

# **FIGIEFA Presentation**

**What significance does our work have for the free industry and the aftermarket?**

**Automessen, 5 February 2025**

# Who is FIGIEFA

- European federation and political representative in Brussels of the Independent Parts Distribution
- 19 national trade associations and 5 International Trade Groups

## Our mission:

- Free competition & strong Single Market
- Ensure European & International **legal framework conditions for fair access** to parts, tools, data, technical information for your business.

## Associations:



## International Trade Groups:



# What is our daily work?



**Intelligence** gathering: Screening new draft legislation & responding to Commission consultations

**Interdisciplinary analysis** with political, technical and legal team, and with FIGIEFA Working Groups



**Coalition building** with AFCAR and other stakeholders – **Advocacy** for our industry

# AFCAR – Alliance for Freedom of Car Repair



- 7 independent associations
- Goal: Fair competitive conditions for the automotive aftermarket
- FIGIEFA holds the AFCAR Coordination Secretariat
- Voluntary association, and therefore an activity based on trust

**ADPA** European Independent Data Publishers Association  
**AIRC** International Association of Body Repairers  
**CECRA** European Council for Motor Trades and Repairs  
**EGEA** European Garage Equipment Association  
**FIA** Fédération Internationale de l'Automobile, Region I  
**FIGIEFA** European Federation of Automotive Aftermarket Distributors  
**LEASEUROPE** European Leasing and Rentals Industry

# Comparison between FIGIEFA, AFCAR & ACEA

Number of people officially registered at EC for lobbying activities (between 10% and 100%)



\*includes all AFCAR Members full teams, including people not working on IAM issues



Source: EU Transparency Register

# EU Regulation: Achievements and Challenges for 2024- 2029

I

*(Legislative acts)*

## REGULATIONS

REGULATION (EU) 2018/858 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL  
of 30 May 2018

on the approval and market surveillance of motor vehicles and their trailers, and of systems, components and separate technical units intended for such vehicles, amending Regulations (EC) No 715/2007 and (EC) No 595/2009 and repealing Directive 2007/46/EC

*(Text with EEA relevance)*

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty on the Functioning of the European Union, and in particular Article 114 thereof,

Having regard to the proposal from the European Commission,

After transmission of the draft legislative act to the national parliaments,

Having regard to the opinion of the European Economic and Social Committee <sup>(1)</sup>,

Acting in accordance with the ordinary legislative procedure <sup>(2)</sup>,

Whereas:

- (1) In accordance with Article 26(2) of the Treaty on the Functioning of the European Union (TFEU), the internal market comprises an area without internal frontiers in which the free movement of goods, persons, services and capital is to be ensured. Internal market rules should be transparent, simple, consistent and effective, thereby providing legal certainty and clarity for the benefit of businesses and consumers.
- (2) To that end, a comprehensive EU framework for the approval of motor vehicles and their trailers, and of the systems, components and separate technical units intended for such vehicles, was established by Directive 2007/46/EC of the European Parliament and of the Council <sup>(3)</sup>.
- (3) In 2013, the Commission carried out an assessment of the Union legal framework for the type-approval of motor vehicles and their trailers, and of systems, components and separate technical units intended for such vehicles which showed that the framework established by Directive 2007/46/EC is appropriate for achieving the main goals of harmonisation, effective functioning of the internal market and fair competition, and concluded that it should therefore continue to apply.

# FIGIEFA worked hard in the last year to:



- Renew & (some) update Motor Vehicles Block Exemption Regulation (MVBER) 2023-2028



- Leave footprint on the Data Act



- Obtain 'Freedom of Repair Clause' for design-protected body-related parts throughout the EU



- Not achieved: sector-specific legislation on “access to in-vehicle data, functions & resources”

# MVBER - Achievements

Thanks to FIGIEFA's work, MVBER extended for 5 years, until 2028!



Access to and trade of T1 original & matching quality spare parts



Access to technical information (**new: parts activation codes + vehicle data included**)



Right to servicing & repair in the IAM during the vehicles' warranty period



# The Data Act (applicable as from 8/2025)

Determines the rights of Users (consumers & business users):

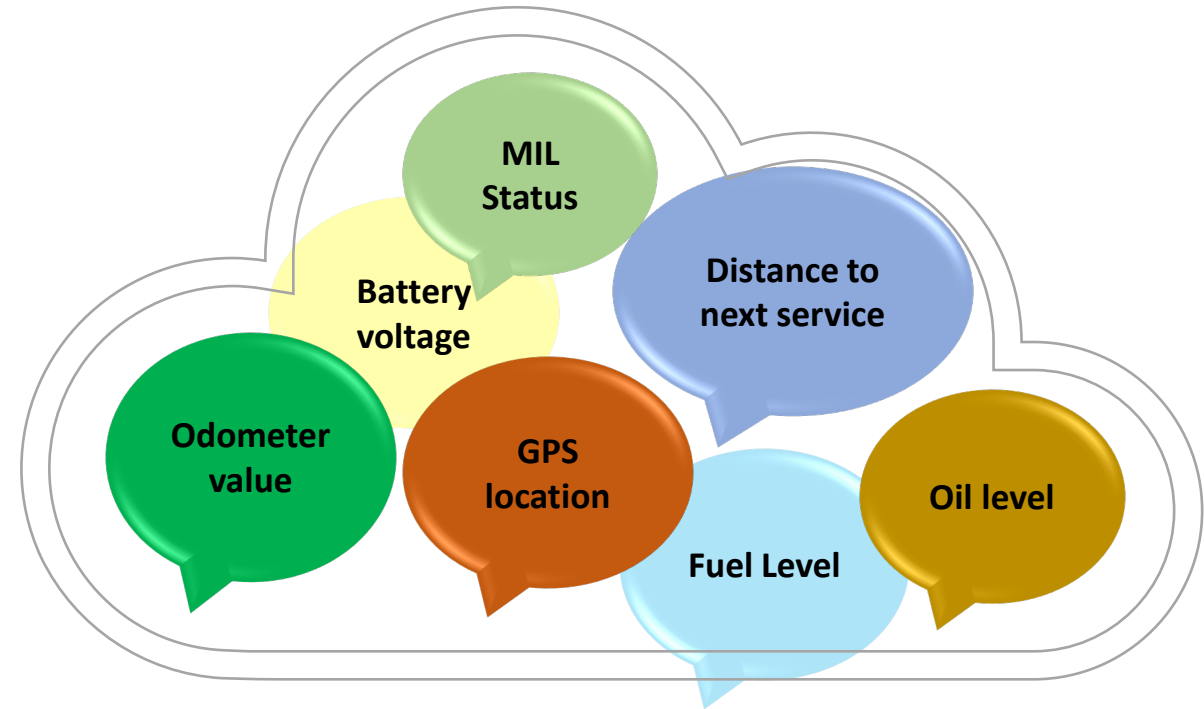
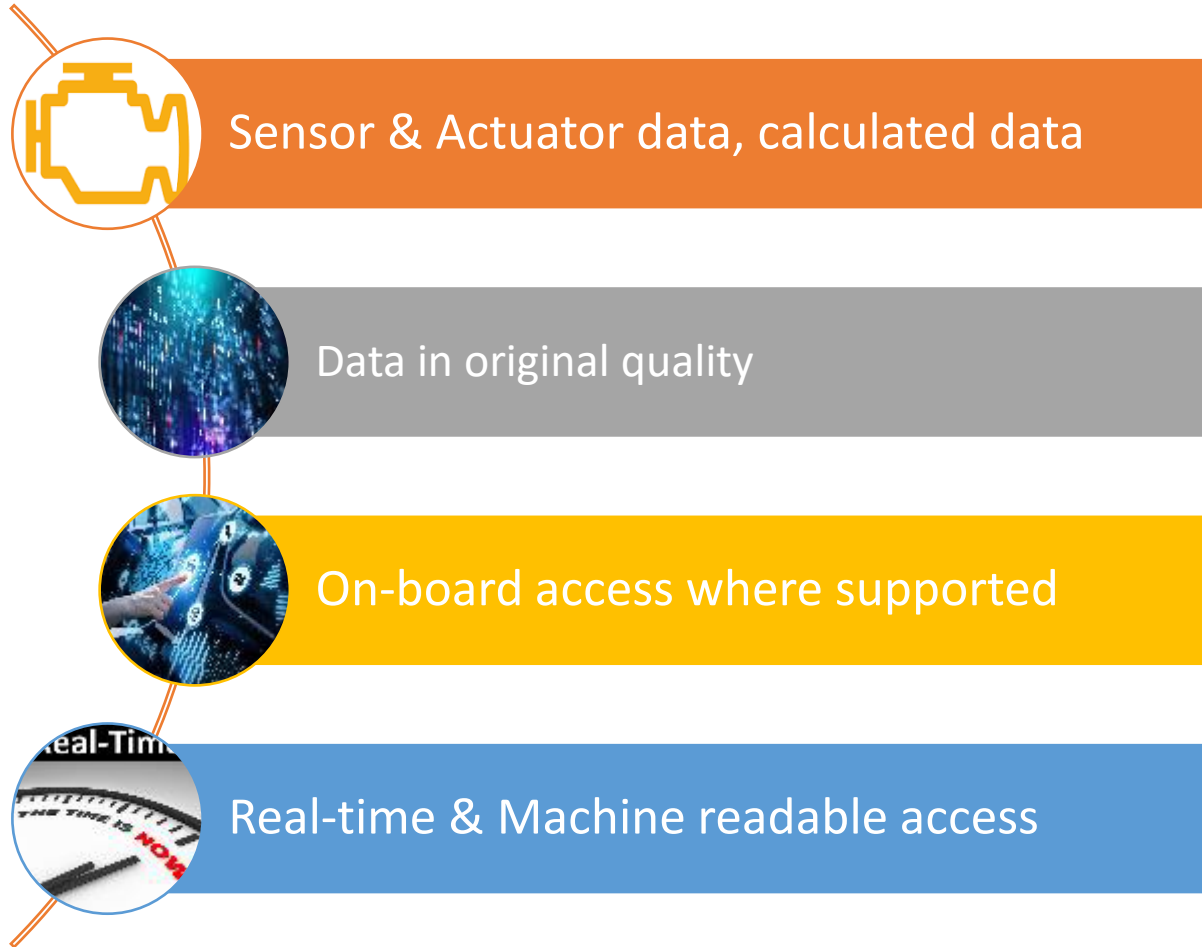
- Access to data generated by the use of their connected products
- Right to transfer this data to a third-party of choice

Horizontal legislation: applies to all industrial sectors

1st step towards access to machine-generated vehicle data



# What to expect?



# However the Data Act is not enough

- Too general for specifics of the Automotive sector
  - Uncertainty about certain high-value data sets (e.g. Diagnostic Trouble Codes)
  - Only about “**data**”, we also need access to **vehicle functions & resources** (access to dashboard & HMI)
- **What is FIGIEFA trying to achieve?**
- Specific legislation under EU Vehicle Type-Approval
  - Ongoing campaign since 2016!



# Design protection - From patchwork of national rules...



For 30 years, situation was NOT harmonised in the EU, resulting in a patchwork of different national legislations



No free competition, no free trade in visible 'must match' spare parts (i.e. body parts, windscreens, lightings)



This situation resulted in many legal proceedings against honorable businessmen (wholesalers, workshops, suppliers).

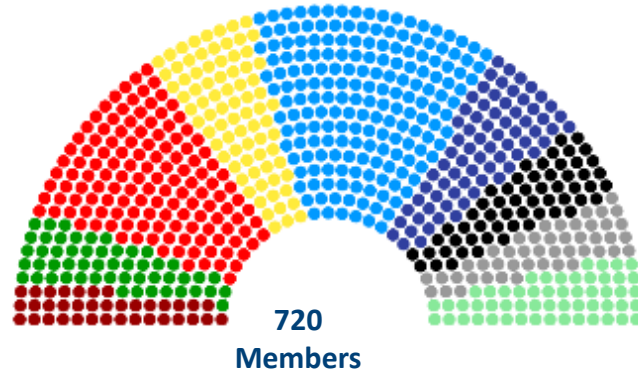
# ...to harmonisation & EU-wide Repair Clause (RC) (as from 2027/2032)



# New EU Mandate & Priorities for 2024-2029



# New Brussels macro-political Environment



2024-2029

## European Parliament

- **Grand coalition** like the last term (EPP, S&D)...
- ... **weakened partners** (Renew, Greens) so more fragile...
- ... confronted to **stronger conservative-right / right-wing forces** (ECR, P/E, ESN).
- High focus on industrial policy, defense, migration, business interests overall



2024-2029

European Commission  
Ursula von der Leyen II

- **Continuity in objectives:** decarbonisation and digitalisation still high on the agenda.
- Focus on the **implementation** and fine-tuning of agreed rules.
- A more pragmatic, **business-friendly** approach with a strong aim to improve European competitiveness – for European ‘Industrial champions’.

# Letta and Draghi Reports - Sources of political influence



## Enrico Letta: “Single Market & innovation first”

- Report on the EU Single Market ordered by the European Council.
- “The EU Single Market is Europe’s best asset for growth”



## Mario Draghi Report on European competitiveness

- Report on European competitiveness ordered by Commission’s President in view of getting justifications for new ambitious EU reforms
- Focus on the increased competitiveness gap to the benefit of other world’s regions (in particular the USA and China),



# Repercussions on the Automotive Sector



Common perception: **“A European industrial giant too big to fail”**

- The automotive ecosystem is seen as one of Europe’s top manufacturing sectors, providing jobs and growth.
- Competitiveness of the production process in the centre of the attention
- EU Goal: keep the existing industrial installations in Europe.



## Risks

- **EU policies & legislations designed unilaterally for vehicle manufacturers.**
- EU helping **European industrial champions’** grow, especially large manufacturers.
- Confusion between reducing **‘regulatory burden’** and **‘market de-regulation’**.
- **Independent aftermarket operators could be considered as an extension of the growth generated by vehicle manufacturers.**

# The way forward

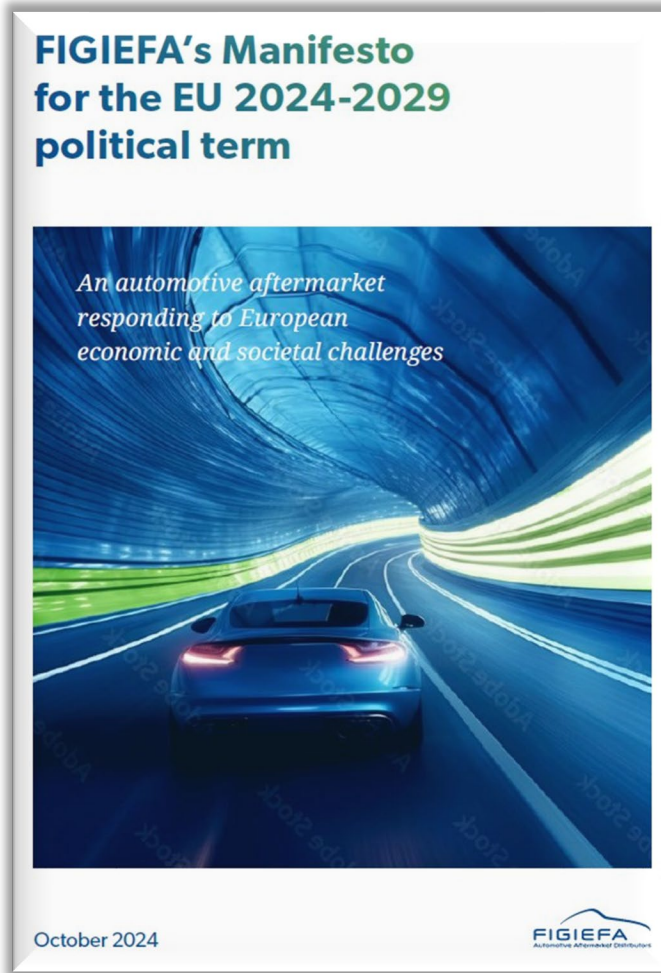
Demonstrate that our Independent Aftermarket sector is integral part of the automotive industry.

We contribute substantially to Europe's growths & innovation, competitiveness, social welfare and affordable mobility!

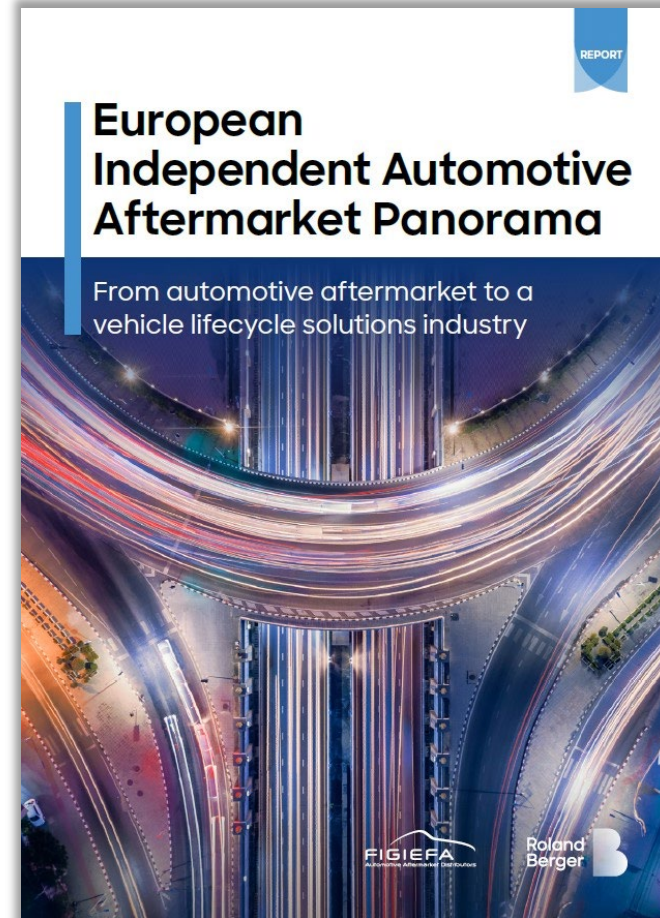
➔ **The EU must include us as 'Vehicle Lifecycle Solutions Industry' into the industrial action plan for automotive sector 2024-2029**



# The new FIGIEFA tools



FIGIEFA Political  
Manifesto



Roland Berger/ FIGIEFA  
Study 'IAM Panorama'



Berylls/CLEPA/FIGIEFA study

**Read more!**

**SCAN**



**Download**  
complete study

**Also available at**  
**[www.rolandberger.com](http://www.rolandberger.com)**

# NEW STUDY: COMPETITIVENESS IN THE AUTOMOTIVE AFTERMARKET

beryllis  
by AlixPartners

In cooperation with

FIGIEFA  
Automotive Aftermarket Distributors

CLEPA  
European Association of Automotive Suppliers

## THE GOAL:

**Predict** the **evolution of the aftermarket** and understand, if and how **key influential factors (KIF)**, are capable of **changing the dynamics in the European aftermarket.**



Germany



France



Italy



Spain



UK



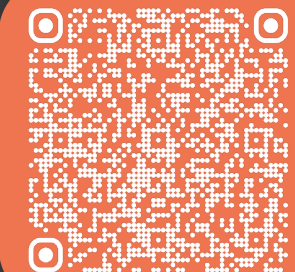
Poland



Norway



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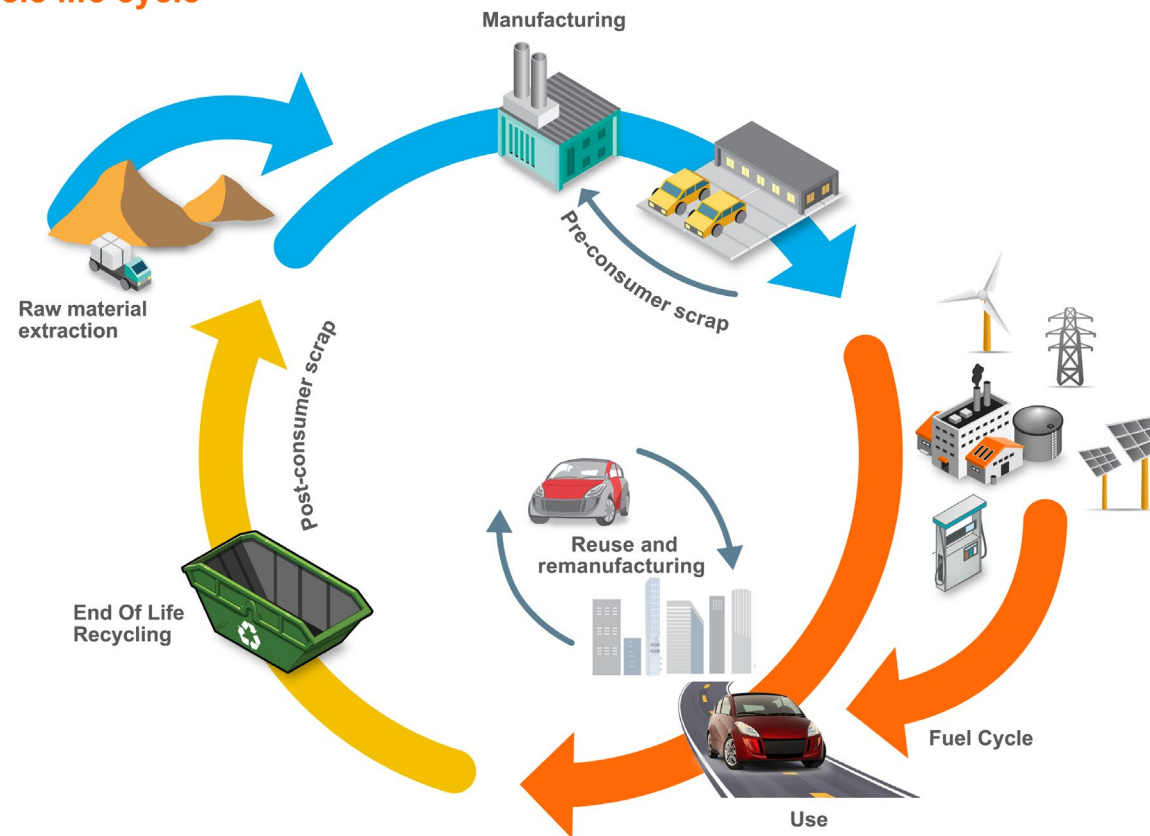
# Our Efforts and Priorities on Sustainability Issues



# Some Initiatives and Regulations that FIGIEFA is working on

FIGIEFA is working to position our sector as a **'lifecycle vehicle'** industry, taking care of the entire life of the vehicle with parts and services that guarantee a sustainable, secure and affordable car mobility.

Vehicle life cycle



# Repairability

FIGIEFA is pursuing a new “**repairability by design**” requirement for vehicles and their components

- Situation: New vehicle production techniques can impede their repairability. For example, **giga-casting** consists in building large single-block vehicle parts, thus hindering the replacement of individual components. **Electric vehicles are increasingly difficult to repair**, as battery cells are sometimes sealed or glued.
- Solution: The EU should improve a new “repairability by design” requirement for all vehicles and their components, including electric vehicles and traction batteries, within sector-specific rules for the automotive aftermarket (e.g ELV or Type-Approval legislations).





## End of Life Vehicles Directive

- FIGIEFA is working to secure that this regulation will allow independent operators to get access to the necessary information for circularity applications (part removal, reusing, remanufacturing, etc.)
- Also, to secure ‘repairability’ and recycling and repurposing of batteries, beyond the EU Battery Regulation.

## Vehicle price versus battery price of selected vehicles:

	 VW ID.3 (82 kWh)	 MG Marvel R (70 kWh)	 Mercedes EQC (80 kWh)	 Tesla Model 3 (78,1 kWh)
Vehicle price	39.995 €	39.487 €	59.900 €	35.705 €
Battery (new)*	23.600 €	53.121 €	41.863 €	11.597 €
Battery* (exchange part)	-	-	29.934 €	5.798 €
Battery module*	2.600 €	6.502 €	-	-
Battery housing*	2.117 €	4.565 €	-	-

Source: KTI \* taxes are not included – 2024.08.05 German market

Many thanks for  
your attention!

[www.figiefa.eu](http://www.figiefa.eu)

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