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## Market Survey Rollout E-Mobility:

### Strategic recommendations for the development of a charging infrastructure in the retail network

*Market conditions, players, business processes and required methods and tools*

As part of the e-mobility product campaign, automobile manufacturers expect increasing BEV (Battery Electric Vehicle) sales within the next years. This requires an e-specific adjustment of the car dealership infrastructure in sales and aftersales. Based on these requirements, BCON - Management Consultants conduct a market survey on the current business processes and players in the market, deriving recommendations for action in regard to setting up a charging infrastructure in the retail network.

#### Survey of market status / growth in Europe considering legal framework conditions (worldwide: e.g. expanding defined markets)

- > *Analysis of market players:* Status quo and dependence between OEMs, car dealerships (including multi-brand dealers) as well as product and service providers.
- > *Considering the legal framework:* Comparison of national, European and international standards in the field of electromobility.



#### Elaboration of essential business processes for the E-Mobility rollout in the retail network

- > *Definition of business processes:* Development of the basic business processes that are necessary in the context of creating and operating a charging infrastructure in the retail sector.
- > *Deriving a scope of services:* Determination of a maximized scope of service for each business process step.



#### Identification of relevant market players / conducting expert interviews / creation of company profiles

- > *Pre-screening the market:* Identifying relevant players in the market by conducting expert interviews.
- > *Clustering the market players:* Evaluation of the range of services and implementation of a classification to identify best practice approaches.



#### Deduction of strategic recommendations for market-specific rollout concepts

- > *Holistic E-Mobility rollout concept:* Establishment of an E-Mobility rollout concept based on the researched business processes to develop and operate a charging infrastructure in the retail network.
- > *Rollout management components:* Implementation of pilot projects, national adaptation for markets and regions, methods and tools, training and measurement of implementation success.

