



9<sup>th</sup> **C L E P A**  
AFTERMARKET  
CONFERENCE  
21-22 MARCH 2018

PROGRAMME

# Overview of the Conference

## CLEPA Networking Dinner

21<sup>st</sup> March 2018 starts at 18:00

## Automotive Aftermarket Conference

22<sup>nd</sup> March 2018 from 08:30 – 15:45

Key Note speaker:

**Stefan Gross-Selbeck,**

BCG Digital Ventures

Moderator:

**Catherine Stupp**

## Networking Dinner March 21<sup>st</sup>

Times	Speakers	Presentation
18:00 - 19:30	Registration and Cocktails in the lobby	
19:30 - 19:45	<b>Roberto Vavassori</b> , CLEPA	Welcome address
19:45 - 20:15	<b>Stefan Gross-Selbeck</b> , Boston Consulting Group - Digital Ventures	Are you ready for digital disruption?
20:15 - 22:30	Networking Dinner	

## Conference March 22<sup>nd</sup>

Times	Speakers	Presentation
08:45 - 09:00	<b>Frank Schlehuber &amp; Sigrid de Vries</b> , CLEPA	Welcome & Opening Speech
09:00 - 09:30	<b>Eddy Hartog</b> , European Commission	Driving data across EU borders
09:30 - 10:00	<b>Franck Leveque</b> , Frost & Sullivan	Disruptive trends in OE and Aftermarket
10:00 - 10:30	<b>Niels Reiff Koggersboel</b> , QVARTZ <b>Dimitri Belobokov</b> , Stern Stewart & Co.	The Future of the Aftermarket
<b>10:30 - 11:00</b>	<b>Coffee break</b>	
11:00 - 11:30	<b>Markus Josten</b> , GKN	3D-Metalprinting for spare parts – Status and future potential
11:30 - 12:00	<b>Dr Harald Neumann</b> , Bosch	Diagnostics of the future
12:00 - 12:30	<b>Dr Peyman Merat</b> , Daimler AG	Connected Vehicles – Challenges and Opportunities
<b>12:30 - 13:30</b>	<b>Lunch break</b>	
13:30 - 13:55	<b>Stefan Duscha</b> , Allianz-Versicherungs AG	Telematics based insurance models
13:55 - 14:20	<b>Alexander Haid</b> , CARUSO	The market place for mobility data
14:20 - 14:45	<b>Mark Michl</b> , CAAROBI	The new car service – One brand for everything your car needs
14:45 - 15:10	<b>Artur Oswald</b> , Retromotion	eCommerce Platform for Classic Cars
15:10 - 15:30	<b>Franz Guttenberger</b> , b4payment <b>Judith Brendelberger</b> , Checkout.com	Innovative Payment Systems
15:30 - 15:40	<b>Frank Schlehuber</b> , CLEPA	Closing Remarks
15:40	<b>Airport Shuttle departs</b>	<b>15:50</b> Arrival at airport

Market and Legislative Environment (09:30 - 10:30)

Disruptive Technologies (11:30 - 12:30)

New Business Models (13:30 - 15:40)

# Table of Contents

---

Welcome to the 9 <sup>th</sup> CLEPA Aftermarket Conference	04
CLEPA – The European Association of Automotive Suppliers	05
Programme	06
Keynote speech	08
Market and Legislative	10
Disruptive Technologies	16
New Business Models	22



**The place  
to meet for  
Automotive  
Suppliers**

# Welcome to the 9<sup>th</sup> CLEPA Aftermarket Conference

---

**The CLEPA Aftermarket Conference is the leading Aftermarket conference in Europe and the place to meet for Automotive Suppliers. The conference offers a platform for the European Automotive industry to learn and exchange views and visions about the market trends and technological developments which will influence the service business in the coming years.**

The CLEPA Aftermarket Conference, meanwhile in the 9th consecutive year, has increasingly been acknowledged as a pioneering event. It is as well a valuable platform for policymakers from the European Union and industry specialists to meet and understand from each other the future challenges of the automotive industry and the importance of the Aftermarket. It is also a great opportunity to meet the relevant players of the automotive industry and the aftermarket supply chain.

CLEPA is proud that the participation this year again includes a diverse group, with

representatives of Europe's Automotive Industry, the Institutions of the European Union and its Member States, as well as the specialised press.

We are confident that this conference will give you a deeper insight into the disruptive trends for mobility and its consequences for the Automotive Aftermarket as well as some useful hints on how to successfully develop your Aftermarket business.

CLEPA cordially welcomes you to this event and looks forward to a rich and honest exchange of views and positions, resulting in inspiring discussions.



**Roberto Vavassori**  
CLEPA President



**Sigrid de Vries**  
CLEPA Secretary General



**Frank Schlehuder**  
CLEPA Aftermarket Director

# CLEPA - the European Association of Automotive Suppliers

## WHAT IS CLEPA?

CLEPA - the European Association of Automotive Suppliers - **brings together over 120 global suppliers** of car parts, systems and modules and **more than 20 national trade associations and European sector associations**.

## WHAT DOES CLEPA DO?

CLEPA is the **voice of the EU automotive supplier industry** linking the sector to policy makers.



“**Our Vision** is for the European Automotive Supply Industry to be the **leading provider** of highly efficient & sustainable **mobility** worldwide”



“**Our Mission** is to increase the **competitiveness** of the European Automotive Supply Industry and drive its sustainable **growth** while enhancing **wealth** and **employment**”

- CLEPA **supports the EU and UN** in their decision making and shapes the legislation impacting the automotive business
- CLEPA is a **credible partner** to the EU institutions and UN authorities
- CLEPA **actively endorses the development of competitive framework conditions**
- CLEPA **ensures the consistent development** of international trade and technical harmonisation
- CLEPA **promotes innovation and ensures EU funding for Research and Innovation**
- CLEPA fully **complies with EU competition law and antitrust rules**

## 60 YEARS OF ASSOCIATION

CLEPA stands for *Comité de Liaison des fabricants d'Equipements et de Pièces Automobiles*, or the **Association of Automotive Suppliers**.



The initial reason behind the foundation of CLEPA was the **establishment of the United Nations Economic Commission for Europe (UNECE) 1958 Agreement** which focuses on technical harmonisation in the automotive sector. CLEPA has ever since acted as the suppliers' global representative in UNECE.

The automotive industry is one of the most regulated sectors in Europe and, today, the association is **based in Brussels** to facilitate contacts with the European Union and is **registered as an international non-profit organisation (AISBL)**.

CLEPA was **founded in Geneva in 1959** by the National Associations of Automotive Suppliers. Direct corporate membership was added in 1995. CLEPA also has European sector associations in its ranks.

Visit our website: [www.clepa.eu](http://www.clepa.eu) and follow us    

# PROGRAMME

## Networking Dinner March 21<sup>st</sup>

18:00 Registration and Cocktails in the lobby

---

19:30 **Welcome address**  
by **Roberto Vavassori**, President of CLEPA

---

19:45 **Are you ready for digital disruption?**  
**Stefan Gross-Selbeck**, Boston Consulting Group  
- Digital Ventures

---

20:15 Networking Dinner

---

## Conference March 22<sup>nd</sup>

08:45 **Welcome & Opening Speech**  
**Frank Schlehuder**, Director Aftermarket, CLEPA  
**Sigrid de Vries**, Secretary General, CLEPA

---

09:00 **MARKET AND LEGISLATIVE**

---

**Driving data across EU borders**  
**Eddy Hartog**, Head of Unit DG CONNECT,  
European Commission

---

**Disruptive trends in OE and Aftermarket**  
**Franck Leveque**, Business Unit Leader, Mobility Team,  
Partner, Frost & Sullivan

---

**The Future of the Aftermarket**  
**Niels Reiff Koggersboel**, QVARTZ  
**Dimitri Belobokov**, Partner, Stern Stewart & Co.

---

10:30 **Coffee Break & Networking**

---

11:00 **DISRUPTIVE TECHNOLOGIES**

---

**3D - Metal printing for spare parts** - Status and future potential  
**Markus Josten**, Sales Director, GKN

---

# PROGRAMME

---

## **Diagnostics of the future**

**Dr Harald Neumann**, Vice President Engineering, Bosch

---

## **Connected Vehicles** – Challenges and Opportunities

**Dr Peyman Merat**, Senior Manager Smart Data & Analytics,  
Daimler AG

---

12:30 **Lunch break & Networking**

---

13:30 **NEW BUSINESS MODELS**

---

## **Telematics based insurance models**

**Stefan Duscha**, Project Manager Product Development, Allianz-  
Versicherungs AG

---

## **The marketplace for mobility data**

**Alexander Haid**, Managing Director, CARUSO

---

## **The new car service** – One brand for everything your car needs

**Mark Michl**, Founder of CAROOBI

---

## **eCommerce Platform for Classic Cars**

**Artur Oswald**, Founder of Retromotion

---

## **Innovative Payment Systems**

**Franz Guttenberger**, Co-founder and partner, B4payment  
**Judith Brendelberger**, Country Manager, Checkout.com

---

15:20 **Closing Remarks**

**Frank Schlehuber**, Director Aftermarket, CLEPA

---

# KEYNOTE SPEECH

8



**Stefan Gross-Selbeck,**  
**BCG Digital Ventures**  
**Keynote speaker**

Digital disruption presents opportunities and risks and drives innovation. Speed and agility of start-ups increasingly competes with core competences of established market player. The right mind-set is key.

Are you ready for digital disruption?

## Stefan Gross-Selbeck

Managing Director

**Boston Consulting Group - Digital Ventures**

Stefan Gross-Selbeck joined BCG Digital Ventures, The Boston Consulting Group's corporate venture investment and incubation firm, in 2014. He manages the firm's operations across Europe and directs the global innovation and investment centre in Berlin.

As one of Germany's most accomplished internet executives, Stefan has been successfully building, launching and running digital businesses and platforms for more than 15 years. His client work focuses on transforming traditional industries through the experience he gained as an executive of highly innovative digital companies. He has particularly deep expertise in the consumer, mobility, and financial services sectors.

Stefan is actively involved in the startup community as an angel investor and advisor. Outside of BCG Digital Ventures, he regularly speaks on business model innovation and market disruption at industry events. He has also been a visiting professor of entrepreneurship at the Alexander von Humboldt-Institute for Internet and Society.

Prior to joining Digital Ventures, Stefan was the CEO of XING, Europe's leading social network for professionals. He previously held leadership roles at eBay, including vice president and managing director of eBay Germany. He was also a managing director at ProSieben Digital Media and a project leader for BCG in Germany.





# MARKET AND LEGISLATIVE

## Mobility of the future – State of play at EU-Level

10



### Eddy Hartog

Head of Unit Smart Mobility and Living  
**DG CONNECT, European Commission**

Mr Hartog has Dutch nationality and was born and raised in Utrecht (the Netherlands). He obtained a degree in political economics at the Erasmus University (Rotterdam) and subsequently a post-graduate degree at the College of Europe (Bruges, Belgium).

He has worked in the European Commission since 1989, first in Trade policy, then in Regional policy and in Maritime policy and lately in Information Society and Media policy. He is a Head of Unit since 2003. His present responsibility (since July 2016) is Head of Unit for Smart Mobility and Living in DG Communication Networks, Content and Technology. Mr Hartog is married and has two daughters.

#### Eddy Hartog, European Commission Driving data across EU borders

Usage of data across border is a prerequisite to turn Europe into a real "data economy". The European Automotive industry is an important future pillar and can take the lead as a pilot.



# MARKET AND LEGISLATIVE

## Disruptive trends in OE and Aftermarket

12



### **Franck Leveque**

Partner at Frost & Sullivan  
**Frost & Sullivan**

Franck Leveque currently is Mobility Business Unit Leader as well as Partner with Frost & Sullivan. He had been executing the function of the Mobility Practice head for Europe, Israel and Africa since 2010.

Prior to this, he held several functions within Frost & Sullivan such as Director of the Automation & Electronics Business Unit from 2009 to 2010, Consulting Director of the Mobility Business Unit from 2007 to 2008 as well as Programme Director and Project Manager between 2001 and 2006.

Before joining Frost & Sullivan, Mr Leveque worked as a Junior Consultant in a communication consultancy in the UK.

By education, Mr Leveque has a Bachelor Business Management degree from Oxford.

### **Franck Leveque, Frost & Sullivan Disruptive trends in OE and Aftermarket**

The automotive sector is going through a substantial transformation. New players and new ways of vehicle distribution and usage will re-shape the entire OE and aftermarket.



# MARKET AND LEGISLATIVE

## The Future of the Aftermarket

14



### Niels Reiff Koggersboel

Senior Partner

**QVARTZ**

Niels Koggersbøl is a senior partner in our Stockholm Office, serving as part of the Quartz executive leadership team. He has more than 20 years of experience in management consulting in Europe and the US. During this time, he has been actively involved in strategy, M&A activities and corporate transformation projects especially within the Energy, Industrial and Consumer goods sectors. Niels R. Koggersbøl has an MSc in Engineering from DTU (Danish Technical University) an MBA from INSEAD as well as various executive education programmes from Harvard and McKinsey&Co Prior to his current job, Niels worked as partner in McKinsey & Co. and as Senior Manager in Aarsø Nielsen & Partners (now A.T. Kearney).

**Niels Reiff Koggersboel,**  
**QVARTZ**  
**Dimitri Belobokov,**  
**Stern Stewart & Co.**  
**The Future of the**  
**Aftermarket**

Main drivers for changes in the aftermarket are:

- Vehicle technology
- Vehicle owners
- Change in distribution

Automotive suppliers can take a major role in a transforming market.

---

---

---

---

---

---

---

---

---

---

## Dimitri Belobokov

Partner

**Stern Stewart & Co.**

Dimitri Belobokov is a partner at Stern Stewart & Co. located in Munich. He was born in Moscow in 1972 and studied Business Administration in Moscow and Stuttgart, Germany. He has been with Stern Stewart & Co. since 2001 and partner since 2010. The focus of his project work is in the automotive industry. During his time with Stern Stewart & Co., he has supported car manufacturers and major suppliers in strategy development and deployment, organizational transformation and the implementation of comprehensive profit improvement programs. The regional focus of his project work is in the Continental and Eastern Europe.

Stern Stewart & Co. is an independent strategy consulting boutique founded in New York with global headquarters now located in Munich. We consult leading companies, entrepreneurs and state funds on core issues of management. Our company is owned by the active partners. In addition to consulting we assume responsibility with our Think Tank, the Annual Summit and the financing and implementation of corporate non-for-profit projects as part of The Stern Stewart Institute.

---

---

---

---



# DISRUPTIVE TECHNOLOGIES

16



## 3D-Metal printing for spare parts – Status and future potential

### Markus Josten

Sales Director

**GKN**

Global Sales Director Disruptive Technologies and markets, GKN Additive

2017 – today: GKN – Global sales Director Disruptive Technologies and Markets

2017 – 2015: GKN – Sales Director EU KA4

2015 – 2008: GKN – Global Key Account Manager Automotive

2008 – 2004: GKN – Lean Enterprise and Manufacturing Engineering

Educational background: Diploma in Mechanical Engineering from University of Applied Science in Gelsenkirchen.

#### Markus Josten, GKN 3D-Metal printing for spare parts – Status and future potential

3D printing is expected to be one major driver to transform the value chain especially in the aftermarket. How far is that technology advanced and ready to take to influence business models.





# DISRUPTIVE TECHNOLOGIES

18



**Dr Harald Neumann,  
Bosch**  
**Diagnostics of the future**

Vehicles get increasing complex. This will also require new ways of diagnostic solutions. The relevance of the OBD will continue but not stay the only solution for workshop to service vehicle. Additional competencies will be needed.

## Diagnostics of the future

### Dr Harald Neumann

Vice President Engineering

**Bosch**

**Education:**

- Studies of "Electrical Engineering" at RWTH Aachen (Diploma)
- PhD in „Solid-State Electronics“ at RWTH Aachen

**Professional Experience:**

- 1988 – 1999: Specialist and Group Manager for Exhaust Gas Sensors Stuttgart, Germany
- 1999 – 2001: Department Head Engineering Exhaust Gas Sensors Detroit, MI
- 2001 – 2004: Director Global Engineering Exhaust Gas Sensors Stuttgart, Germany
- 2005 – 2009: Senior Director Engineering Gasoline Systems Shanghai, China
- 2009 – 2018: President Engineering Automotive Diagnostics Stuttgart, Germany

**Personal Interests:**

- Sports (cycling, running, golf)
- Music (classical music, Jazz)
- Travelling, Photography



# DISRUPTIVE TECHNOLOGIES

## Connected Vehicles – Challenges and Opportunities

20



### Dr Peyman Merat

Senior Manager Smart Data & Analytics  
**Daimler AG**

Dr Peyman Merat studied at the Technical University München Germany, Mechanical Engineering and Aeronautics and completed his Doctoral by 1996.

Dr Merat joined 1996 Daimler and has been since working in various leading positions e.g. program lead of CAx and PLM at Mercedes-Benz in Product Development Chain, at Mercedes-Benz plant in Tuscaloosa Alabama the US, head of the launch of SUV model years. From 2007-2010 Dr Merat was responsible department manager in Advanced Engineering VR and AR in production systems and autonomous vehicle move in the production plant.

2010-2015 he was the executive program lead for the introduction of an advanced CAD-System worldwide at all design centres of Daimler passenger cars, vans, trucks and buses.

Since 2016 he manages as the representative of Daimler in VDA and ACEA (German and European Vehicle Manufacturer Associations) the initiative "Access to Vehicle Data by Third Parties and is the responsible leader of the "Extended Vehicle" Program.

**Dr Peyman Merat,**  
**Daimler AG**  
**Connected Vehicles**  
**– Challenges and**  
**Opportunities**

Connectivity provides new possibilities to stay in contact with consumers and to offer additional services over the lifespan of the vehicle usage.



# NEW BUSINESS MODELS

## Telematics based insurance models

22



### Stefan Duscha

Project Manager and Innovation Manager –  
Product Development Motor Retail

**Allianz-Versicherungs AG**

#### Current position:

Project Manager and Innovation Manager – Product Development Motor Retail at Allianz Germany

#### Responsibilities:

- Responsible for the entire Telematics Program and Products, New Mobility
- Innovation-Manager Allianz Germany
- Member of several Working Groups and Steering Committees of the Association of German Insurers

#### Positions in the past:

- Business Transformation / Operations – Head of Sales Applications Motor and Business Process Management Motor at Allianz Germany
- Underwriter and Fleet- Manager Motor
- More than 25 Years of Experience in Motor Insurance Business

#### Education:

- Bachelor of Insurance Business focused on P&C
- Certified SCRUM Master (Scrum Alliance)
- Certified Project Manager

Stefan Duscha, Allianz-Versicherungs AG  
**Telematics based insurance models**

Connectivity provides new possibilities of offering services beyond insurance to vehicle owners and users. Solutions for individuals are the new service.



# NEW BUSINESS MODELS

## The marketplace for mobility data

24



### Alexander Haid

Managing Director  
**CARUSO GmbH**

Alexander Haid (50), has been one of the two managing directors of Caruso GmbH since its foundation in March 2017. His areas of responsibility include partner management, cooperation, human resources, technology, communication/PR and legal. Previously, he had been in charge of the Caruso project at TecAlliance since 2015 in his function as Head of Corporate Strategy & Projects.

Prior to joining TecAlliance, he worked as a consultant primarily in the areas of corporate strategy/development, M&A, sales and customer service as well as price and conditions management for companies in the automotive and engineering industries.

From 2011 to 2014, Alexander Haid served as Vice President Global After Sales at Magna International. From Canada and China, he developed and implemented worldwide after-sales strategies, associated corporate structures, manufacturing concepts and business models for the most profitable OES and IAM business.

In 1993 he joined Bosch Automotive Aftermarket for a total of 16 years. Most recently, as Vice President Europe West & South, he was responsible for the region's return on sales. He was in charge of parts business, workshop equipment, training, customer service and workshop concepts for the Bosch workshop chain. Prior to this position, Alexander Haid worked for the company from Singapore for seven years as General Manager South East Asia and Director Product Marketing for the Asia Pacific.

He began his professional career at Bosch in 1993 in technical customer service. In 1993 Alexander Haid completed his mechanical engineering studies at the University of Kaiserslautern as a graduate engineer in the field of mechanical engineering with a focus on production.

#### Alexander Haid, CARUSO The marketplace for mobility data

Each business needs a market place, so does the data driven service business. CARUSO provides a platform that connects OEMs, service providers and independent players to offer innovative and beneficial services for consumers.





# NEW BUSINESS MODELS

26



The new car service – One brand for everything your car needs

## Mark Michl

Founder of CAROobi  
**CAROobi**

Sep 2015 – Present: Founder, CarooBi

CarooBi is a vertically integrated marketplace that connects car owners to high-quality mechanics. We are here to shake up a dormant industry and disrupt the automotive after-sales market by massively improving the user experience through the use of technology.

Jun 2015 – Sep 2015: Rocket Internet SE, Head of Sales

Mar 2015 – Jun 2015: Quandoo GmbH, Sales Director Australia

Aug 2014 – Mar 2015: Quandoo GmbH, Sales Director UK

Apr 2014 – Aug 2014: Quandoo GmbH, Key Account Manager EMEA

Feb 2014 – Apr 2014: Quandoo GmbH, Business Development Executive

Jul 2007 – Oct 2010: Escalado Fashion, Founder

2011 – 2014: James Cook University, Singapore Bachelor's Degree Marketing/Marketing Management, General

### Activities and Societies:

JCU Singapore Football Club

**Mark Michl, CAROobi**  
**The new car service – One brand for everything your car needs**

Repair business in the past was based on an individual approaching a workshop. CAROobi offers a solution beyond and offers new ways of not only managing the service demand of vehicles but also to give consumers a new service experience.



# NEW BUSINESS MODELS

## eCommerce Platform for Classic Cars

28



### Artur Oswald

Founder of Retromotion

#### Retromotion

- Dec 2016 – Present: Founder, Fahrtwind GmbH (Retromotion)
- Nov 2012 – Present: REVOPRINT, Founder & CEO PaaS Solution for 2D ([www.revoprint.de](http://www.revoprint.de)) and 3D Printing ([www.3D-revoprint.com](http://www.3D-revoprint.com))
- Feb 2009 – Sep 2015: SAP, Solution Monetization Management of solution monetization processes. Analyzing, preparation and execution of launch and go to market strategies
- Apr 2011 – Aug 2011: engage venture AG, Innovation Management Technology screening. Business Development. Analysis of market potential. Go to market strategies. Feasibility tests.
- Apr 2007 – Jan 2009: b-wise GmbH, HiWi Assistance of Managing Board.
- 2005 – 2011: Karlsruher Institut für Technologie (KIT) Diploma in industrial engineering

#### Artur Oswald, Retromotion eCommerce Platform for Classic Cars

eCommerce is gaining ground in many aspects of our life, also in the automotive repair business. Retromotion provides the first multi-brand platform for spare parts for classic cars.



# NEW BUSINESS MODELS

## Innovative Payment Systems

30



### Franz Guttenberger

Co-founder and partner

**B4payment**

Franz, born 1981, graduated in economics and politics and is working more than a decade in the international banking and e-commerce sector. During this time, he focused on alternative payments and benefits of the risk diversification in the SEPA economy and different options for entities to process payments with the adequate banking license. 2014 - he founded b4payment a banking white label enabler for corporates and PSPs to process SEPA payments. Together with other German payment specialists, he is co-founder and partner of the PaymentExchange - a platform for merchants to educate each other with the latest industry trends in banking and fintech.

Franz Guttenberger,  
b4payment  
Judith Brendelberger,  
Checkout.com  
Innovative Payment  
Systems

The vehicle of the future is part of an eco-system allowing convenient payment to all kinds of services simply by using the vehicle. Innovative payment systems are key to such user experience.

---

---

---

---

---

---

---

---

---

---

## Judith Brendelberger

Country Manager

**Checkout.com**

- 11/2013 - 12/2014 Junior Account Manager at Deltavista GmbH
- 12/2014 - 10/2016 Account Manager at Deltavista GmbH
- 11/2016 - 07/2017 Key Account Manager CRIF GmbH

Since 08/2017 Country Manager D-A-CH (Germany, Austria & Switzerland) where I built up the German entity of Checkout.com. Checkout.com was Launched in 2012 and is a leading international provider of online payment solutions. We currently process 150+ currencies and offer access to all international cards and popular local payment methods to merchants through one integration.



---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---









## CLEPA would like to thank:



Cours Saint-Michel 30  
1040 Brussels  
Belgium

Phone: +32 2 743 91 27  
Fax: +32 2 732 00 55  
aftermarket@clepa.be

Visit our website: [www.clepa.eu](http://www.clepa.eu) and follow us

