

SEMA

POWER OF THE AFTERMARKET
DEPLOYING CONNECTED VEHICLES



CAR MANAGEMENT BRIEFING SEMINARS
TRAVERSE CITY, MICHIGAN USA
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JOHN WARANIAK
VICE PRESIDENT VEHICLE TECHNOLOGY



POWER OF THE AFTERMARKET

SEMA MAKES AND MOVES MARKETS

- Alignment with IntelliDrive – Safety, Mobility and Environment
- Vehicle Technology Megatrends – Creating Consumer Acceptance
- Social Utility Trigger Point – Aftermarket Accelerates Deployment
- Lean Customization – Commonization Drives Customization
- Long Tail Business Model Dynamics – Democratized Disruption
- Connectivity Today – Bridging OEM-AFT with Gateway Modules
- OEM-Aftermarket-Retail Collaboration – Profitable Personalization
- Niche Automakers NOEMs – New Day, New Rules and New Players
- Lifestyle Innovations – Driving Medium Commercialization and Growth

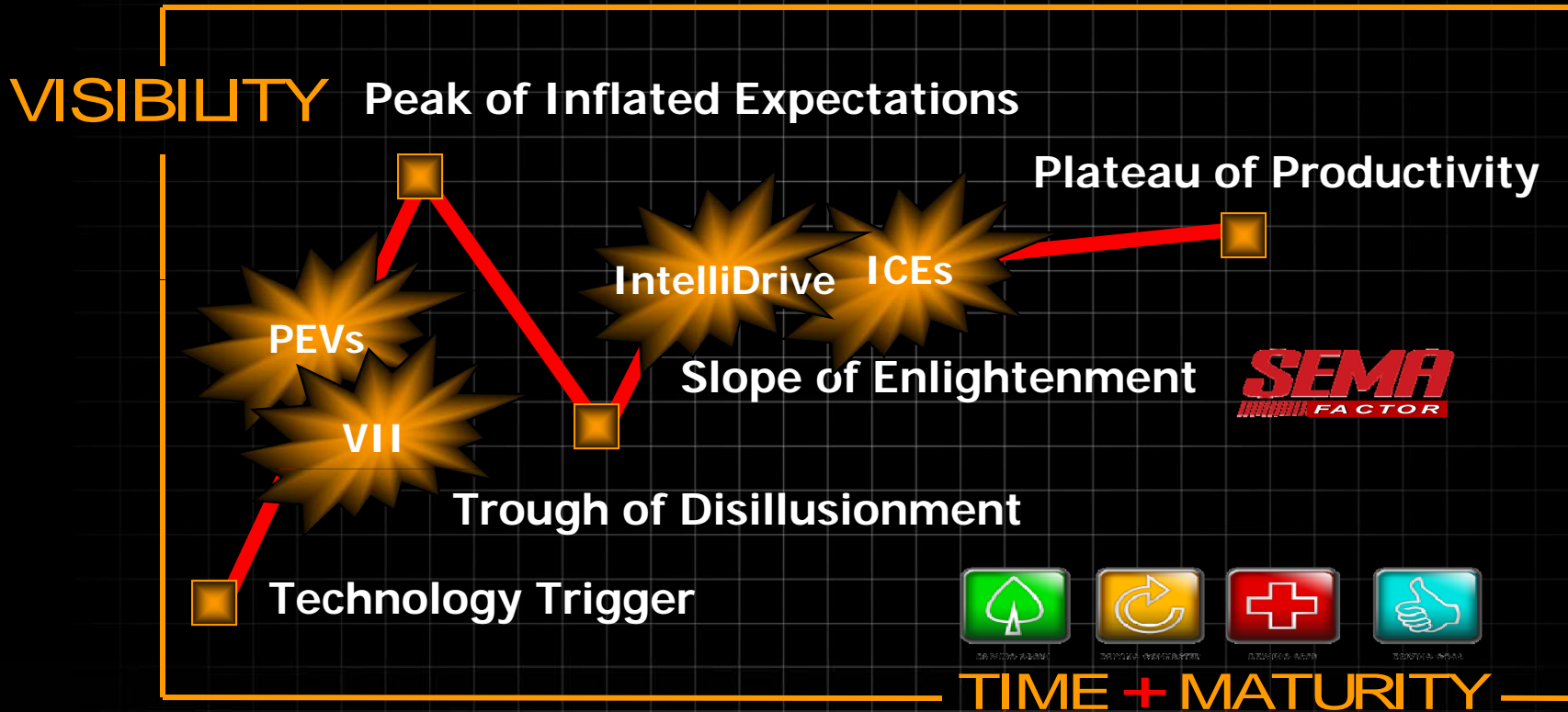
**“It’s Cool to Connect. But it’s past Cool. It’s a reason to Buy.
We’re Going to be the Coolest, Most useful App you’ve ever Had.”**

Ford CEO Alan Mulally 01 APR 2010



HYPE CYCLE

EMERGING TECHNOLOGY EVOLUTION



CONNECTED VEHICLES AND ALTERNATIVE POWERTRAINS

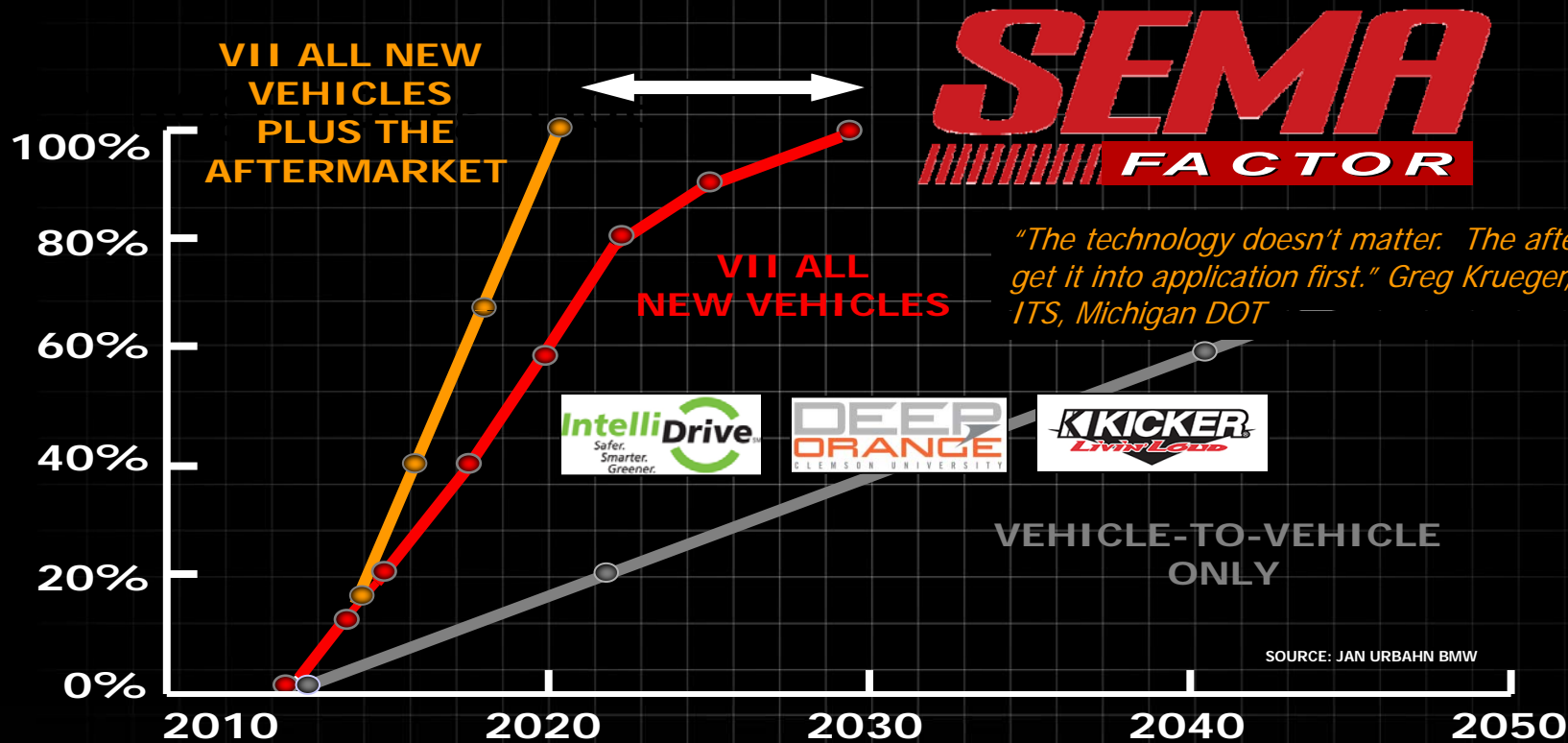


Source: Gartner



SEMA'S ROLE

ACCELERATING DEPLOYMENT THROUGH THE AFTERMARKET



220 M VEHICLES ON THE ROAD – 15 M NEW VEHICLES – PRIVATE SECTOR

CROSS-INDUSTRY COLLABORATION
CARS THAT DON'T CRASH AND DEVICES THAT DON'T DISTRACT
APPS FOR AUTOS



OPEN INNOVATION

POWER OF THE AFTERMARKET



IF IT'S **TOO CONNECTED**, YOU'RE **TOO OLD**

The Old Approach of Proprietary Architectures and Closed Systems hasn't Died Yet and the New Approach to Open Innovation and Collaboration is Just Beginning.

"If You're Not Nervous Every Six Months, You Don't care Enough"
Nike Chairman and Founder, Phil Knight



THANK YOU

