

## **EP Public Hearing: Clear Internal Market Rules for Mopeds, Scooters and Motorcycles**

**FIGIEFA presentation**  
Access to repair and maintenance  
information for independent operators



# FIGIEFA – We Maintain Competition

## FIGIEFA



### **International federation of automotive aftermarket distributors**

Founded in **1956**

Gathers **26 national trade associations** from 23 countries in Europe

Represents the interests of both independent **spare parts distributors** and independent repairers organised in **repair chains**.

### **Our mission**

to safeguard **free and effective competition** and **fair access to spare parts** and **repair and maintenance information** in the European aftermarket

# Overview of the Motorcycle/Scooter/Moped Market

## Key market figures

**33 million units** in use (2008)

Regular mean of transport for **30 million EU citizen**

In 2006, 6 countries represent 90 % of total PTW sales (ES, FR, IT, DE, GR, UK)

**6 main players represent 2/3** of the total market

(Piaggio Group, Yamaha, Honda, Suzuki, Peugeot, Kymco)

**37.000 points of sales/services** accounting for

**2/3 of sector employment** within the EU (150.000 employees)

The Aftermarket represents **72 % of the total sector turnover**

## Current trends

**Cities congestions** create a **growing demand** for urban PTWs

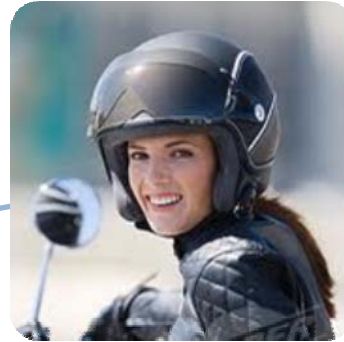
**Introduction of OBD systems** even on small PTWs means

**more complex repair and maintenance**

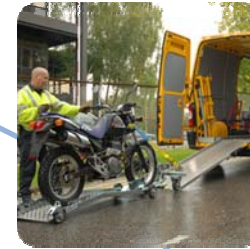


# The Aftermarket Chain

Multi-brand Repairers



Roadside Rescue Services

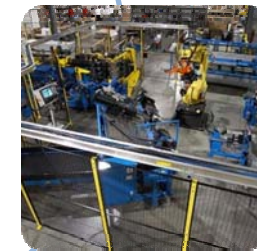


The aftermarket is  
**a chain of operators**

Each of these actors play and  
essential part in the proper  
repair and maintenance of  
**PTWs**



Providers of Technical  
Information



Parts Manufacturers



Parts Distributors



Tools Manufacturers

# Modern Aftermarket Services at a glance

Due to advances in vehicle technology, PTWs are becoming computers with 2 wheels

On a modern PTW, the repair and maintenance processes include:

- ▶ Unequivocal **vehicle identification**
- ▶ **Diagnosis** of the vehicle
- ▶ Due analysis of problem with **up-to-date repair expertise**
- ▶ Unequivocal **parts identification** and ordering of replacement products
- ▶ **Correct fitting** of new mechanical parts, electronic units and other components
- ▶ **Software update/Re-intialisation/re-setting** of electronic components and of the vehicle



# Key elements: OBD and Repair and Maintenance Information (RMI)

## For all these steps:

- ▶ **Access to technical information** is critical
- ▶ Need to rely on **standardised diagnostic information** from the OBD system
- ▶ Need to use a **multi-brand diagnostic tool**

This access to OBD and RMI is needed by **all multi-brand aftermarket operators**

# In more details: 4 Keystones for modern repair and maintenance

## Repair information



## Multi-brand tools



repair and maintenance

## Spare parts

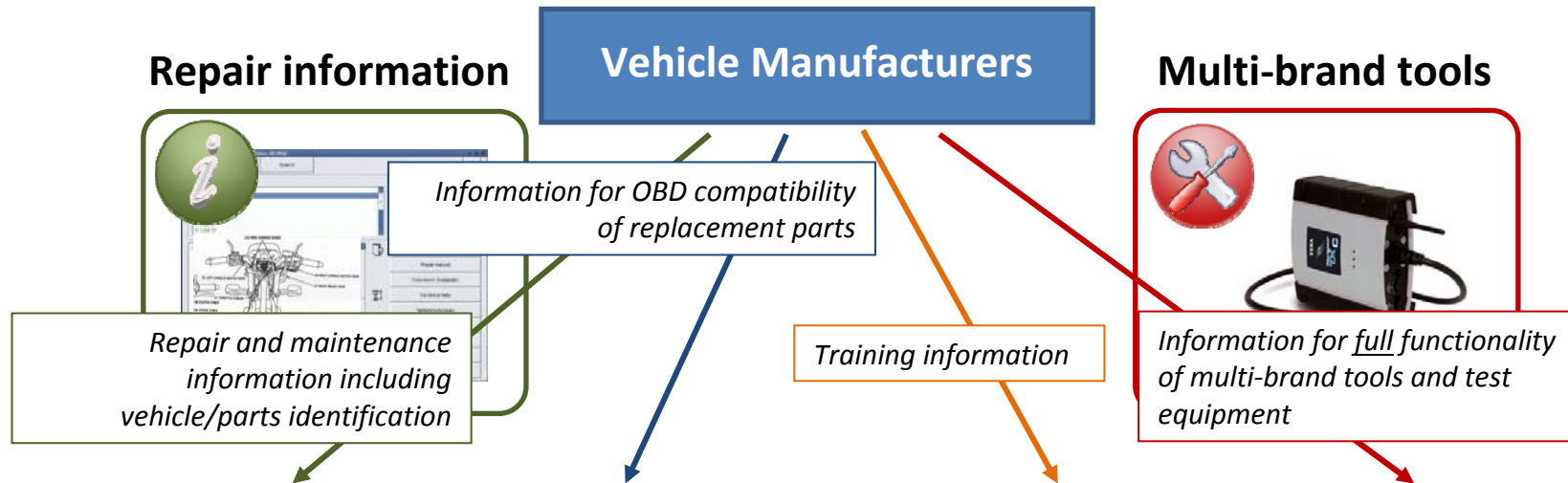


## Training



# In more details

## 4 Keystones for modern repair and maintenance



### Spare parts



### Training



It is therefore essential that **all independent operators** have **access to OBD and Repair and Maintenance Information**



# Rationale behind the Draft Regulation

## Why are the provisions on access to repair and maintenance crucial?

- ▶ To ensure vehicle **safety** and **environmental compliance** from day one and **throughout the vehicle life-cycle**
- ▶ To maintain **effective competition** in the aftermarket to the **benefit of EU consumers**
- ▶ To achieve **EU legislative/policy consistency** in the Automotive sector

# Implementation of the Access to RMI provisions

## Timing/feasibility - January 2013

**More than 90%** of the market is held by **large** or **very large industrial players**

(e.g: Piaggio group, Yamaha, Honda, Suzuki, Peugeot, BMW, Triumph, KTM...)

- ▶ **All manufacturers** already **apply the principle of Access to RMI** for the members of their **own network**
- ▶ These **strong business entities** should be able to handle the access to RMI requirement
- ▶ There is **no immediate standardisation** requirement (information should be provided in a usable manner)
- ▶ If the information is not available, **VMs are granted a 6 months** period starting on the date of type-approval to comply

# FIGIEFA's opinion

## FIGIEFA's opinion on the EC legislative draft

### Overall positive

The draft provisions on repair and maintenance information **fill the legislative gap** and are **similar to Euro 5/6 and Euro VI provisions**

### Improvements yet needed

**Updates** are suggested in light of technological advances, market developments, and practical experience with access to technical information since 2006/2007

## To Conclude

All we ask for is that the independent and multi-brand operators continue to provide consumers with quality services and products on a **fair and effective level playing field**.

**Thank you for your attention.**