The deployment of automated mobility services

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Suppliers View

- Global value of 400 bn EUR for spare parts (EU: 123 bn EUR)
- Stagnating market for wear and tear parts
- New market for mobility services of 34 bn EUR in 2025
- Intermediary power—less people decide about larger volumes
- Technology favours OEM (software, complexity, connectivity)
- Access to data = Access to market
- Aftermarket -> Mobility service over the vehicle lifetime
Aftermarket – Transformation Drivers

**AREAS**

- **VEHICLE TECHNOLOGY**
- **OWNERSHIP MODELS**
- **DISTRIBUTION CHANNELS**

**TRENDS DRIVING CHANGE**

**Short term (0-5 years)**
- Connectivity
- Softwarization
- Mobility services & new ownership models
- Intermediary power
- Independent wholesale consolidation
- Online platforms
- Value chain integration

**Medium term (5-10 years)**
- Electric vehicles (EV)
- Autonomous vehicles

**Long term (+10 years)**
- 3D printing

**KEY TRENDS BEFORE 2025**
Connectivity makes the Difference

Results from Studies

• 20% of revenues of an OEM could come from mobility and connected services (Deloitte, 05.2017)
• «Access to car-generated data» is one of six top trends expected to change the aftermarket game (McKinsey, 06.2017)
• New ownership models, access to fleet business, mobility as a service are key to participate in the market growth (QVARTZ / Stern Stewart & Co, 09.2018)
• The access to data model should *mitigate the risk of concentration of power with one group of market participants* and prevent the situation of a distorted market to the detriment of consumers before competition law can be applied. (TRL, 09.2017)
• Policy makers could consider measures to promote more competition in these markets and *reduce the OEMs monopolistic hold on car data* and service delivery channels (JRC, Digital Economy Working Paper 09.2018)
Data and Connectivity based Services

Examples for Mobility Services – Just the Beginning

- Predictive maintenance services
- Parts design optimisation
- Driver style surveillance (insurance use case)
- Vehicle functions on demand (aux. heating, engine power, ..)
- Software updates over the air
- Fleet management services
- Smart access (delivery services, car sharing, ..)
- Remote diagnostics
- Concierge services (parking, payment, ..)
- Information and entertainment offers
- ...
Connectivity Technologies

Retrofitted Black box

- Creates own data with sensors and requires only electric power

Retrofitted Dongle on the OBD Port

- Uses available data on the diagnostic port

Extended Vehicle Solution (NEVADA)

- ExVe = Vehicle + OEM Backend Server
- Neutral Server
- Service provider
- Roadside assistance
- TIER 1,2,3
- Insurance
- SME
- Available data depend on OEM
- B2B Agreements

Direct Access

- Direct bi-directional communication with a vehicle via a secure vehicle interface (SVI).
- Real-time access to all data
- Full access to vehicle resources (e.g. display, data processing) via an On-board Telematics Platform (OTP)

Requires design changes by OEM!