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INDUSTRY INTELLIGENCE REPORT

Every repair runs on information

Week 45 · 2 November 2026

This week in 60 seconds

A repair is no longer only parts and labour. It also takes codes, calibration data and software access, and the company that holds them is not always the one a workshop deals with.

01 A CLAIM NOW COSTS 70% MORE THAN IN 2017

German insurers say an average car damage claim now costs them about €4,600. Since 2017, workshop hourly rates have risen 62% and parts prices about 60%, against 26% for consumer prices.

02 51 DAYS TO THE NEXT ANNEX X DEADLINE

From 23 December, independent diagnostic tool makers must get what they need for variant coding, parts pairing and reprogramming. These are often the steps that finish a modern repair.

03 HONGQI GETS A NEW IMPORTER IN GERMANY

On 28 October, AEC was named Hongqi's importer for Germany, taking over import, homologation and the dealer network. The brand parted ways with its previous importer, Hedin, in the spring.

Every repair runs on information.
The question is who holds it.

A NOTE FROM MARIE

Costs are up. Repairs are harder. A new access deadline lands on 23 December. The importer behind some of these brands changes within a year.

Underneath all of it, the workshop needs the same thing: the right information for the car in front of it, today.

That need outlasts every partner, every price rise and every deadline. Set the access up once with the manufacturer and it holds. Rebuild it with each new importer and you pay for it again.

What are you still rebuilding by hand?

Marie Bredberg

CEO, Biner Data

What this means for Biner Data

When repairs cost more and depend on software, every delay in reaching the right information costs more too. Access becomes part of the service a manufacturer offers, not only a legal duty.

01 THE DECEMBER DEADLINE IS ABOUT FINISHING THE JOB

Variant coding, parts pairing and reprogramming are where a repair stops if the workshop cannot get in. Tool makers need access and agreements in place by 23 December.

02 ACCESS HAS TO OUTLAST A CHANGE OF PARTNER

Importers and dealer groups can change. The cars already on the road still need servicing, so access works best when it is anchored with the manufacturer rather than rebuilt with each new partner.

03 TWO WEEKS LEFT TO COMMENT ON BATTERY ACCESS

The Commission's draft on who may access restricted battery passport data, including information for repair, is open for feedback until 16 November.

Grant access once, in one place,
and keep it whoever sells the car.

RMI COMPLIANCE

What 23 December means in a workshop

From 23 December, Delegated Regulation 2026/699 requires manufacturers to give independent diagnostic tool makers the software, web services or information they need for three operations. Workshops then use those tools. Here is what each one means in practice.

Variant coding

Telling a control unit which version of the car it sits in and what equipment that car has.

For example, after a new control unit is fitted, it has to be told the car's set-up before it works properly.

Parts pairing

Registering a new part to one specific vehicle so the car accepts it.

For example, a correctly fitted camera or control unit may stay switched off until it is paired.

Reprogramming

Loading new or updated software onto a control unit in the car.

For example, after a unit is replaced or when the manufacturer releases a software fix.

01 WHY IT MATTERS

These steps often come at the very end of a repair. A workshop can fit the right part and still be unable to hand the car back if it cannot code, pair or program it. Each manufacturer has to make these operations available to tool makers in a secure way, with checks on who is asking.

Fitting the part is only half the job.
The car still has to accept it.

MARKET SIGNAL

When the importer changes, the cars stay

Many new brands reach Europe through importers. Hongqi, the premium brand of China's FAW Group, shows how quickly that set-up can change in a single market.

Until spring 2026

Hedin Automotive

Imports and sells Hongqi in Germany. The models do not sell as well as hoped.

Spring 2026

Hongqi on its own

The partnership ends and Hongqi plans to run the German business itself.

28 October 2026

AEC takes over

AEC is named official importer, responsible for import, homologation, logistics and a new dealer network.

The pattern is spreading. In Italy, FAW's new Fawcar brand launched in October with China Car Company as its importer and distributor.

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01 WHY IT MATTERS

Every change of partner means new contacts and new contracts. The duty to give access to repair information stays with the manufacturer, and the workshops servicing cars already on the road still need it on the same day.

Importers change.
The cars they sold do not leave the road.

REPAIR & DIAGNOSTICS

Repairs cost more, and many are harder to do

German motor insurers now pay about €4,600 for an average car damage claim, around 70% more than in 2017, according to the German Insurance Association (GDV). Workshop rates and parts prices have risen far faster than prices in general.

Price increase in Germany, 2017 to 2025



THE DRIVER-ASSISTANCE GAP

47% of 600 workshops surveyed by Roland Berger in 13 markets had to turn down repairs on driver-assistance systems in the past year.

58% of the workshops surveyed named a lack of calibration equipment as the main reason.

Repairs are both pricier and more technical, and both turn on the right information.

COMPLIANCE CALENDAR

The dates to keep in view

Counted from Monday 2 November 2026.

14
days

16 November 2026

Feedback closes on the Commission's draft rules for who may access restricted battery passport data.

51
days

23 December 2026

Annex X. Software, web services or information for independent diagnostic tool makers, covering variant coding, parts pairing and reprogramming.

108
days

18 February 2027

Battery passport mandatory for EV batteries placed on the market.

233
days

23 June 2027

Annex X. VIN-specific information and the maintenance-history API through a third party. Tool-maker access extends to vehicle types approved between September 2020 and July 2022.

2028

31 May and 23 June 2028

The motor-vehicle block exemption expires on 31 May. From 23 June, Annex X also covers work that depends on software updates.

Two dates fall before the end of the year.

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THE BIGGER PICTURE

Every repair runs on information.

How fast it gets done depends on how fast the data arrives.

This week's signals point the same way. Repairs in Germany cost far more than they did a few years ago. Many workshops already turn away work on driver-assistance systems. From 23 December, the software steps that finish a repair come under new access rules. And for some new brands, the company in charge of their cars changes within a year. The workshop's need stays the same throughout. It needs the right information for the car in front of it.

Set the access up once, and the repair can start with the car instead of the paperwork.

SOURCES & NOTES
MARKET INTELLIGENCE

REPAIR COSTS IN GERMANY

German Insurance Association (GDV), 29 October 2026, via dpa and autohaus.de, 30 October 2026. mobiflip, 29 October 2026.
Average claim cost and price changes for workshop rates, parts and consumer prices, 2017 to 2025.

WORKSHOPS AND DRIVER-ASSISTANCE REPAIRS

Roland Berger, press release, 11 December 2025.
Survey of 600 workshops and 6,000 car owners in 13 markets.

DELEGATED REGULATION (EU) 2026/699

EUR-Lex, Official Journal L, 3 June 2026, Annex X.
Tool-maker access for variant coding, parts pairing and reprogramming, and the deadlines.

HONGQI AND FAWCAR

autohaus.de, 28 October 2026. FAWCAR press release, 25 October 2026. autoblog.it, 7 August 2026.
Importer changes in Germany and the Italian launch.

BATTERY PASSPORT

European Commission consultation on access rights, reported by LexisNexis, 20 October 2026.
EUR-Lex, Regulation (EU) 2023/1542.
Feedback deadline and application date.

COMPETITION LAW

EUR-Lex, Commission Regulation (EU) 2023/822.
Expiry of the motor-vehicle block exemption on 31 May 2028.

EDITORIAL NOTE

This report combines publicly available information with Biner Data analysis. References to companies do not imply a commercial relationship. Regulatory summaries are for industry intelligence purposes and do not constitute legal advice.

CHART NOTE

Page 7 chart by Biner Data, based on figures published by GDV.

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THANKS FOR READING

Regulated data, simplified.

Biner Data runs the layer between data providers and data recipients. Access is granted and revoked in one place, with both recorded.

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