

Press release

Access to in-vehicle data and resources will be key as the aftermarket prepares for new vehicle technologies

- The aftermarket community discussed vehicle technology challenges at the **CLEPA Aftermarket Conference 2023**, including the need for cybersecurity and authorisation for replacement parts.
- **CLEPA appreciates the horizontal Data Act but still sees the need for a sector-specific legislation to ensure a vibrant service market based on fair, equal and competitive access for all service providers, benefiting consumers.**
- **CLEPA and Boston Consulting Group predict that by 2030, 15% of passenger cars will be owned by fleets, driving the electrification of the vehicle parc.**

Brussels, 5 April 2023 – With the shift to battery electric vehicles and the rise of connected vehicles equipped with new Electric & Electronic (E/E) architectures, the European automotive industry is undergoing an unparalleled transformation. As these new technologies gain momentum, the entire value chain must prepare for the challenges of servicing such vehicles over the next few decades.

These challenges for the service industry were the focus of the 14th edition of the **CLEPA Aftermarket Conference 2023**, with the theme ‘Driving Service Innovation’. The event, which took place in Brussels on 29 & 30 March, brought together over 180 participants, including top-level speakers from the Commission, Parliament and industry.

In his welcome speech, **CLEPA Secretary General, Benjamin Krieger**, stated: “Consumer confidence is crucial for the acceptance and the deployment of new technologies. This is best achieved by a wide choice of equipped and skilled repairers in the aftermarket ensuring seamless service over the lifespan of vehicles.” The consumer in the centre was also seen as most relevant by **Hasmeet Kaur**, Roland Berger, who shared her thoughts on the ‘Mobility Vision 2040’, in a keynote address.

Mark Nicklas, Head of Unit Mobility at the European Commission’s Directorate-General for Internal Market, kicked-off the second day of the conference with an overview on planned aftermarket-relevant regulations, stating that cybersecurity is essential but will require further regulatory intervention to ensure a level playing field. The audience also took note that the Commission is still planning to develop a proposal for a sector-specific regulation to complement the EU Data Act with regards to the use of in-vehicle data.

Angelica Petrov, Policy Advisor in the office of MEP Alin Mituta, presented the European Parliament’s view on the Data Act. She highlighted the challenges of achieving a balance

between protecting intellectual property rights and trade secrets while allowing for general data sharing in the horizontal regulation, particularly in terms of defining scope of the “data”.



Alexander Brenner from Boston Consulting Group presented the first findings of a joint study with CLEPA on the impact of fleets on the aftermarket business. The study revealed that by 2030, around 15% of the passenger cars will be owned and operated by fleets, with 62% of them as battery electric vehicles (BEV) in the base scenario. The future market volume for repair and maintenance, tires, crash repairs, and accessories, will be determined by the overall percentage of vehicles owned by fleets, as well as the proportion of BEVs within those fleets. The study also analysed various scenarios for passenger cars and included insights on light commercial vehicles, medium- and heavy-duty vehicles as well as trailers.

In the second half of the event, **Damian Dyrbusch**, head of the newly founded Bosch Centre of Competence for Mobility System Architectures, provided insights into the E/E architecture of connected vehicles as part of a broader ecosystem. This led to a panel discussion on the challenges that new technologies pose for the aftermarket. **Eric-Mark Huitema** (AVERE), **Christian Knobloch** (Knobloch & Gröhn), **Stefan von Dalen** (Hella), **Dominik Lutter** (ZDK) and **Hari Ramakrishnan** (FIGIEFA) discussed the future role of OEMs and tech players, and the impact of cybersecurity measures requires from OEMs. The panel also addressed the role of OBD and the relevance of software updates. While the technical capability of software updates was seen as relevant, cybersecurity measures and in-vehicle data access were seen as major competition issues in the aftermarket.

The final part of the event showcased four best practice examples presented by start-ups in cybersecurity, greenhouse gas emission trading, digital car service documentation and advanced driver assistance systems (ADAS).

This was followed by **Hans Bosch**, ANBW, who shared surprising statistics on breakdowns of BEVs, which were found to be higher than those of combustion engine vehicles. **Per Oscarson** and **Petra Bendelin**, both from MEKO, explained how the largest wholesaler in the

Nordic region prepares workshops, mechanics and distribution for the electric vehicle age. This session ended with **Stefan van Dalen**, Hella-Gutmann, introducing solutions for an increasing complexity of service and maintenance.

Frank Schlehuber, CLEPA's Senior Consultant Market Affairs, closed the 14th edition of this conference, commenting, "The aftermarket must prepare for new technologies, new players in the sector and increased fleet business. There are high expectations towards policymakers for a robust regulatory framework to ensure a level playing field, but it is good to see that the sector is already preparing for future challenges. We have seen impressive best practice examples making me confident that the aftermarket will have the strength and creativity to adapt to new technologies."

The next edition of the CLEPA Aftermarket Conference is planned for March 2024.

For more information about this event, please contact [Jose Almeida](#).

About CLEPA

CLEPA, the European Association of Automotive Suppliers, represents over 3,000 companies supplying state-of-the-art components and innovative technologies for safe, smart, and sustainable mobility.

CLEPA brings together over 120 global suppliers of car parts, systems, and modules and more than 20 national trade associations and European sector associations. CLEPA is the voice of the EU automotive supplier industry linking the sector to policy makers.



The automotive sector accounts for **30% of R&D** in the EU, making it the number one investor.



European automotive suppliers invest over **30 billion euros** yearly in research and development.



Automotive suppliers register over **39000 new patents** each year.



Automotive suppliers in Europe generate **1.7 million** direct jobs.

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