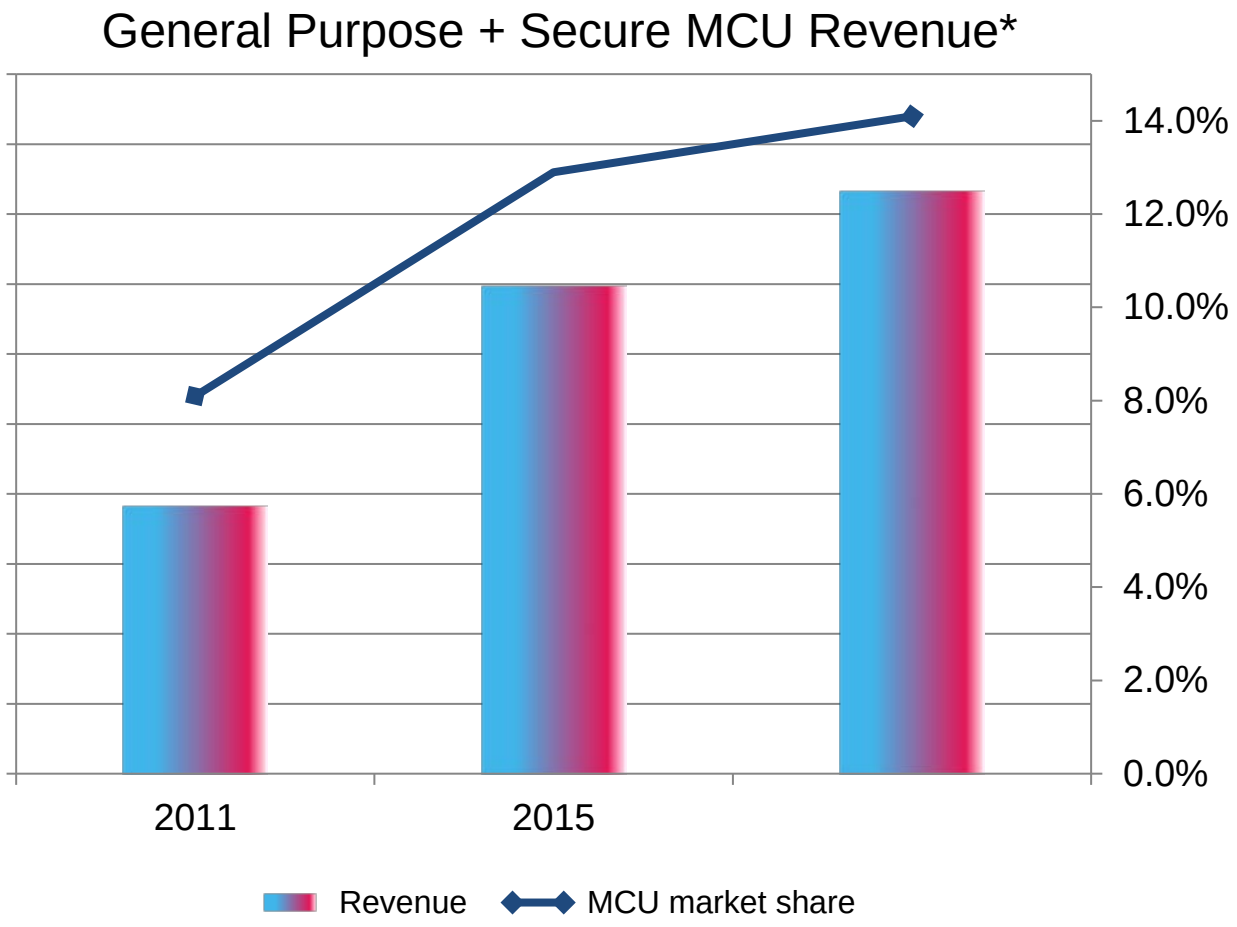
Takeaways



MCU share % vs TAM (Source: WSTS February 2016)

* Excluding Automotive MCUs

Pursue double-digit profitable growth and market share gain capitalizing on solid foundation

Maintain WW leadership :
- 32-bit General Purpose MCU
- 32-bit Secure Element

Reinforce & proliferate advanced connectivity solutions: Bluetooth Low Energy, LoRa, NFC…

Deploy easy to use & cost effective security solutions: authentication, trusted platforms…

Drive evolution of IoT market embedding more connectivity and security on top of GP MCUs
Targeting to become the #1 WW IoT player

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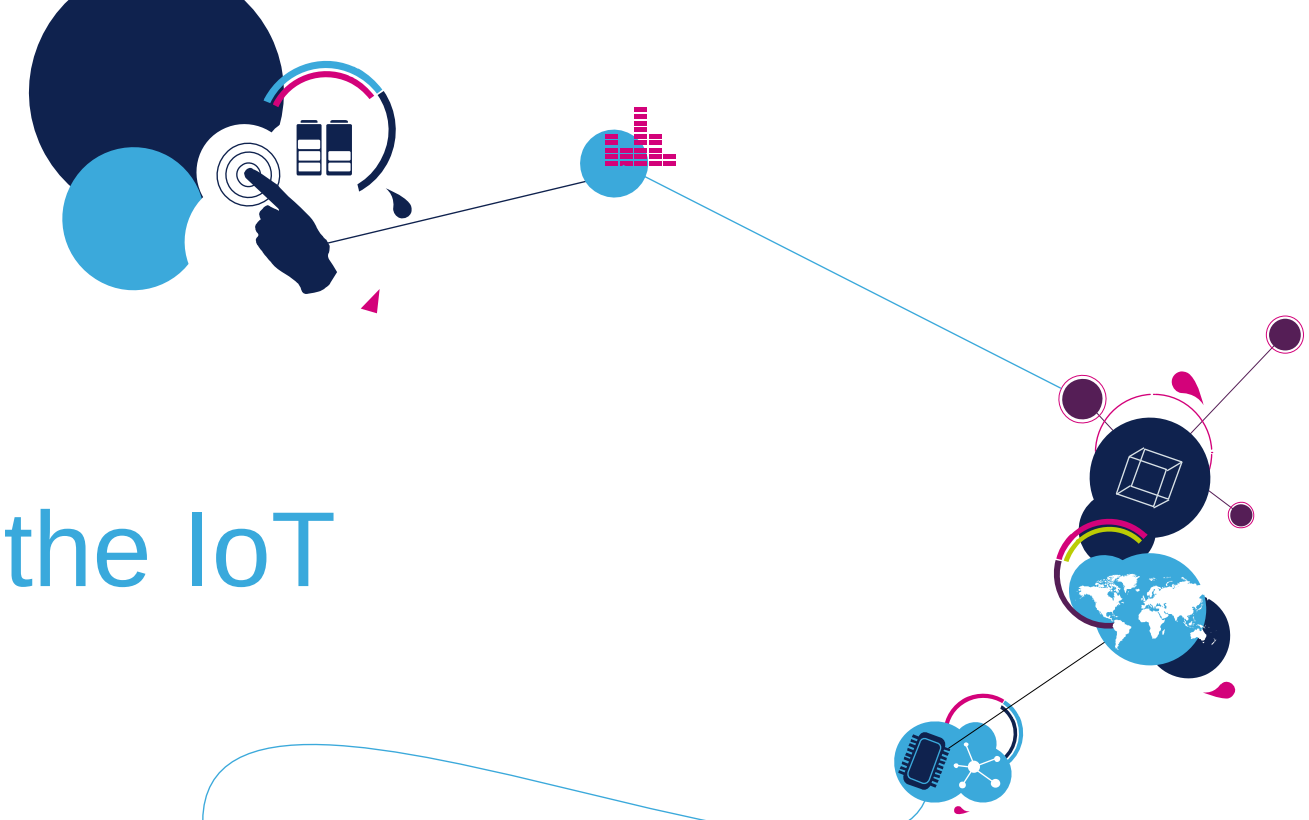

Meeting the needs of the IoT

Sensors, Analog, Power

Benedetto Vigna
Executive Vice President
General Manager, Analog and MEMS Group

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Motion MEMS in 2015

- Accelerometer
- Gyroscope
- Magnetometer
- 6-Axis & 9-Axis Inertial modules
- 6-Axis eCompass
- Optical Image Stabilization

iNEMO Ultra - LSM6DS3

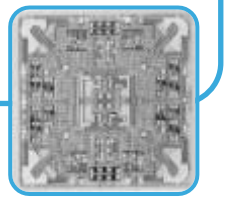
The 6X Ultra

- **Ultra** low power
- **Ultra** small size
- **Ultra** performing
- **Ultra** capable
- **Ultra** smart
- **Ultra** scalable

> 6 Billion motion MEMS shipped to date

Highlights

- Launched new industry leading 6-axis sensor with lowest power consumption
- 3rd generation Gyroscope for Optical Image Stabilization footprint <5mm2, thickness <0.7mm



"This is the first time that we see **a true 6X sensor** in an Apple product that doesn't require an external accelerometer." Chipworks

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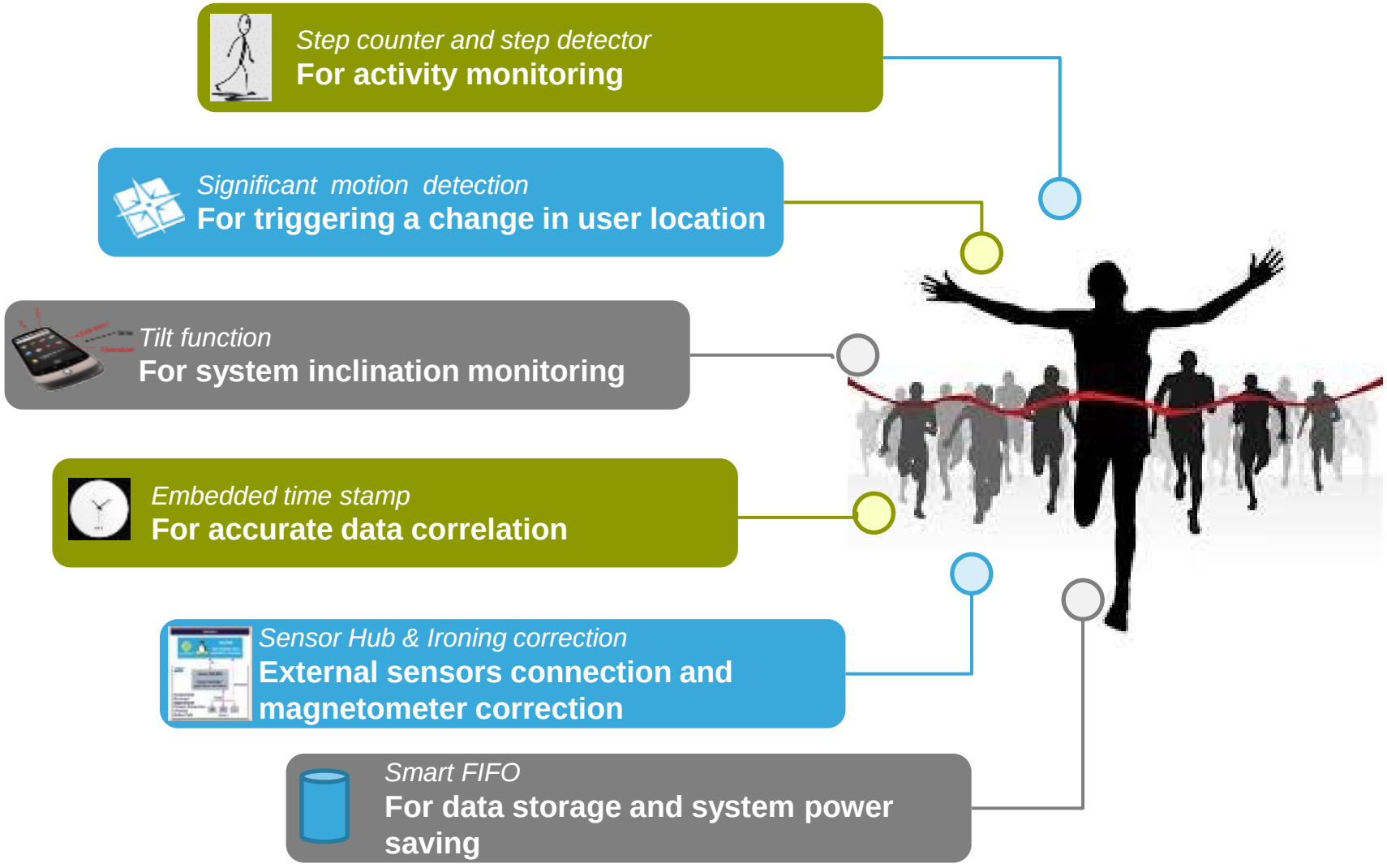
Software enhanced features focus in 2015

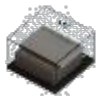


New Generation 6-axis MEMS IMU

Over 100M units sold

User Interface

LSM6DS3



2.5x3x0.86 mm

User Interface & Image Stabilization (OIS & EIS)

LSM6DS3H

2.5x3x0.86 mm

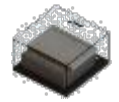
2015

50% Power reduction (<0.5mA)

2X improvement in Gyroscope noise

Pin and footprint compatible

LSM6DSL



2.5x3x0.86 mm

LSM6DSM

2.5x3x0.86 mm

2016

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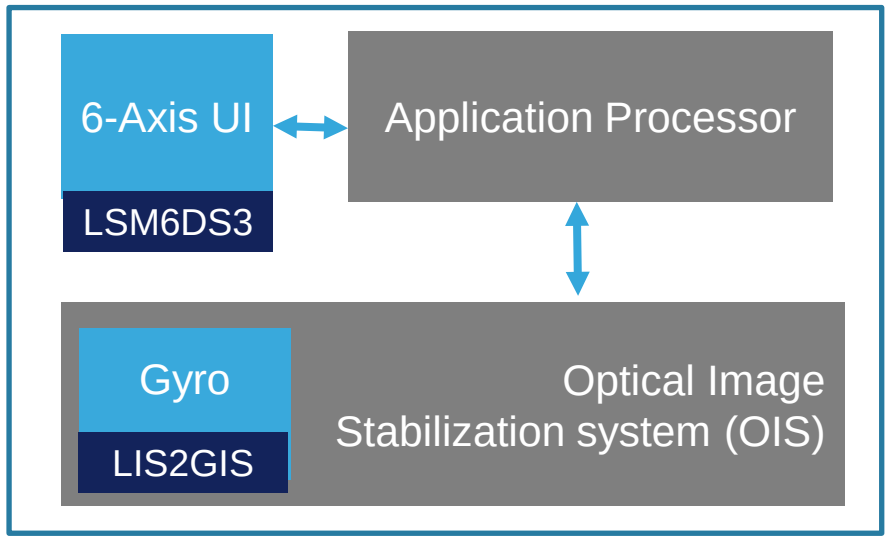
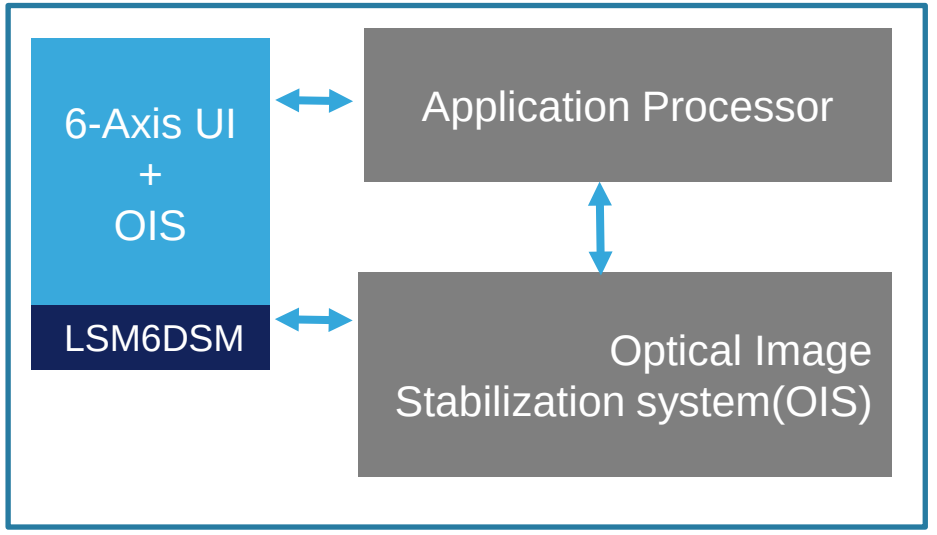
OIS System Architecture Support

Separate gyroscopes
for User Interface
& Image Stabilization



Ideal for pre-calibrated camera system

Common gyroscope
for User Interface
& Image Stabilization



Optimized for lowest power and highest integration

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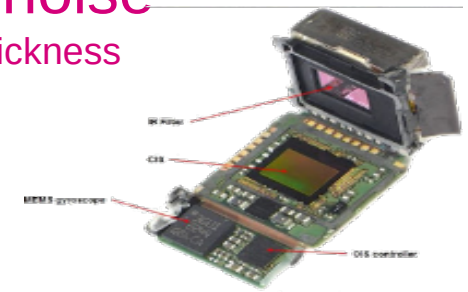
Motion MEMS Roadmap

Low-noise
low-thickness

Optical Image Stabilization (OIS) For Smartphones



New Market penetration
Cost effectiveness

Recreational & professional drones

Addressing existing and new applications and markets

Wearable

Ultra-low power
For always-on wearable devices

2015

Virtual Reality

High accuracy

2016

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Pedestrian Dead Reckoning

Offering a complete solution

Body placement detection

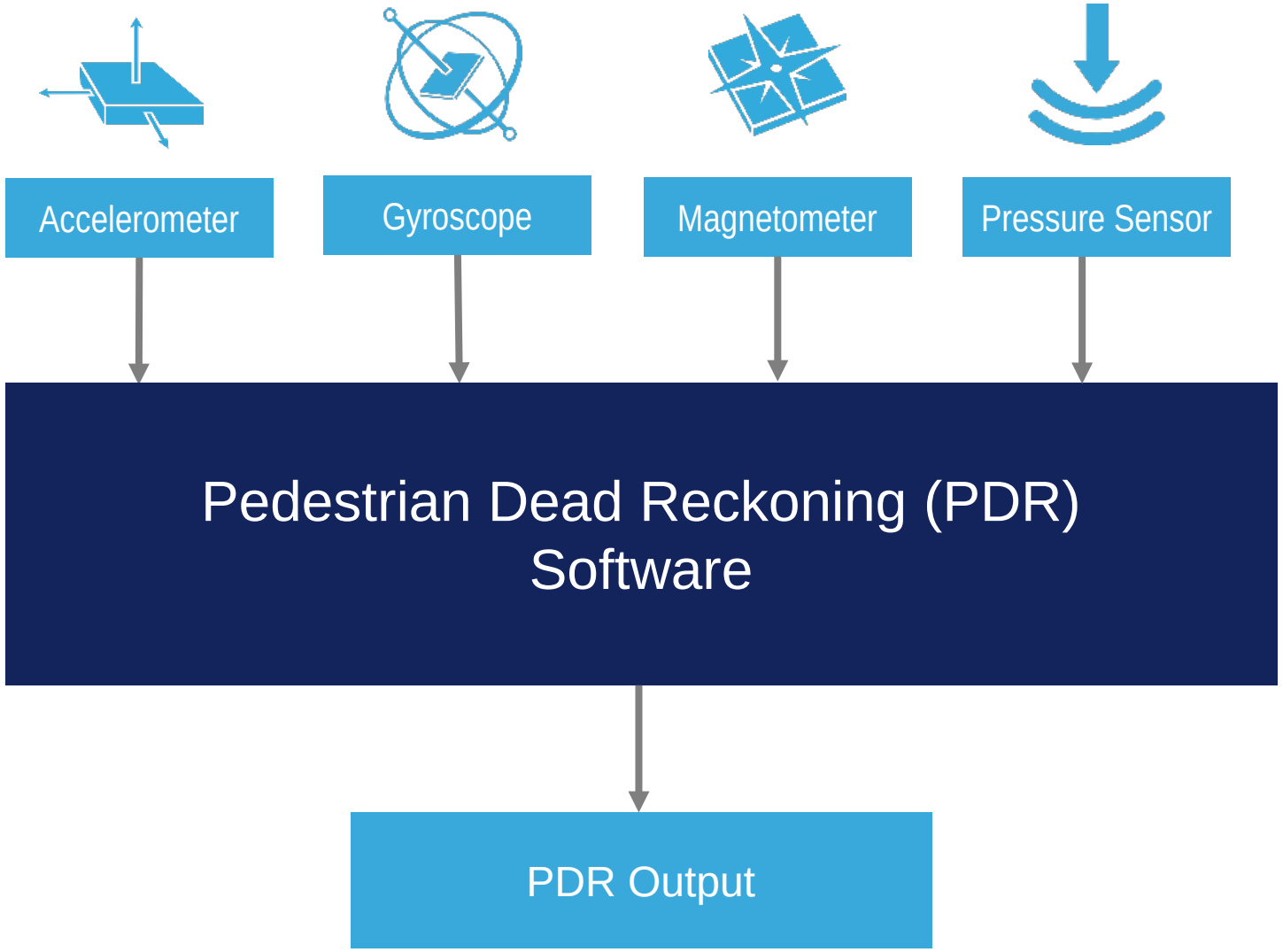
User activity mode detection

Step detection

Attitude filter

User walking direction determination

Position update logic



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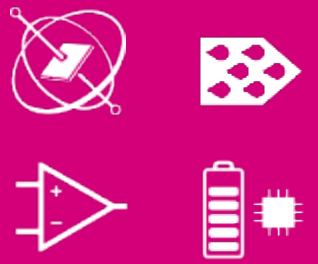
Diversification Strategy

New products

New products for traditional markets

New products for new markets

Traditional products for traditional markets



Traditional products in new markets for ST

New Markets

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Automotive MEMS

Strategy

Motion MEMS for Navigation & Telematics

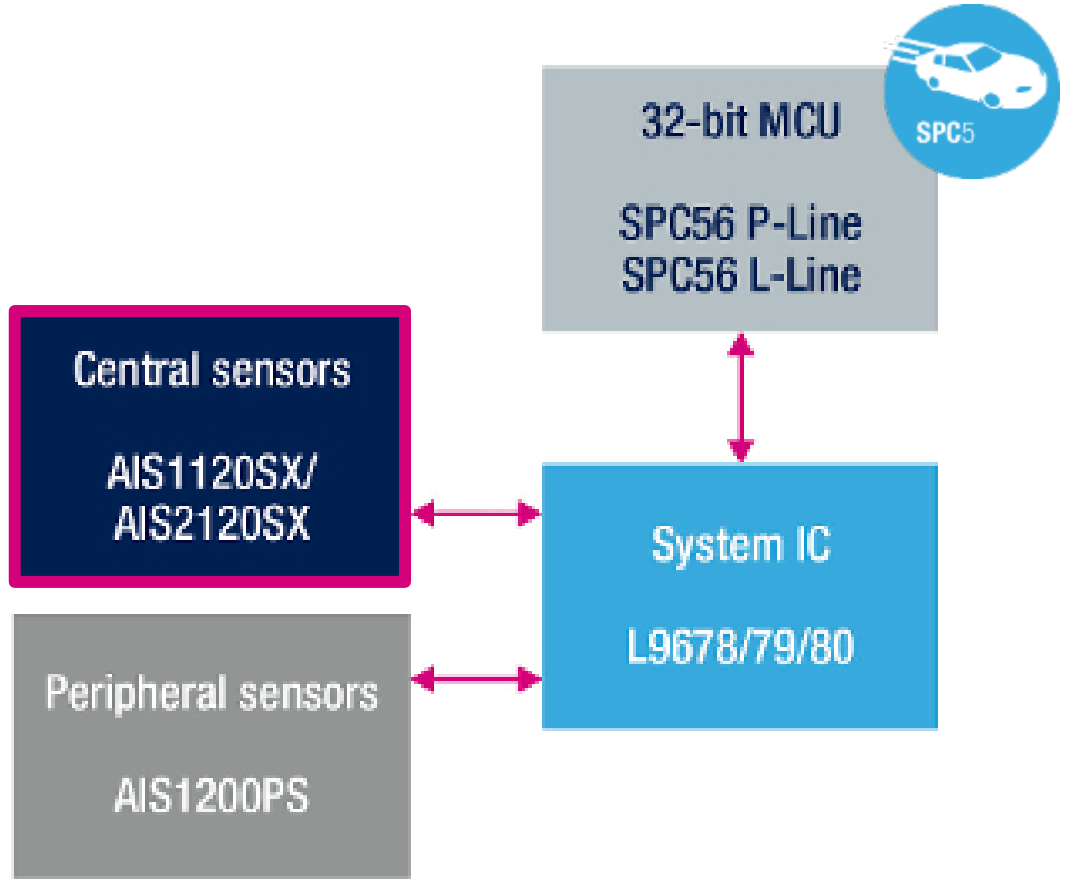
Step 1

- Number 1 today
- Expand customer base

Motion MEMS for **Passive** and **Active** Safety

Step 2

- Complete airbag-electronics kit with two new central-airbag crash sensors
- Further design wins for airbag applications



Airbag Electronics Kit

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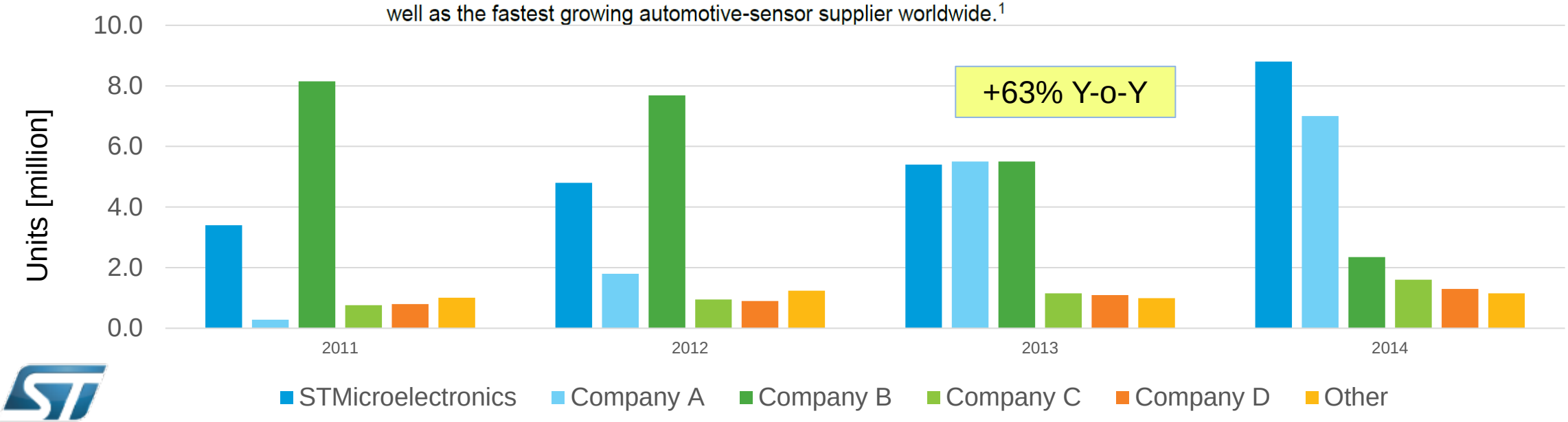
Press release

T3714D

STMicroelectronics Identified by IHS as Fastest Growing Automotive-Sensors Supplier

Geneva, November 10, 2015 – STMicroelectronics (NYSE: STM), a global semiconductor leader serving customers across the spectrum of electronics applications, has been recognized by IHS, the leading global source of information and analytics, as the leader in automotive sensors for navigation and telematics, as well as the fastest growing automotive-sensor supplier worldwide.[1]



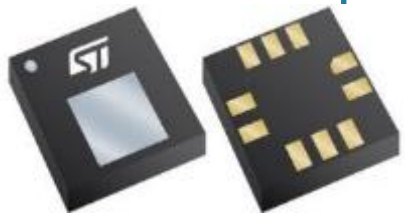
Source: IHS 2015

Environmental Sensors

Broadening the Portfolio

Pressure

- More than **100 million** Pressure sensors shipped in 2015
- Introduced world's smallest pressure sensor in tiny package (2x2x0.76mm)
- Applications
  - Altimeter
  - Indoor navigation
  - Weather station



UV

- World's first sensor to provide a direct digital output of the Ultraviolet Index (UVI)
- Now in a wearable device

Humidity Temperature

- Combined temperature & humidity sensor in smart home projects

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Touchscreen

FingerTip™ Touch-screen Controller

- Expanding customer base
- 3D touch solutions with **force sensing**
- Winning value proposition
  - **Lowest** power consumption
  - Very good high-end analog performance
- FingerTip technology well positioned to address wearable, security and active pen applications

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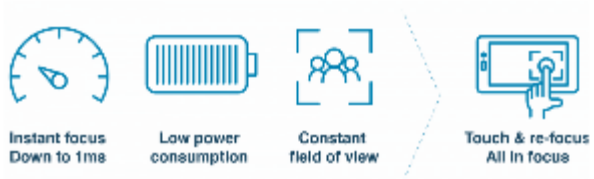
What we do with MEMS Micro-actuators

Micro-mirrors



Thin-film Piezo-electric MEMS

3D scanning

- In production with multiple OEMs for Intel RealSense™ Depth Camera
- Opportunities for other micro-mirror applications

Camera Autofocus

- Lower power consumption and higher speed versus Voice-Coil Motor (VCM) based solution
- Partnering with innovative lens maker PoLight for autofocus actuator in smartphones

Printing

High-speed inkjet print head for commercial and industrial applications

- High-viscosity materials
- Different printing materials

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MEMS Micro-actuator Offer

Piezo-Electric

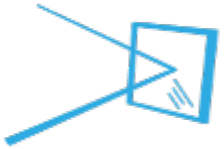
Camera autofocus
Inkjet print head

Thermal

Inkjet print head
Microfluidic MEMS

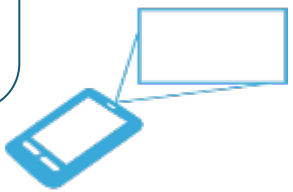
Electro-Static

Micro-mirrors
Touchless UI
Ultra-mobile projection



Electro-Magnetic

Micro-mirrors
Touchless UI
Ultra-mobile projection



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Micro-mirrors for Image Projection

HUD
Driver information

Image projection
Extending mobile displays

HMD
Wearable Devices

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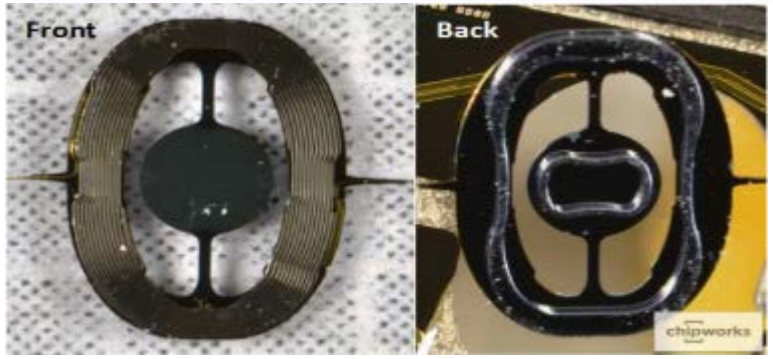
Small Portable Projectors

chipworks

PATENT INTELLIGENCE SERVICES

STMicroelectronics Micromirrors, Microvision, and Sony Bring Pico-Projection to the Pocket



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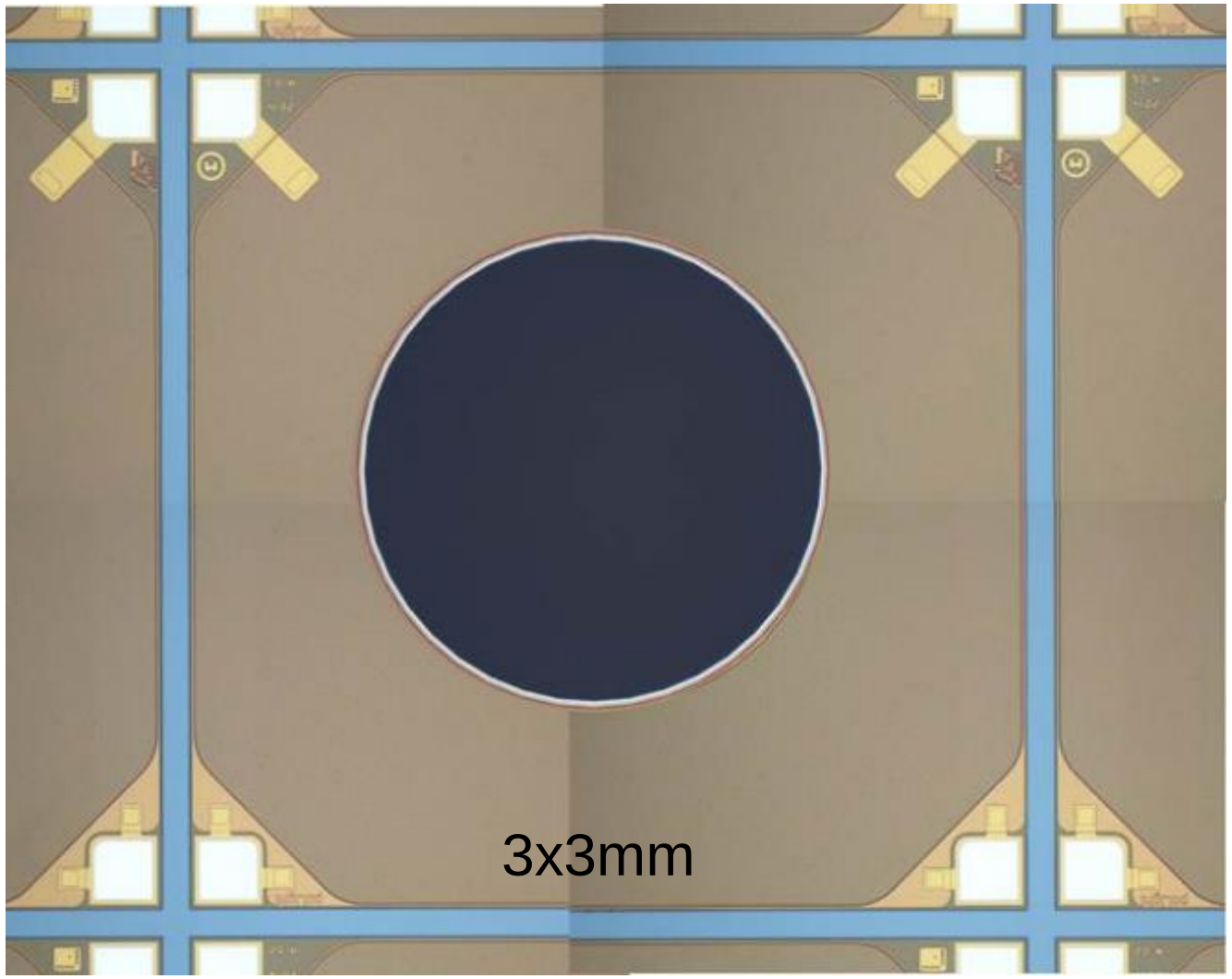
Piezo Micro-Actuator for AutoFocus

Jointly developed with PoLight



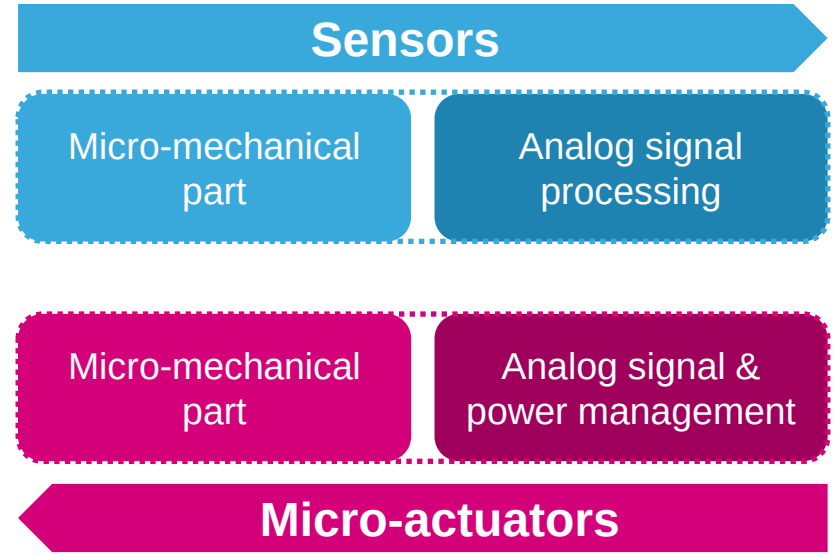
Building Micro-actuators

Micro-mechanics and analog

MEMS micro-actuators & MEMS sensors use the **same principles** and **same basic processes**

MEMS sensors have **ultra-low power analog** signal processing parts

MEMS micro-actuators have **high voltage/current analog** and **power management** parts
(since higher voltages required for some applications)



Leveraging our BCD technologies

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Analog & Power for IoT

Analog & Power - necessary for every IoT device

Analog & Power

Operational amplifiers
Large portfolio of high power-efficient op amps in tiny packages

AMOLED Display Power
High efficiency solutions for any display size

Current sensors
High accuracy current measurement for contactless battery chargers

Wireless Charging
Solutions for wireless charging applications requiring from 1 to 30 Watts

Audio amplifiers
High-efficiency Class D and G amplifiers for headsets and speakers

Motor Control
Solutions for applications requiring from 1 to 30 Watts

Actuator Drivers
Driver ICs for piezo-electric actuators

Analog switches
Compact single and dual switches for audio and USB

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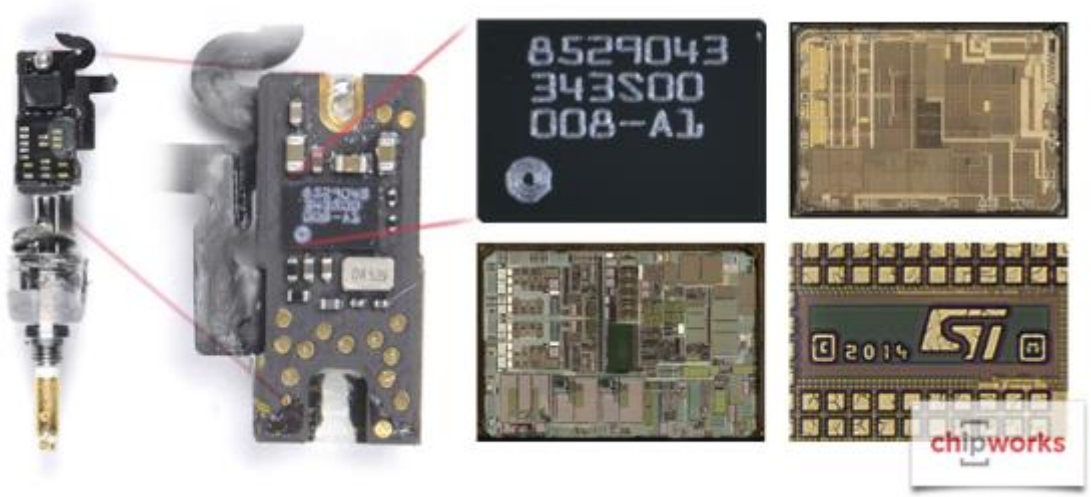
Analog Functions needed Everywhere



"After a little device de-processing we learned that the driver IC inside the tip of the pencil is designed and fabricated by STMicroelectronics."

http://www.chipworks.com/about-chipworks/overview/blog/the-apple-pencil-a-lot-of-semiconductor-content-something-so-small

Enabling the Wireless Power World

30 W
Laptops

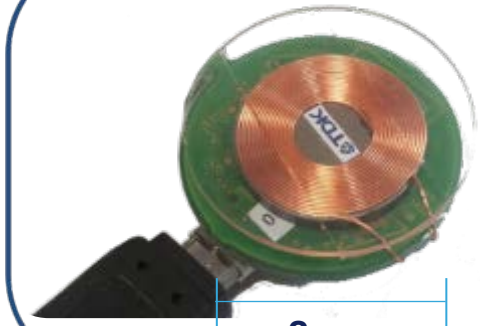
15 W
Consumer

5 W
Automotive

1 W
Wearable

Solution for Wearable

Transmitter



2 cm

1 cm

Receiver

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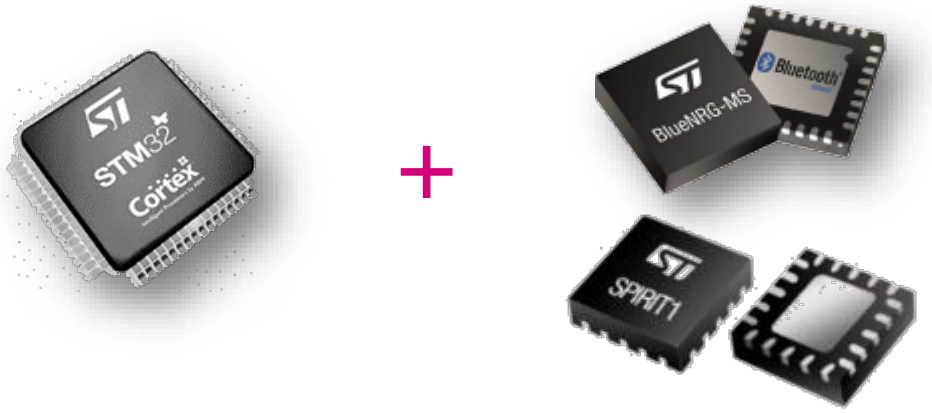
Short-range and wide-area network processors

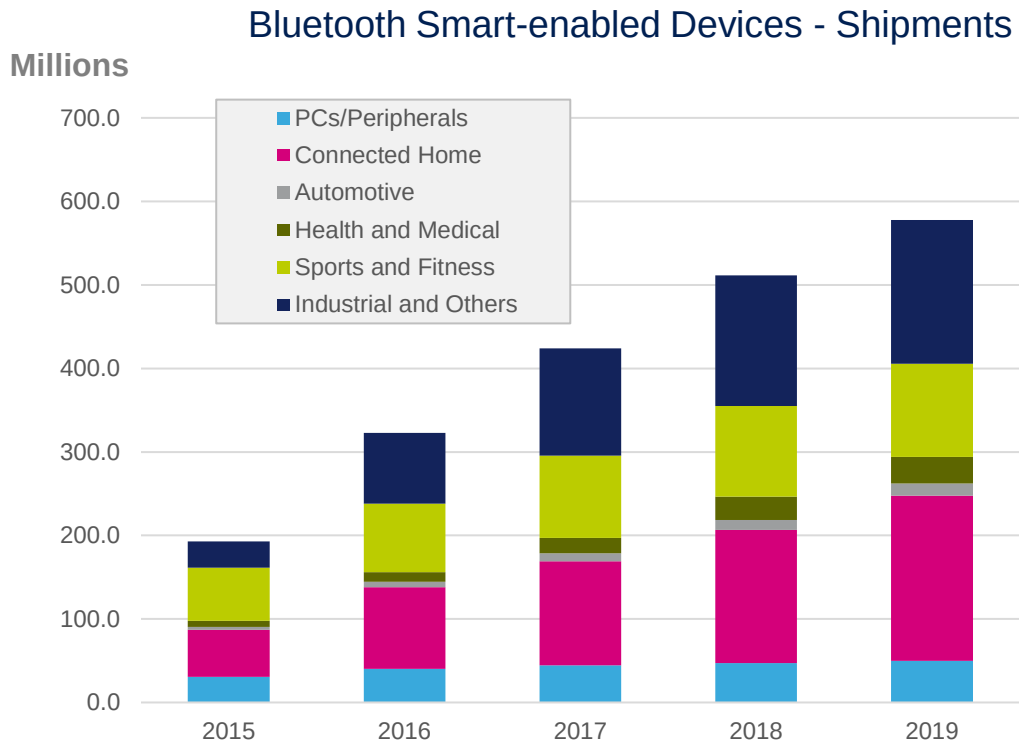
BlueNRG

- Highly energy-efficient Bluetooth Smart network processor

SPIRIT

- Very low power RF transceiver for SubGHz license-free ISM and SRD bands





Source: ABI

Offering more than Hardware

Open Software expansion libraries

Motion & Gesture

- Gesture Recognition
- Carry Position Determination
- Activity Recognition
- Pedestrian Dead Reckoning

Audio

- Acoustic Echo Cancellation
- Sound Source Localization
- Voice & Music over Bluetooth Smart
- Beam Forming

RF

- Bluetooth Low Energy
- 6LowPAN

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Takeaways

- Pushing product performance and expanding applications in Motion MEMS
  - Automotive, Drones, Virtual Reality, …
- Expanding offer with new Sensors and Micro-actuators
  - Partnerships with big players and startups
- ST provides all technologies enabling IoT applications, beyond MEMS
  - Analog and efficient power solutions
  - Short-range, wide-area connectivity network processors

Smart Connected Driving

Marco Monti
Executive Vice President,
General Manager, Automotive and Discrete Group

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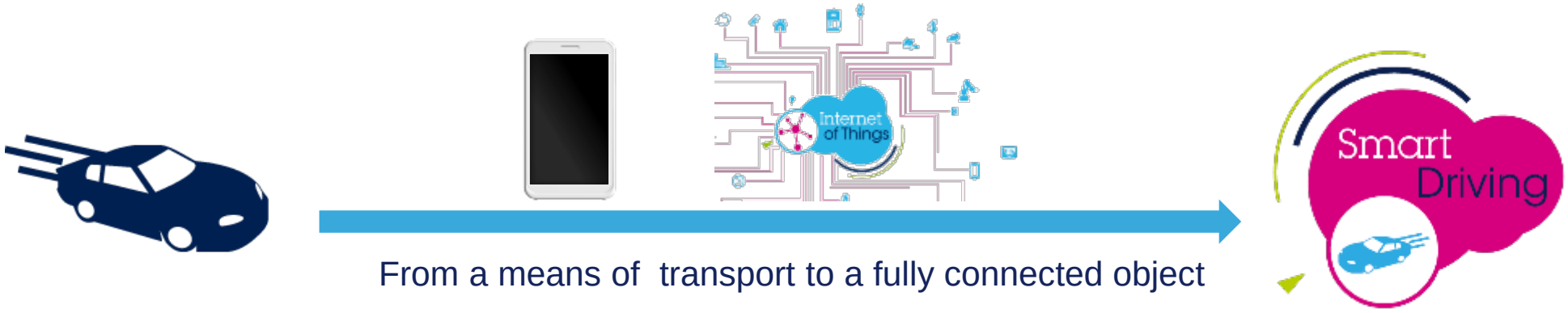
Internet of Things has changed Automotive

Smartphones and broadband connectivity have transformed Automotive, adding advanced services for both driver and passenger for a safer and fascinating driving experience.



From a means of transport to a fully connected object

Traditional Automotive

- Car conceived purely as a means of transportation
- Emphasis on mechanical content
- Isolated object
- Entertainment restricted to the car radio
- No phone integration
- Data Streaming linked to navigation

Connectivity

Smart Driving

- Car conceived with complete user experience in mind
- Innovation driven by electrical & electronic content
- Extensive Connectivity & Communication functions
- Huge Data processing capabilities
- Smartphone integration and remote control

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Cars & Smartphones

Closer and Mutually Dependent

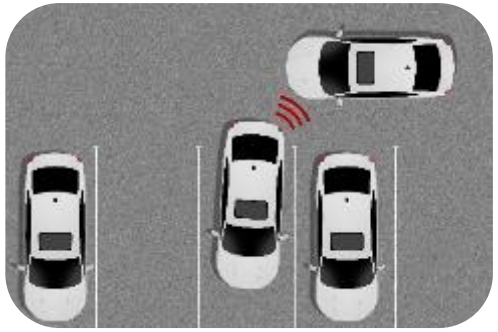
Permanently connected to the cloud

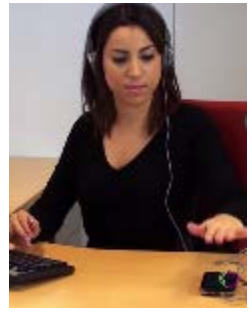
Strong dependancy on screens with graphics capabilities

Over the air Software update

Smartphone remotely monitoring the car

Sensing and man/machine interface





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Smart Driving

Core Connected Applications

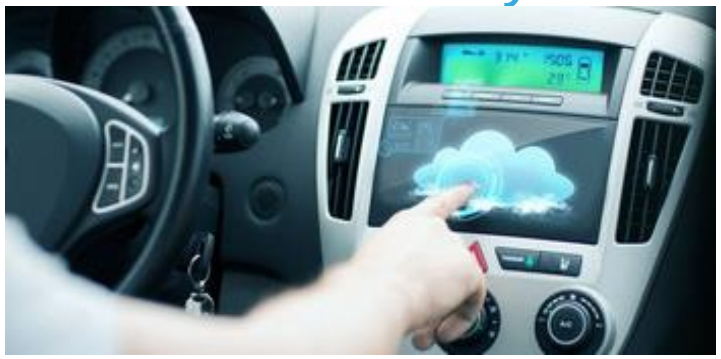
ADAS and Active Safety

Autonomous Driving
Assisted Driving
Park Pilot
Pedestrian Detection

Infotainment

Entertainment
User Services

Connectivity



V2X
Insurance Box
E-Call
Remote Car Monitor
Remote SW upgrade

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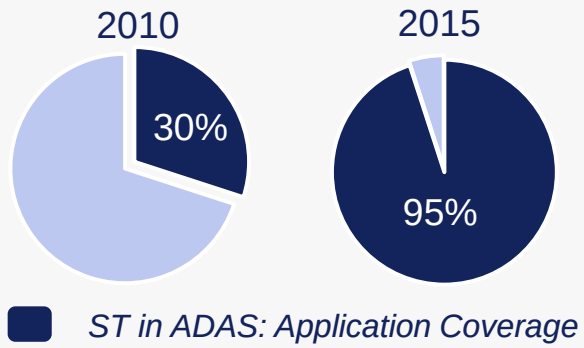
ST in ADAS Applications

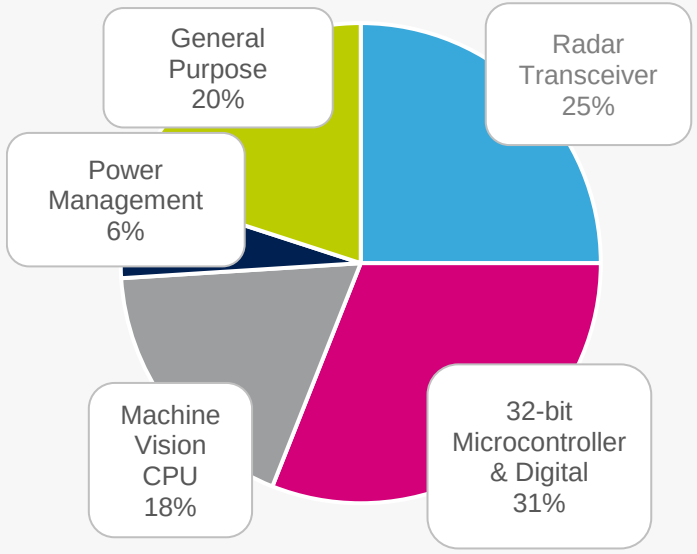
Wide product portfolio addressing all techologies



ST in ADAS: Application Coverage

2015 ADAS Safety

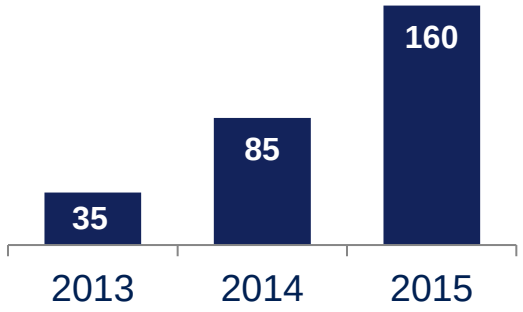
TAM ~$550M (*) (**)



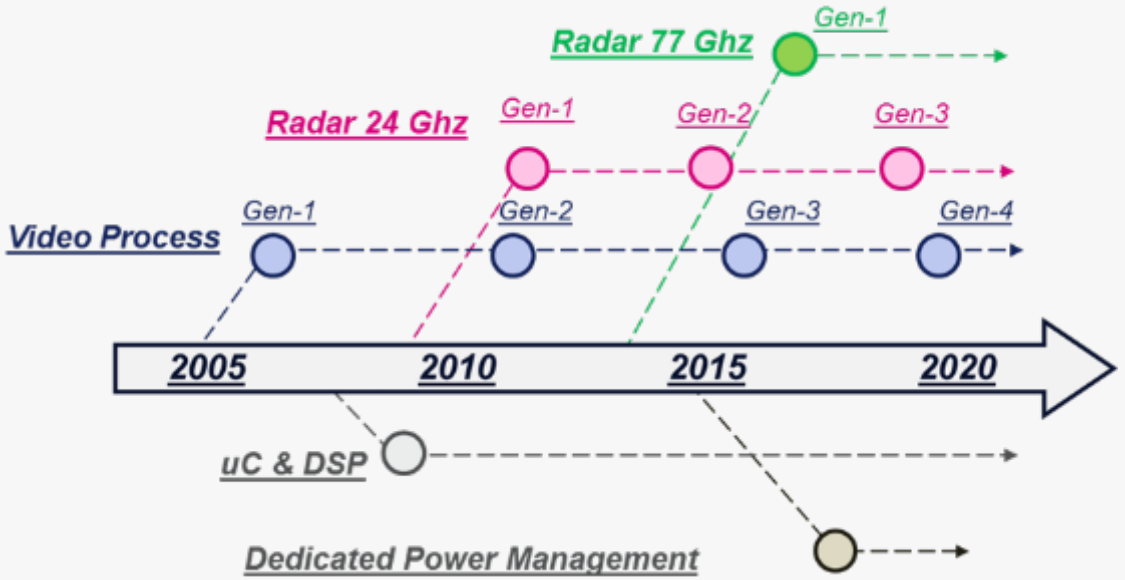
#1 in ADAS

29% ADAS market share in 2015

ST Sales in ADAS (M$)



Continuously evolving Portfolio Roadmap



(*) Core apps: Forward collision warning, lane departure warning, pedestrian detection, adaptive cruise control, blind-spot detection
(**) TAM excludes camera, memories and optoelectronics

Source: Strategy Analytics, ST

Market Leader in Machine Vision ADAS

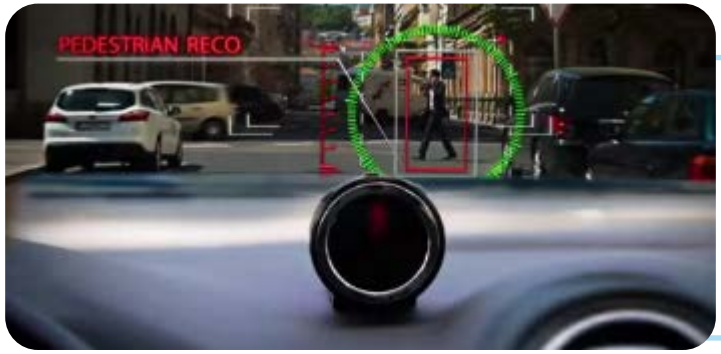
Partnership with Mobileye

68%

2015 ADAS Vision market share

270 car models equipped

Assisted Driving



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MOBILEYE

Evolving partnership

Autonomous Driving

Vision Processing Power

EyeQ1 — x3 — EyeQ2 — X6 — EyeQ3 — x8 — EyeQ4 FD-SOI

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(*) Core apps: Forward collision warning, lane departure warning, pedestrian detection, adaptive cruise control, blind-spot detection

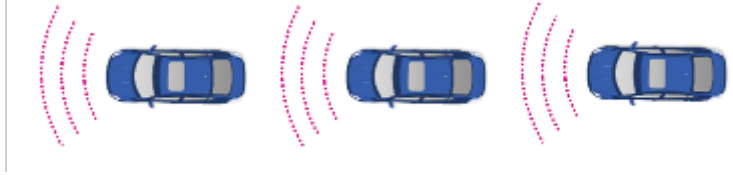
Radar: Beyond Vision-Processing in ADAS

ST solid leadership in RADAR system

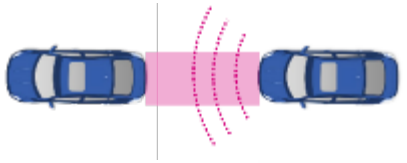
Estimated Market Share Evolution with business already won

Radar System Components	2015	2020
Short Range Radar (24 GHz) TAM $150M (*)	60 %	→
Long/Short Range Radar (77 GHz) TAM $180M (*)	4 %	Mid teen
Microcontroller & DSP TAM $600M (*)	3 %	Mid teen
Power Management TAM $80M (*)	7 %	Mid teen

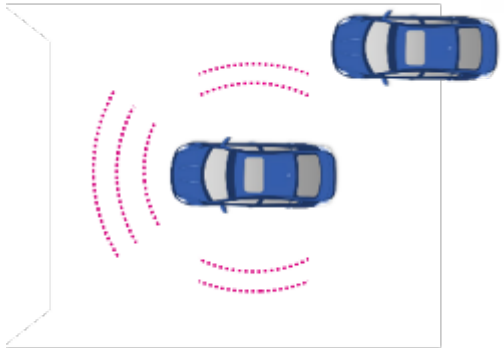
Adaptive Cruise Control



Collision Warning



Blind Spot Detection



24/77 GHz Radar System

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(*) Estimated Market size in 2020 – Strategy Analytics , ST

More Connected

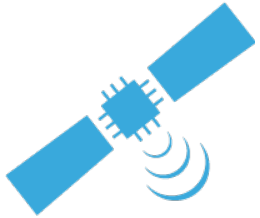
Additional $700M opportunity by 2020(*)

Wi-Fi

- Internet Hot-Spot
- Access to the cloud
- Car-to-Car Communications
- Car-to-Infrastructure Communications

Satellite

- Navigation
- ADAS through precise positioning
- Satellite data stream



Terrestrial Broadcast

- Digital tuner audio and data stream: Multi Standard Digital Radio Receiver

Cellular

- Smart Phone Replication
- Emergency Call
- Insurance Box
- Infotainment & Internet Access

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(*) 2020 market for Ecall + Telematics box + V2X (ST estimate)

More Connected

Additional $700M opportunity by 2020(*)

Wi-Fi

Car-to-X: Craton2 with Autotalks

- Single chip Automotive Wi-Fi Processor
- V2X and Internet Hot-Spot
- Remote SW updates ready
- Enabling cloud connectivity
- Awards from 3 major car makers targeting >50% of installed base by 2020

Terrestrial

- Market leader
- Digital tuner audio and data stream: Multi Standard Digital Radio Receiver

20% market share 2015

Satellite

Navigation: Teseo III

45% market share 2015

- 3rd Generation in production
- Multi-constellation, Beidu-2 ready

ADAS: Teseo-P

- Sub-meter precision for ADAS

Satellite data stream

- SiriusXM Partnership
- FD-SOI for low-quiescent current

Cellular

Emergency Call / Insurance-Box:TELEMACO

>50% market share 2015

- Multi-core ARM processor

Infotainment & Internet Access: Accordo 5

- Android Auto & Car-Play ready
- Enabling cloud connectivity

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(*) 2020 market for Ecall + Telematics box + V2X (ST internal data)

Connected Car Opportunity

Secure communications

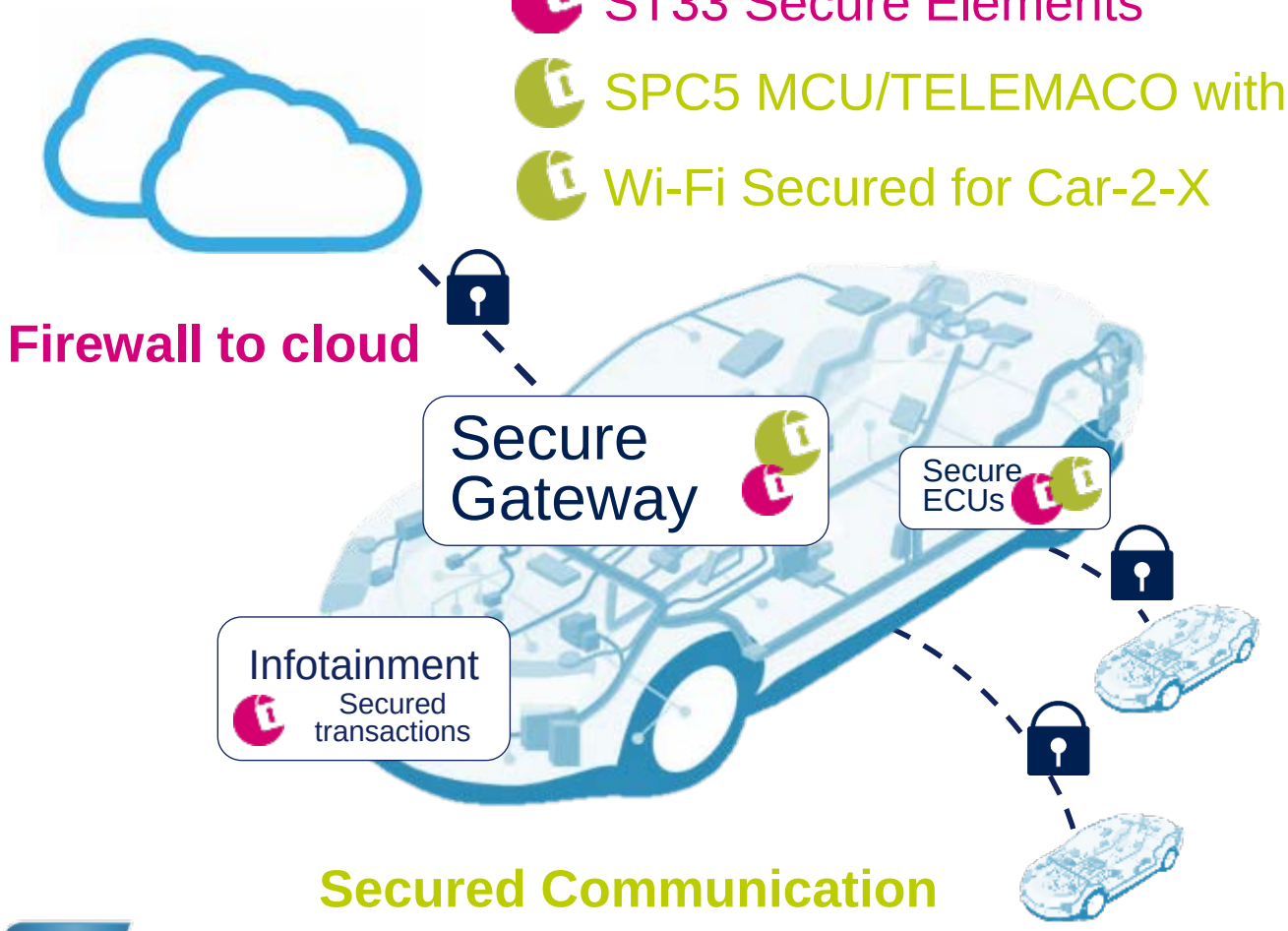
More Connected and More Secure

End-to-end secured product portfolio

ST33 Secure Elements

SPC5 MCU/TELEMACO with Crypto

Wi-Fi Secured for Car-2-X

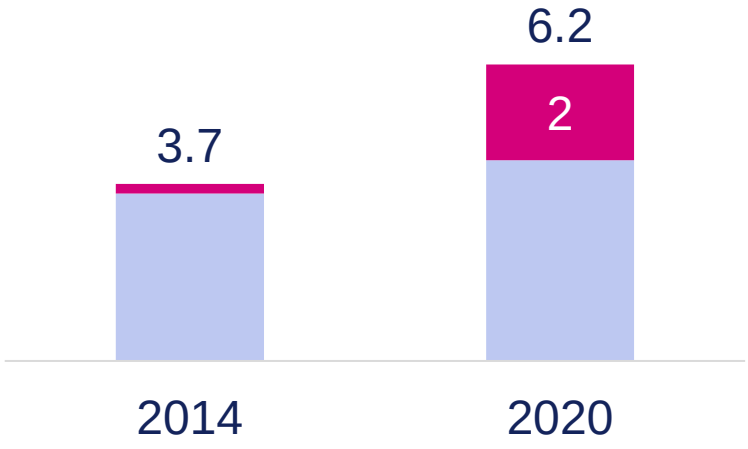


Security in Automotive needs two levels of protection

1st Level: Authentication & secured connection with the external world

2nd Level: Data integrity and secured communication inside the car and in the car sub-systems

> $2B with security functions in 2020



32-bit automotive microcontrollers with security on board vs total microcontrollers (in $B)

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The Foundations of Smart Driving

30 years in automotive

#1	#1	#1	#1	#1	#1	#2
Braking	Engine Control	Smart Power	ADAS	Passive Safety	Car Audio	Infotainment

APG Revenues In 2015

$1.7B

2015 Market Share

13%

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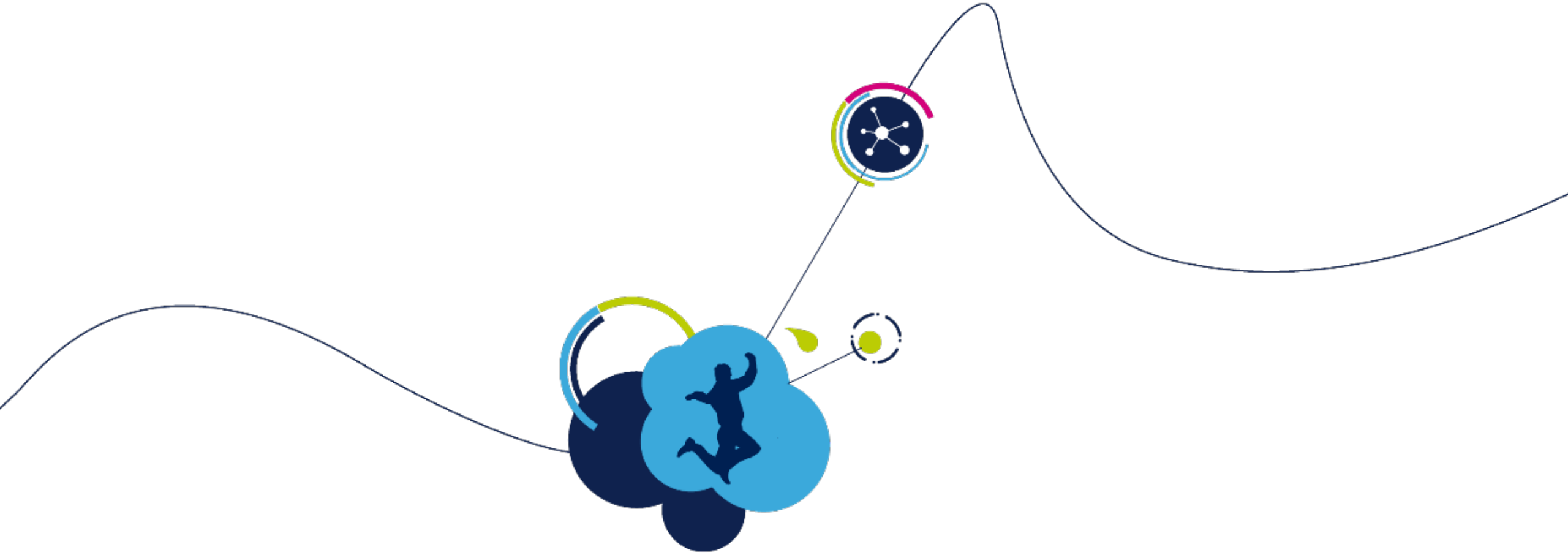
Source: Strategy Analytics, ST

Takeaways

- Automotive is changing and ST is leading the Smart Driving transformation
- ST is the market leader in ADAS covering the full spectrum of functionalities
- ST masters all technologies to enable car connectivity



Questions & Answers

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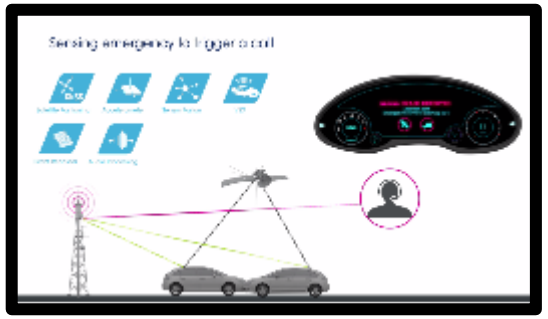
Visit our Stand

Hall 7 A61

Smart Driving

More connected



Internet of Things

Smart Things

Smart City

Demonstrations

1. STM32 Open Development Environment
2. STM32 Ecosystem
3. FlightSense™ Time-of-Flight Sensors
4. Sensing Solutions
5. Wireless Charging
6. Secure Solutions for Wearable
7. NFC Solutions

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