



Copenhagen | 09/2018

**Whoever has the data,
gets the deal**

- CARMUNICATION -



Business Strategy
Development &
Implementation



Change Management
Turnaround and Start-Up



Human Resource
Development &
Search



Board Advisory
Composition &
Effectiveness



- The changing aftermarket game

- Growth rate by 3% p.a.

- China + 8,1%
- Asia + 6,5%
- Europe / North America + 1,5%

1. Consolidation among the parts distributors
2. Aggressive expansion of the OEM's
3. Digitalization of channel interfaces
4. Access to car-generated data
5. Increasing influence of digital intermedia's
6. High price transparency and greater diversity of suppliers to the customers



Data means Business

70% of vehicles will be **connected*** by **2025**

Data & Software is the **biggest** growth opportunity:
34bn annual sales volume projected for 2025*

The one who controls the **data** gets the **business**
OEM vs. IAM



Data means Business

How is **your business** going to tackle the data revolution?



The impact of data on your business

The impact of live vehicle data on workshops / dealers



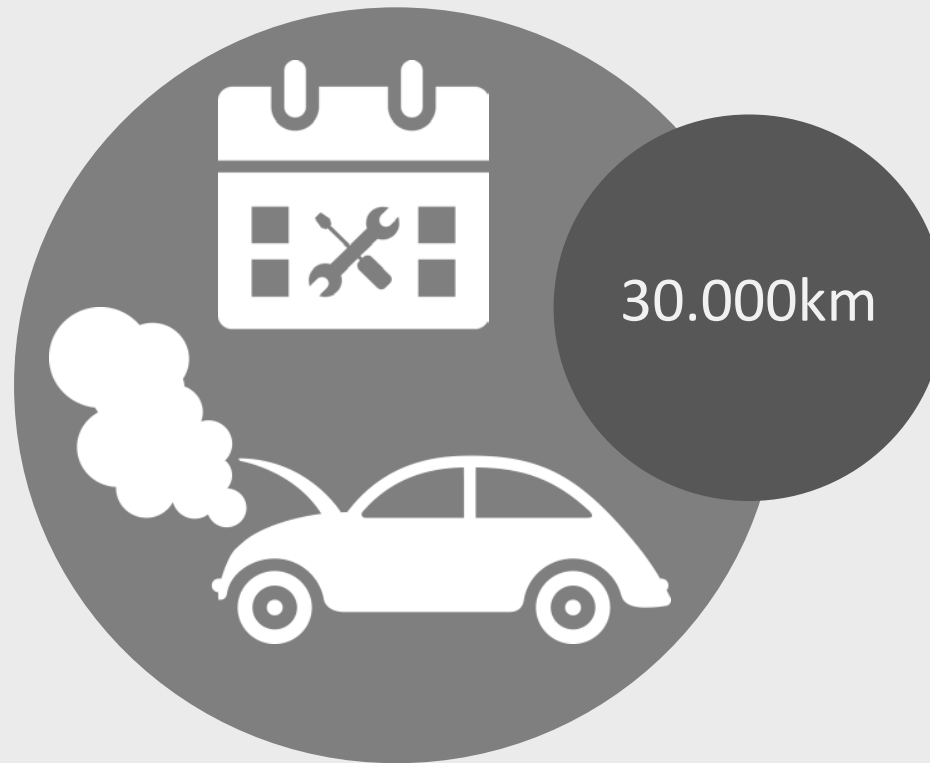
The impact of data on your business

Before
live vehicle
data

How did
you tell if a
car needs
service?

The impact of data on your business

Static service:
according to
manual /
by mileage



Service due
to problems/
breakdowns



The impact of data on your business

Most drivers trust their independent car workshops.

But without fair access to vehicle data, others will get their business.

The impact of data on your business

Without
fair & equal
access



Data is sent to car
manufacturers' servers.

Data is analyzed.

If, e.g., wear is
detected, car
owner is notified.

The impact of data on your business

Without
fair & equal
access

Message from
Manufacturer:

Dear John Doe,
our data analysis
suggests your car
needs a service.

[Click here](#) to obtain a
**3% discount on a
service at our brand
workshop!**



The impact of data on your business

Now let's see how **workshops & dealers** will benefit from **fair and equal access** to **live vehicle data**.

The impact of data on your business

With
fair & equal
access



Data are analyzed in workshop:

Workshop is able to offer service BEFORE problems arise (dynamic service).

Workshop & dealer get business.
Customer gets best, timely service.

Getting fair & equal access for all

To tackle these problems, we need a political solution.

Politics
move
slowly

Getting fair & equal access for all

One data platform that covers all data needs.



Getting fair & equal access for all

One platform



VS.



Individual contract with car manufacturer



Individual contract with car manufacturer



Individual contract with car manufacturer

Personified vs. anonymized data

Now what about privacy?

Is this GDPR-compatible?



Personified vs. anonymized data

Personified

(an example)

Anonymized

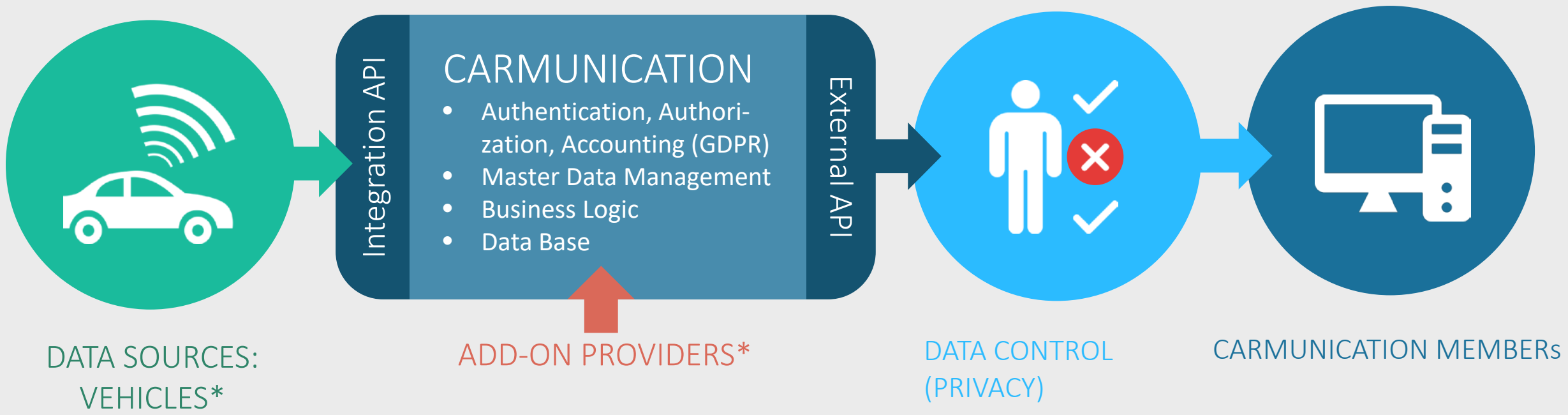
Personal Data

```
{
  VIN: "XYZ1234567890",
  MILEAGE: 10237,
  GPS-LATITUDE: 48.3176
  GPS-LONGTITUDE: 16.4216
  SERVICE_INFORMATION {
    TIME_SINCE_LAST_INSPECTION: 23,
    DISTANCE_FOR_NEXT_INSPECTION: 78,
    MILEAGE_AT_LAST_INSPECTION: 10214,
    ...
  },
  WARNING_INFORMATION {
    OIL_PRESSURE_WARNING: false,
    OIL_LEVEL_WARNING: false,
    ...
  }
}
```

Anonymous Data

```
{
  VEHICLE_MODEL_IDENTIFICATION: "2014 BMW 520d",
  MILEAGE: 10237,
  GPS-LATITUDE: 48.3
  GPS-LONGTITUDE: 16.4
  SERVICE_INFORMATION {
    TIME_SINCE_LAST_INSPECTION: 23,
    DISTANCE_FOR_NEXT_INSPECTION: 78,
    MILEAGE_AT_LAST_INSPECTION: 10214,
    ...
  },
  WARNING_INFORMATION {
    OIL_PRESSURE_WARNING: false,
    OIL_LEVEL_WARNING: false,
    ...
  }
}
```

The Carmunication Platform



*All sources and providers are possible; Carmunication does not necessarily have a contractual basis with them.

Data Usage: Personified and Anonymized

CARMUNICATION MEMBERS



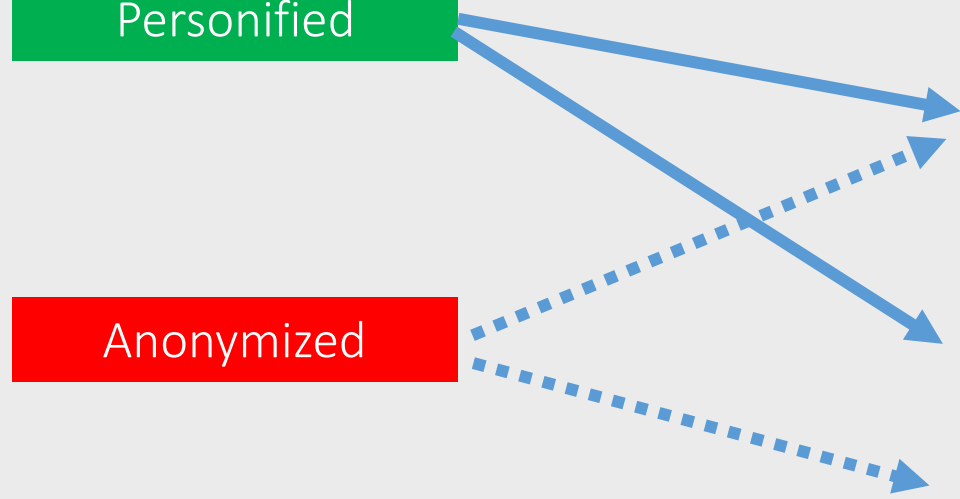
DATA SOURCES:
 GAI: 200 cars
 BIRNER: 50 cars
 BMW: 45 (via DVSE)
 Munic
 Openmatics



(Planning stage: Geotab, PACE)

Personified

Anonymized





SHOWCASE 1: Personified Data



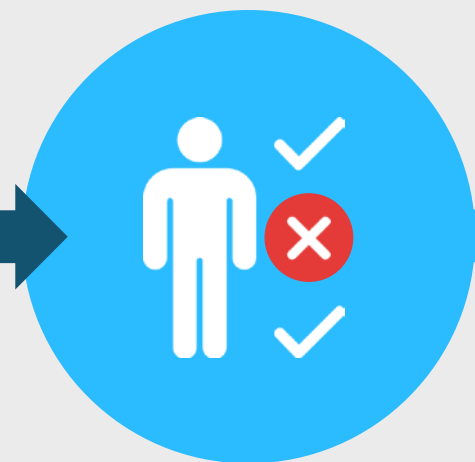
DATA SOURCES:
Personified Data
BIRNER: 50 cars
BMW: 45 (via DVSE)

Integration API

CARMUNICATION

- Authentication, Authorization, Accounting (GDPR)
- Master Data Management
- Business Logic
- Data Base

Personified



DATA CONTROL
(PRIVACY)

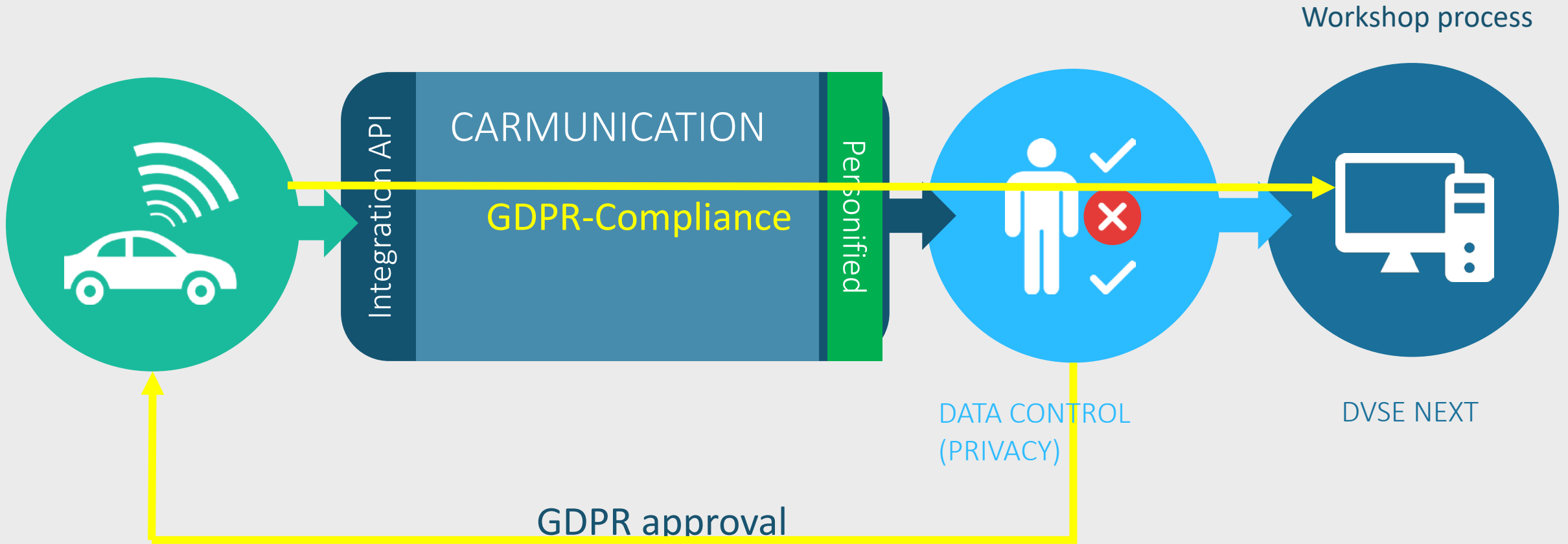


Workshop process

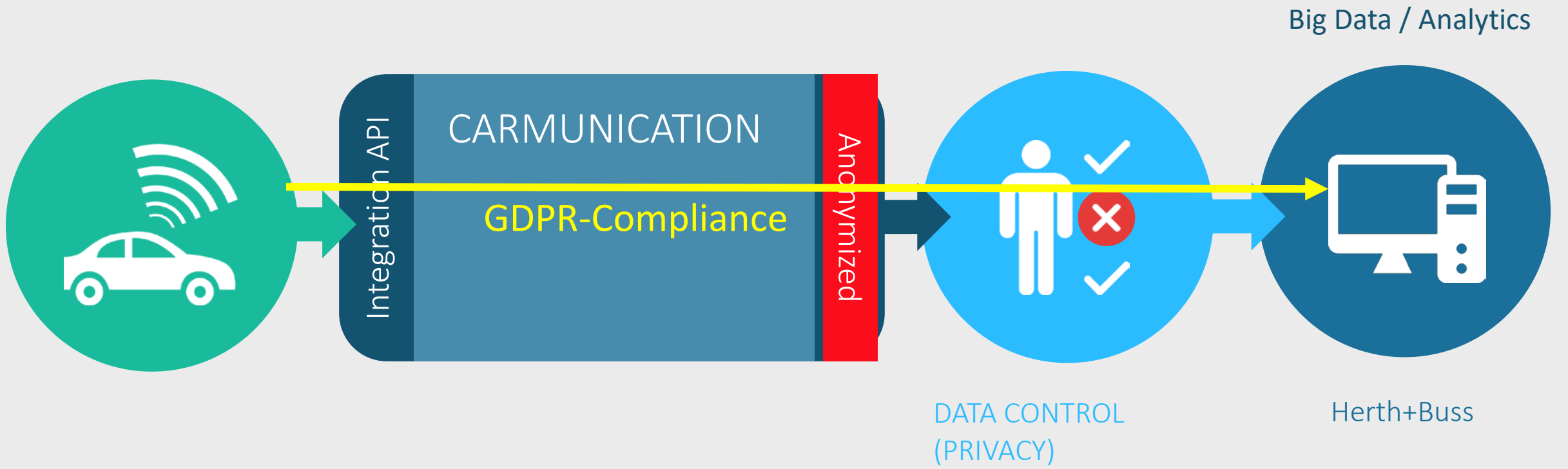
DVSE NEXT



GDPR-COMPLIANCE (personified)



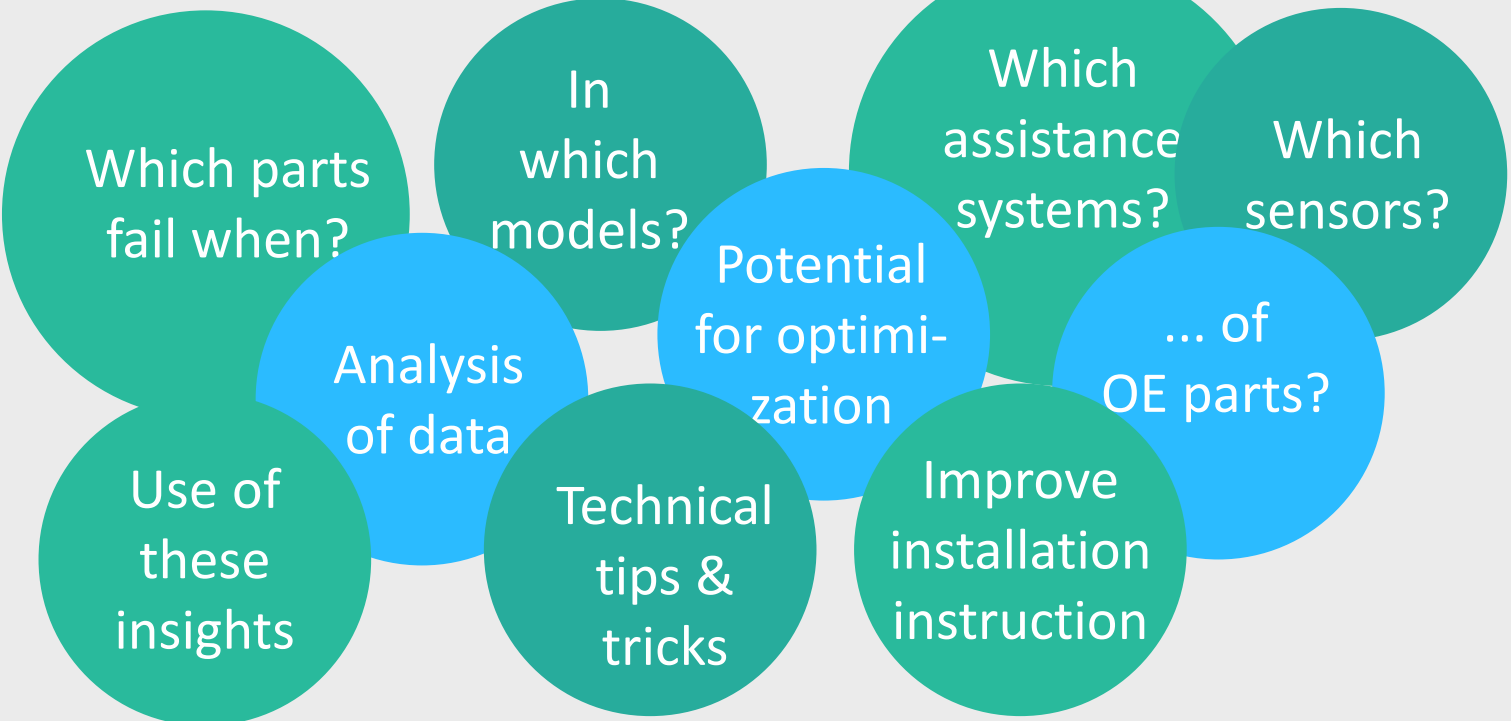
GDPR-COMPLIANCE (anonymized)





Showcase 2: Herth + Buss – Using Vehicle Data to Improve Parts (anonymized data)

The data generated by connected cars are made usable by Carmunication.





The CARMUNICATION Mission !

- One Eco system for the Independent Aftermarket
- Coordinated efforts / political influence
- Open to everybody
- Strong Network for business-relations
- Non-Profit Association
- Equal participation in developing the solution

CARMUNICATION Members

Vehicle & Spare Parts Manufacturers | Spare Parts Dealers | Data Providers
 Workshops & Breakdown Assistance | Insurance, Leasing, Banks & Media
 Dealer Management Systems | Associations





The CARMUNICATION Association

We design the future, while others
just wait for it.





CARMUNICATION: Talk to us

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