Fact sheet

BOSCH
PENSIONSFONDS

The Bosch pension scheme in Germany

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PI 11908 BPF Loriz

Historical development

- **1929** With Bosch-Hilfe e.V., Robert Bosch establishes retirement and surviving dependants' support for all associates.
- **1999** Bosch merges more than 70 occupational pension schemes into the "Kapital Vorsorge Plan", the company's capital benefit plan.
- **2002** Bosch is the first German industrial company to set up its own pension fund and initially uses it for associates' deferred compensation.
- **2006** The management and employee representatives agree to transfer the Kapital Vorsorge Plan to the Bosch Vorsorgeplan with the Bosch Pensionsfonds serving as the central financing vehicle.
- **2016** Bosch introduces the Fondsrente, through which associates continue to participate in the performance of the Bosch Pensionsfonds during the retirement pension payout phase.

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Bosch Vorsorgeplan

With the Bosch Vorsorgeplan, Bosch offers its associates attractive retirement benefits under one of the most progressive pension schemes in Germany. In addition, associates and their families are covered in the event of disability or death during their working life.

Bosch makes company contributions to fund a pension account for its associates, bearing all the related costs. Associates can add to their pension account by making their own contributions. The account balance develops in line with the investment performance of the Bosch Pensionsfonds. The contributions themselves are guaranteed by the company as a minimum retirement benefit. On retirement, associates can choose from a number of flexible payout options to supplement their income with a company pension.

- 12.5 billion euros of fixed assets in the Bosch Vorsorgeplan
- 170,000 active and former associates with pension entitlements
- (including commitments prior to introduction of the Bosch Vorsorgeplan)
- 63,000 beneficiaries, of whom 3,200 receive disability benefits
- (including commitments prior to introduction of the Bosch Vorsorgeplan)
- Average annual return since its foundation:
  - around 6 percent in the investment segment for associates up to age 55
  - just under 4 percent in the investment segment for associates aged 55 or older

As of December 31, 2025