



**C L E P A**  
*European Association of  
Automotive Suppliers*

# Aftermarket in a connected World

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# Mobility in a Changing Environment

## Megatrends and Consequences

Urbanization

Ageing population

Emissions

Connectivity



Change of mobility habits

Need for Assistance

Stricter regulations

New technologies and  
new business models



# Mobility in a Changing Environment

## Key Elements and Implications

Electrified

Automated

Connected

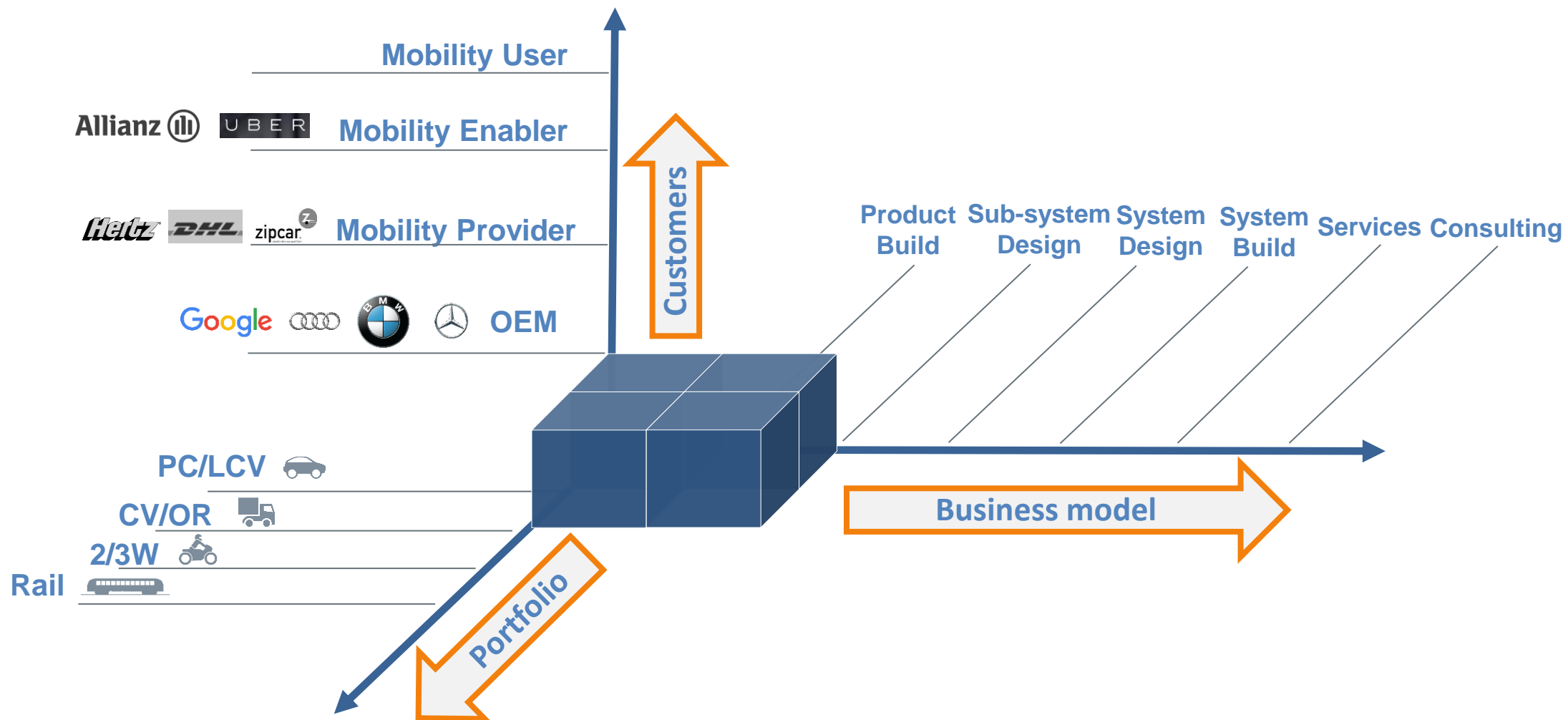


**Access to vehicle data is vital for the Aftermarket**



# New Dimensions of the Mobility Market

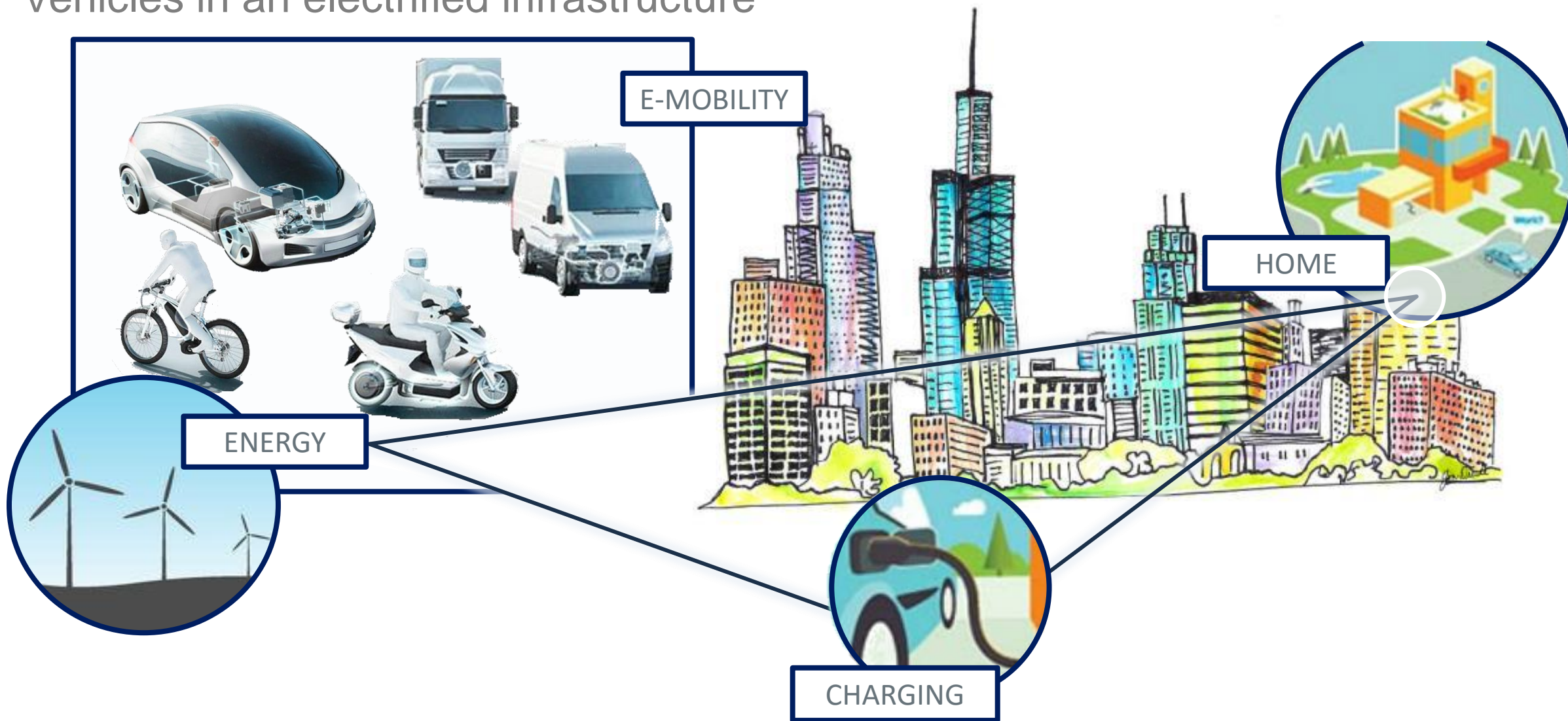
Extended customer base, portfolio and business model





# Electrified

Vehicles in an electrified infrastructure





# Automated

A revolution step by step

## Driving Assistance

To support the driver:

### Automated valet parking

2018



## Highway Assistance - 2018

### Partially Automated Driving

Permanent driver supervision

## Highway Pilot - 2020

### Highly and fully automated driving

Reduced driver supervision

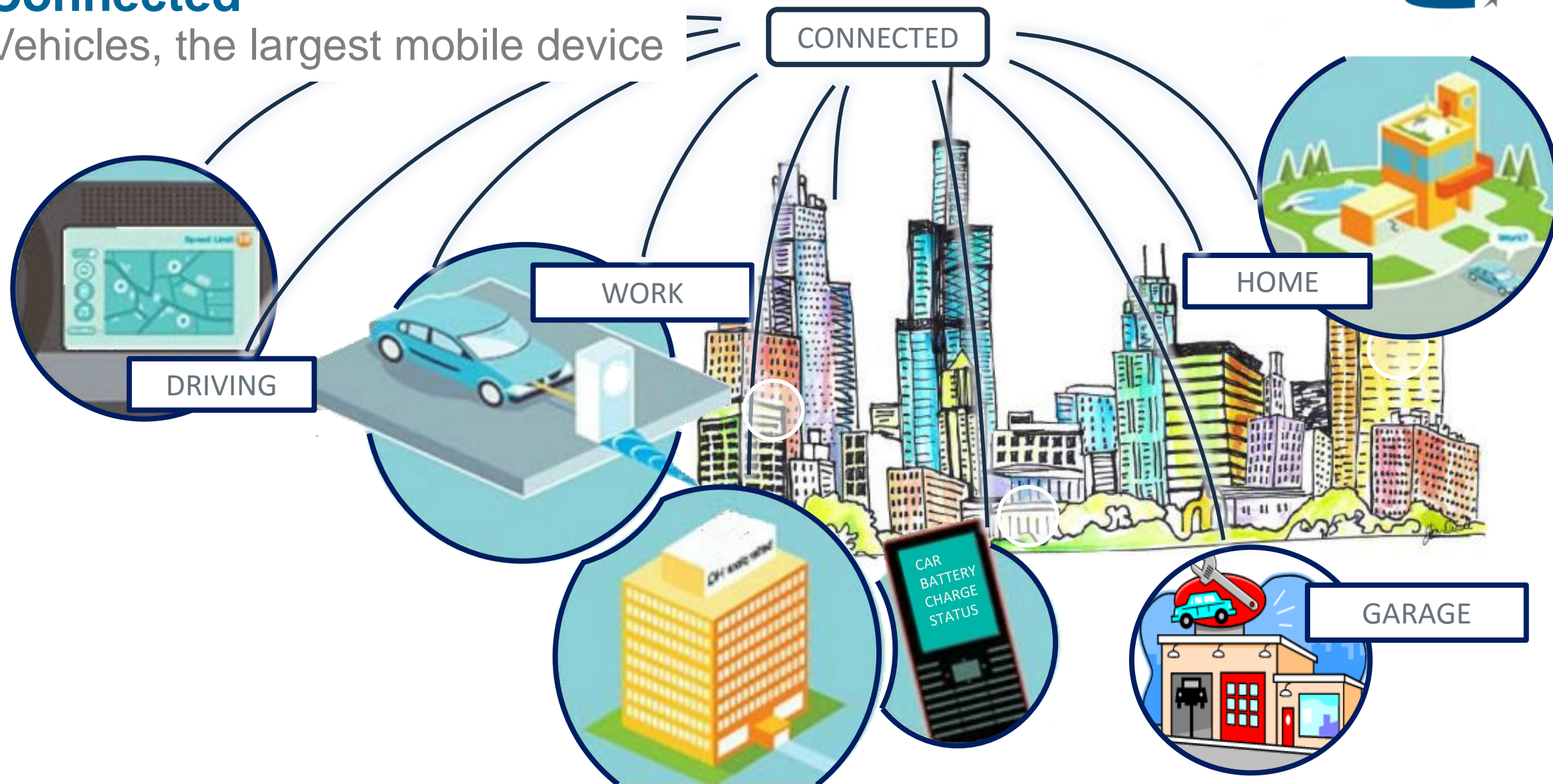
## Auto-Pilot

>2025



# Connected

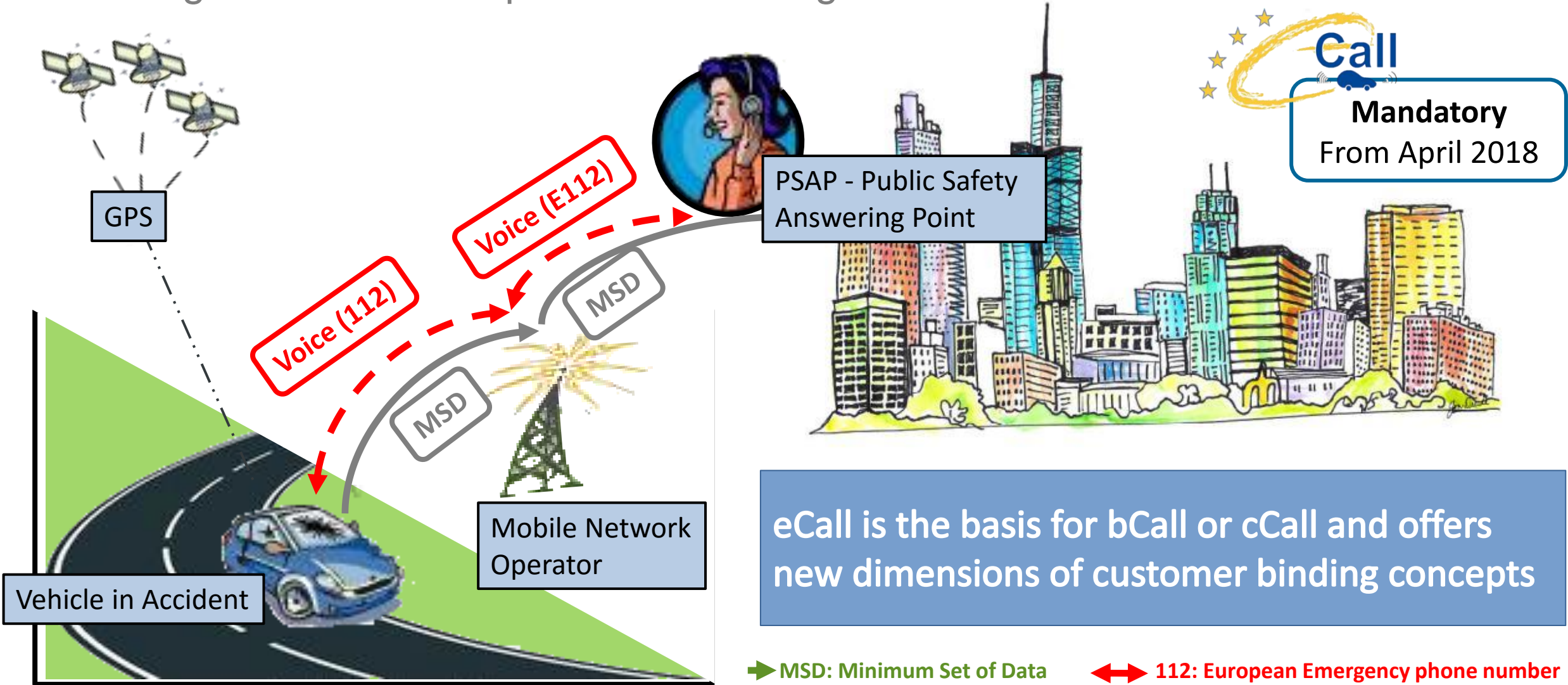
Vehicles, the largest mobile device



# eCall Regulation



The legislation with the potential to change the Aftermarket



eCall is the basis for bCall or cCall and offers new dimensions of customer binding concepts

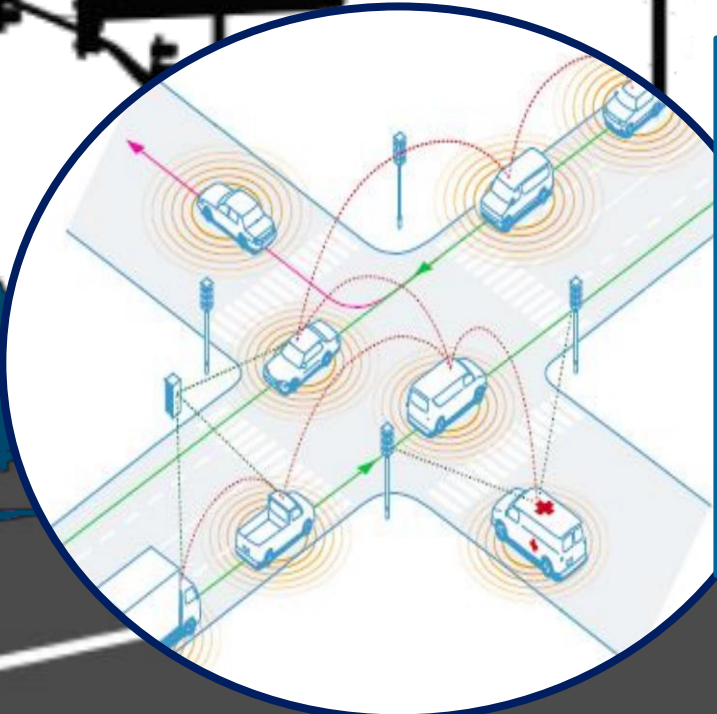
➔ MSD: Minimum Set of Data      ↔ 112: European Emergency phone number



# C-ITS Platform



## Cooperative Intelligent Transport Systems

- 
- A circular inset diagram showing a network of cars on a road. Each car is represented by a blue icon with orange concentric circles around it, indicating a communication range. Dotted lines connect the cars to each other and to roadside infrastructure (represented by blue poles with antennas). The background of the inset shows a road with lane markings and a traffic light.
- Car to Car
  - Car to Infrastructure
  - Car to other parts of the transport network

### Improve:

- Road Safety
- Traffic flow
- Reduce environmental impact

**January 2016 Final Report**  
For the C-ITS Platform



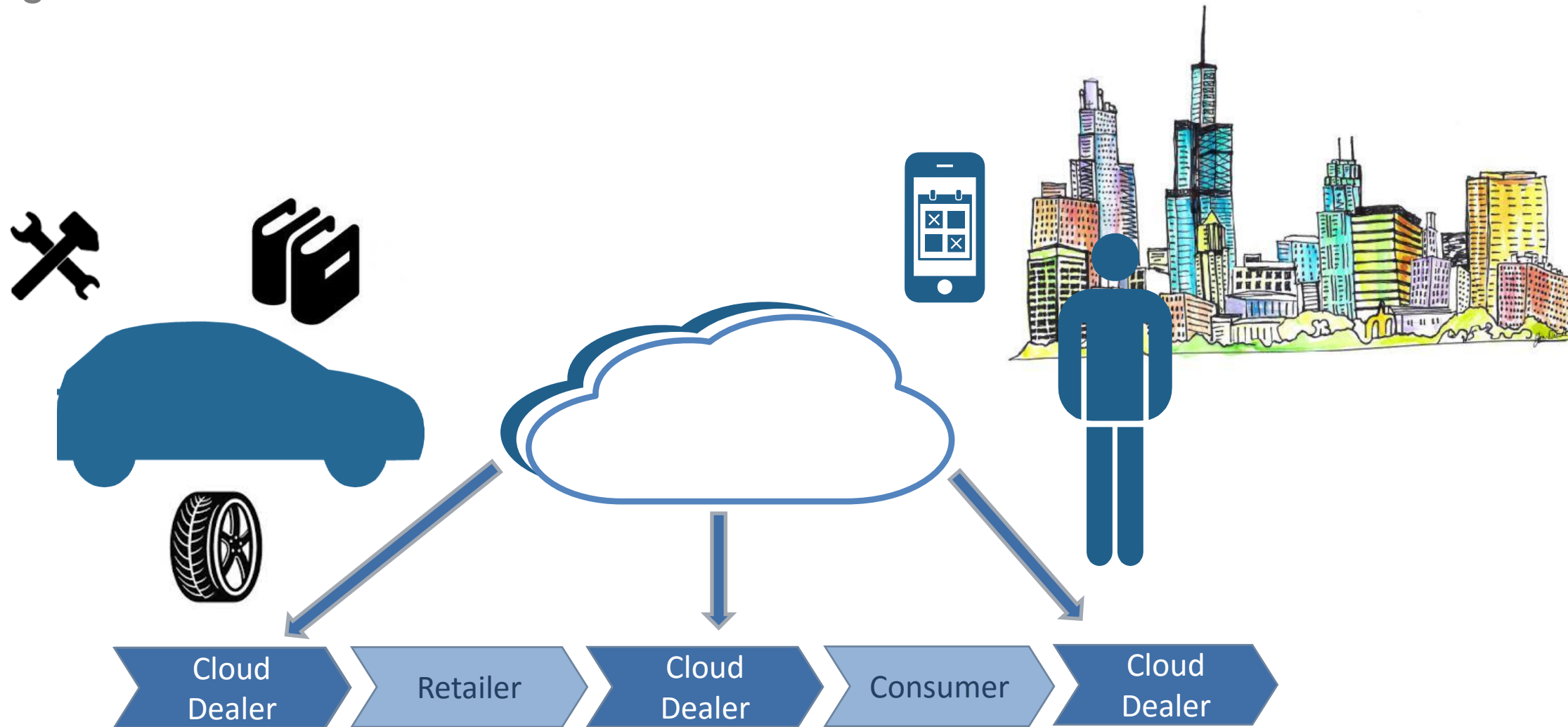
**Mid-2016 Master Plan**  
For deployment of C-ITS





# The Impact on the Aftermarket

Change in the value chain





# CLEPA Position Paper on Telematics

## Open Telematics Platform

CLEPA supports eCall legislation (EU) 2015/758.

CLEPA supports an interoperable, standardized and secure in-vehicle open access platform for services and future use cases.

Consumer must have the freedom to choose service providers and parts and applications been installed in the vehicle.

Fair competition between OEM and IAM must be ensured.

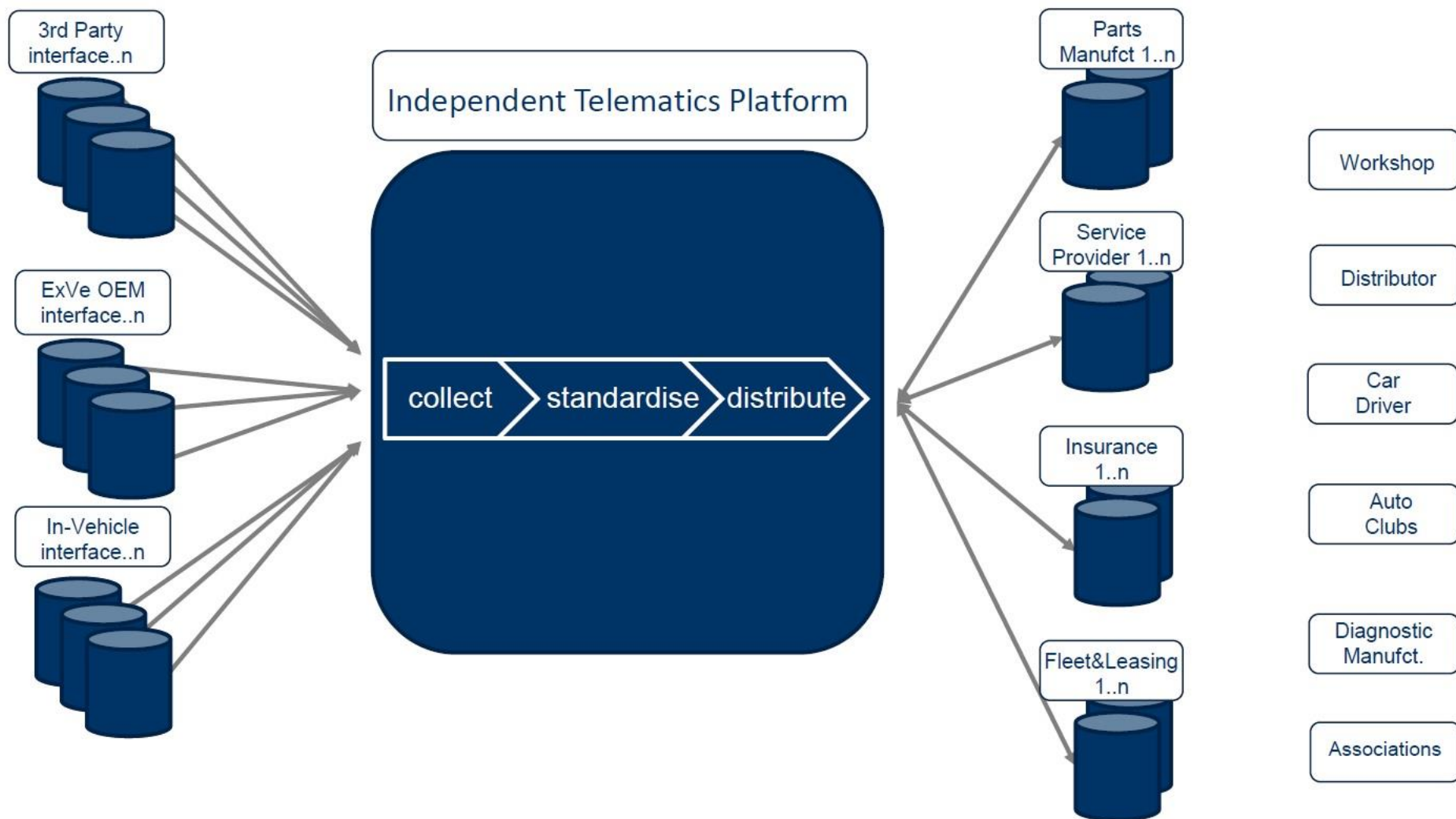
Privacy and data protection must be ensured.



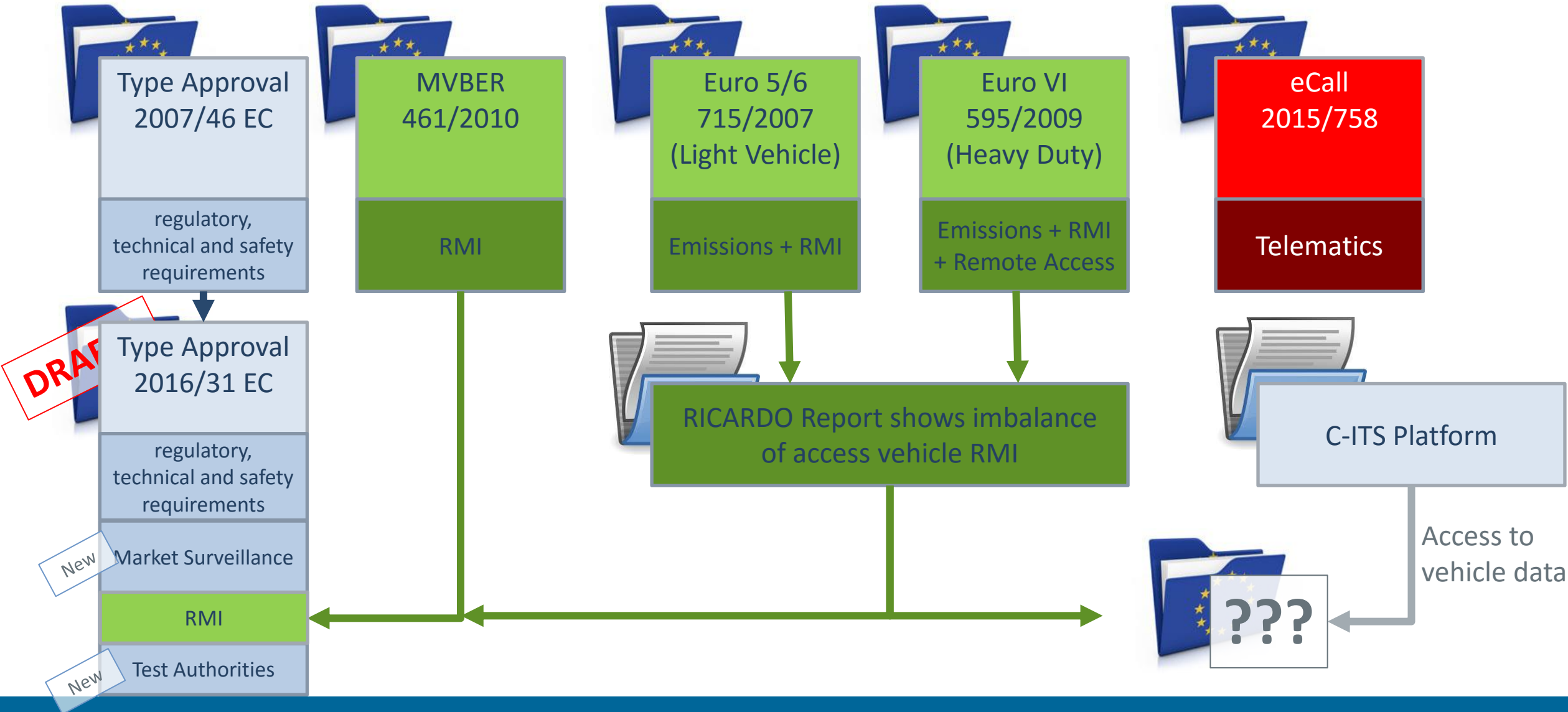


# The proposed Solution:

## Telematics Raw Data Platform: CARUSO



# The legislative Framework



# The new Type Approval Regulation

## CLEPA Position on Aftermarket Topics



Remote diagnostic support for IAM to be provided for PC, LCV and HCV

OBD and repair information should be provided «machine-readable»

Re-programming standards for PC, LCV and HCV as part of type approval

Fair competition between OEM and IAM must be ensured.

CLEPA requests approval and authorization guidelines for independent operators to access security-related vehicle OBD and vehicle RMI.

CLEPA supports a mandate to CEN for a standardized high speed protocol for vehicle communication.



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**THANK YOU FOR YOUR ATTENTION**

**Frank Schlehuber**  
**Director Aftermarket Department**