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# THE AFTERMARKET TELEMATICS DEBATE: DATA SECURITY VS. ACCESS

BY BRIAN ALBRIGHT | Correspondent

As telematics systems become part of, and evolve into, a “connected car” ecosystem in new automobiles, consumer privacy and technology security advocates have begun ringing alarm bells about the new vulnerabilities these systems represent.

A mix of telematics and other types of connectivity solutions have emerged – dongle-based third-party systems, usage-based insurance (UBI) solutions, smartphone-connected systems, and increasingly advanced (and pro-

prietary) OEM systems. If not properly secured, these systems could be used by hackers to gain access to drivers’ personal information or payment data, or (in a worst-case scenario) gain control of systems within the vehicle itself.

“This isn’t just security on a phone connected to a vehicle, but the security of the over-the-air updates the manufacturer issues, or security of the data being collected when the car transmits

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## Analysis by market

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**Telematics:** Consumer Electronics Show spans telematics, ADAS news.

### TECHNOLOGY

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## NACE Automechanika Atlanta

### COMMITMENT TO TRAINING

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**The next generation:** Streamlined apprentice regulations from Department of Labor might help fill aftermarket industry job openings.

AFTERMARKET BUSINESS WORLD (Digital ISSN 1938-0593) is published 12 times yearly by UBM 131 W First St., Duluth MN 55802-2065. Subscription rates: digital only \$65 for 1 year.

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## Opinion



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# Data security vs. access



Vehicle systems could be used by hackers to gain access to drivers' personal information.



to the cloud,” says Christina Segal, vice president and general manager of connected vehicle systems at Honeywell. Honeywell recently partnered with LG Electronics to develop a cybersecurity solution for connected vehicles. The solution could detect anomalies that indicate an intentional hack of a vehicle while protecting in-vehicle network traffic.

Automotive OEMs are increasingly using security concerns as a justification for further lock down of their own telematics systems and access to vehicle data via OBDII ports. In the “Cybersecurity for Modern Vehicles” guidance that the National Highway Traffic Safety Administration (NHTSA) issued recently, limiting third-party device access to vehicle systems was listed as a best practice.

That type of limitation is a threat to aftermarket companies that want continued access to vehicle data, and worry that OEM telematics systems will increasingly be used to control vehicle data and drive more repair business to dealerships.

The Auto Care Association and other industry organizations are working together to devel-

op alternatives that would ensure aftermarket access to vehicle data.

For example, the industry successfully lobbied to have language supporting open access inserted into the AV START Act, a bill targeted at promoting safe development of self-driving cars. Senator James Inhofe (R-Okla.) added an amendment to the bill that requires the Department of Transportation to convene a federal advisory committee to provide recommendations on “with respect to the ownership of, control of, or access to, information or data that vehicles collect, generate, record, or store in an electronic form that is retrieved from a highly automated vehicle or automated driving system.”

“We’re hoping that the bill can go out without objection,” says Aaron Lowe, senior vice president of government affairs for the Auto Care Association. “The Inhofe amendment is not in the House version of the bill, though. What the amendment does is begins the discussion of how consumers can control access to data.”

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# EV training plugs into rising U.S. PURCHASES OF ELECTRIC CARS

By **JAMES E. GUYETTE** | News Correspondent

**M**indful of a steadily growing influx of hybrid and plug-in electric vehicles, governmental and private-sector educators are expanding the amount of available industry EV training to meet the demand for knowledgeable parts and repair personnel.

Numerous courses already are available, and new programs continue to be developed as EVs become more prevalent and previously new cars come off warranty.

Backed by the Bill & Melinda Gates Foundation's OPEN+ Platform (Open Professionals Education Network) and the U.S. Department of Labor's Trade Adjustment Assistance Community College & Career Training (TAACCCT) program, the National STEM Consortium (NSC) is a collaborative effort among 10 colleges in nine states to create a series of curriculum offerings that include comprehensive EV training.

With funding from the National Science Foundation, the Center for Advanced Automotive Technology (CAAT) – a partnership between Michigan's Macomb

Community College and Wayne State University – is among more than 40 Advanced Technological Education Centers located throughout the country.

In California, where EVs currently comprise about 5 percent of the state's car parc (No. 1 in the U.S. with ambitious future growth goals promulgated by the governor's office), the Cleantech Institute's 16-week Certified Electric Vehicle Technician Training Program (CEVT) consists of instruction covering:

- Introduction to Advanced Vehicle Technologies
- Development of Electric Vehicles
- High Voltage Electrical Safety
- High Voltage Vehicle Safety Systems
- Hybrid engines
- AC Induction Electrical Machines
- Permanent Magnet Electrical Machines
- Power Inverter Systems
- Electric Circuit systems
- Electric Propulsion Sensing Systems
- DC-DC Converter Systems
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- Energy Management Hardware Systems

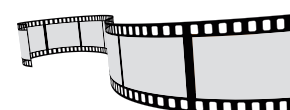
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## ASE GUIDES | QUESTION OF THE MONTH

The three most common types of springs used in suspension systems are:

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- B. hairpin, tension and compression
- C. compression, rebound and tension
- D. leaf, coil and torsion bar

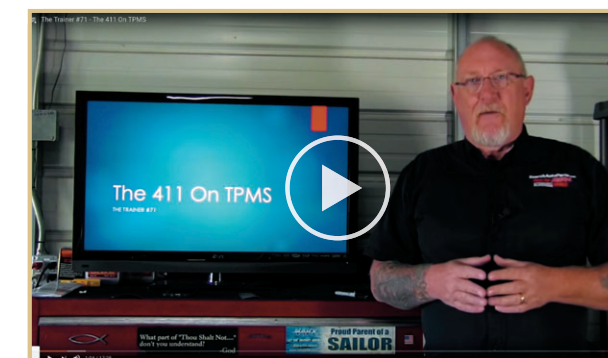
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**In the Workshop #27 – Good news for diesel techs**



**The Trainer #71 – The 411 on tire pressure monitoring systems**

# A practical guide **TO TPMS**

By **VANESSA ATTWELL** | Contributing Editor

**T**ire pressure monitoring systems (TPMS) have become easier to work with since they were introduced a few years back. Not only is it difficult to work around or “fool” a TPMS system (for whatever reason) but leaving the MIL illuminated isn’t just annoying – it may actually cause problems for customers because TPMS is a safety-related vehicle system that shouldn’t be disabled.

Even though TPMS systems have improved and become easier to service, it still takes practical experience and knowledge to keep work problem-free and profitable.

In particular, it’s important to know about the things that can make a big difference when servicing the systems such as how to program replacement sensors quickly and effectively and also knowing if the system will need anything done after a routine wheel rotation or general service – and if special tools to service the system are required. Guessing incorrectly can cause expensive problems.

Additionally, understanding how to prevent com-

mon issues from occurring in the first place (such as using extra caution around known leak points and knowing the things that tend to seize together before they break off and need to be replaced) and also how to successfully deal with the things that do go wrong (like sensors that don’t work or warning lights that come on at strange times) can prevent simple service issues from becoming big, time-consuming, money-losing headaches.

And it’s not difficult. With a bit of knowledge and experience – and having the right tools and components – servicing TPMS systems doesn’t need to be problematic.

## General service

Until recently one of the most common concerns about working on a vehicle with TPMS was that performing general tire services like rotating wheels or installing or removing seasonal tires would affect the TPMS system and illuminate the warning light. This isn’t as much of an issue anymore.

No doubt it’s still important to know if the system needs to be reset after service (or if newly installed wheel sensors need to be programmed and if so,



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# A practical guide to TPMS



Another common TPMS fear was causing problems when switching from winter to summer wheels.



how) so that the warning light won't illuminate a few minutes after the customer picks up the vehicle.

But in general now, (always check service information and be sure) if there's just one warning light or message for the whole system, it's fairly safe to assume that the individual sensors likely won't need to be manually programmed to new positions if a wheel is moved to another position on the vehicle – so there's not likely to be issues rotating tires (but always check service information to be sure because there are exceptions). It's generally safe to assume that if there's a separate reading displayed for each wheel, the system may indeed need to be reset if the wheel moves from its original position (in other words, relearned after tire rotation). But, again, check service information to be sure.

TPMS relearning and programming is relatively simple to manage with the programming tool. Since many newer vehicles have modules that can determine wheel position without being manually reprogrammed this is becoming less and less of an issue. But, again, always check and be sure – never just blindly trust that the system will adapt on its own. It may not, and the system may illuminate the MIL or not function correctly.

However, if the vehicle does indeed need to be relearned, it's important to note that the procedure for relearning a sensor's position on the vehicle varies among vehicles and manufacturers, and though it's typically done using the tool (as directed by service information and usually prompted by the tool) just as there's no single way of resetting oil change reminder lights or of programming ignition keys there's also no single way of resetting TPMS systems.

Save time and headaches by checking service information and finding out ahead of time what needs to be done. Doing a bit of research can prevent time-consuming problems from developing.

Another common TPMS fear was causing problems when switching from winter to summer wheels (or vice versa) – and even this isn't as much of a problem anymore.

Many customers now use “cloned” TPMS sensors which eliminate the need to program new sensors when the wheels are changed. Customers usually mention when their seasonal wheels have “cloned” sensors and thanks to Internet chat rooms and ...**CONTINUE READING** □



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# TELEMATICS/CONNECTIVITY

## Consumer Electronics Show spawns telematics, ADAS news

CES was about the gestation of automotive technology

BY BRIAN ALBRIGHT  
Correspondent

Jeremy Carlson is the principal automotive analyst at IHS Markit. He spoke with *Aftermarket Business World* about the connected vehicle market and announcements at the recent Consumer Electronics Show (CES) and Detroit Auto Show in January.

### TRENDS & MARKET Analysis

**Q:** Relative to the autonomous vehicle market in general, do you believe we'll see ride sharing/hailing services leveraging the technology first?

**A:** Most definitely. The ride hailing business model is the one where we expect to see the biggest impact in terms of miles driven. Mobility services are going to be the first place where we have fully autonomous vehicles deployed.

**Q:** How will this focus on shared mobility affect unit sales?

**A:** We're really early on in thinking about this.

What will shared mobility, autonomous driving and electrification mean for what vehicle segments?

In the future, there will be companies selling units, and some selling miles or time, at least to some portion of the population.

**Q:** What were some of the most significant products or announcements around autonomous vehicles at CES?

**A:** This was a CES that was really about the gestation of technology. We saw a lot of big headlines in the last several years at CES around autonomous driving, around new mobility solutions, vehicle electrification, etc.

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JEREMY CARLSON



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# LOGISTICS/CONNECTIVITY

## NAFTA renegotiation talks make automakers nervous

BY BRIAN ALBRIGHT  
Correspondent

The U.S. automotive industry is watching the ongoing renegotiation talks between the U.S., Mexico and Canada over the North American Free Trade Agreement (NAFTA) with trepidation. President Donald Trump made reforming or abandoning the 24-year-old agreement a key part of his presidential campaign, and the administration's demands of its trading partners could very well sink the agreement.

### TRENDS & MARKET Analysis

Industry groups estimate that abandoning NAFTA and reverting to World Trade Organization tariff levels would cost the auto industry \$10 billion per year and the loss of 50,000 U.S. auto parts jobs.

Talks stalled after the most recent round of talks in Montreal, in part because of the U.S. requirement that the North American (and United States) content of cars be raised substantially. The looming presidential election in Mexico on July 1 could further complicate negotiations.

The Trump administration wants the requirement for the value content of automobiles sourced from NAFTA

countries to rise to 85 percent (up from 62.5 percent) for tariff-free trade, and that 50 percent of every vehicle produced in the region must come from the United States. U.S. parts content currently averages 30 percent.

Both Canada and Mexico have rejected the 50 percent content requirement, and automakers have balked at what would represent a costly and unprofitable restructuring of their entire supply chains.

"We'd argue the current [rules of origin] work," says

### Technology Newsmaker

### Q&A

LISA ANDERSON  
President  
LMA Consulting Group



Q What is driving the increased interest in supply chain technology investment?

A What did Anderson say? Continue reading online. [Read full interview](#)

“ U.S. auto sales could decline by 450,000 vehicles if NAFTA goes away and a 35 percent tariff is imposed. ”

Matthew Blunt, president of the American Automotive Policy Council (AAPC) and former governor of Missouri. "The 62.5 percent regional value content requirements are the highest of anywhere in the world, and struck the right balance. What the administration proposed is not just difficult, but impossible to comply with. There is not a single product built anywhere in North America today that would meet the requirements of the U.S. proposal. It would drive investment outside the U.S., and actually achieve the opposite of what the administration is trying to do."

According to the Center for Automotive Research (CAR), U.S. auto sales could decline by 450,000 vehicles if NAFTA goes away and the 35 percent tariff the president has suggested were imposed. Boston Consulting Group and the Motor & Equipment Manufacturers Association (MEMA) estimate the U.S. auto parts industry could lose 50,000 jobs.

NAFTA has been characterized as a "job killer" by critics almost since its inception, and the Trump administration's position on U.S. content in automobiles is targeted at increasing production and jobs in the United States.

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# VENDORS

## Norway, a top-ranked EV market, invests in new technology

BY JAMES E. GUYETTE  
News Correspondent

When President Donald Trump courted controversy by using a vulgar term to describe Haiti and Africa, calling for more immigrants from countries like Norway instead, perhaps he didn't realize that most Norwegians are probably more inclined to say thanks, but no thanks.

### TRENDS & MARKET Analysis

Although immigrants from Norway to the United States amounted to 800,000 people between 1825 and 1925, in 2016 only 1,114 Norwegians moved here – compared to the 1,603 Americans who pulled up stakes and migrated to Norway.

Blessed with spectacular scenery amid a mountainous, albeit wintery environment, the Nordic nation's citizenry takes top honors in the World Happiness Report. They enjoy the globe's fourth-highest per-person gross domestic product, near-full employment levels, universal health care and a life expectancy averaging 81.8 years; in the U.S. it's 79.3 years.

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Norway's largest industry is petroleum production, but they burn very little of it in their vehicles – preferring pristine and pollution-free fjords rather than gas-fueled Fords and other internal combustion models.

On a per-capita basis Norway ranks No. 1 in the world for the adaptation of electric vehicles, trailing only China, the U.S. and Japan in sheer numbers. EVs account for more than half of the 2.7 million-plus cars

On a per-capita basis, Norway ranks No. 1 in the world for the adaptation of electric vehicles.

on Norway's roads.

Charged via an ample supply of clean and green hydroelectric power connected to an extensive network of quick-and-easy plug-in stations, EVs have become practical and popular for a population of 5.2 million people.

"Norway is a test bed for new models," says Heming Bjorna, senior automotive segment specialist for the U.S. Commercial Service in Oslo. For EV-ready American parts and service providers, "This could be a market opportunity."

Dealership bays are commonplace, but "there are no dedicated EV repair shops as far as I know," he reports. Norwegians expecting lower EV repair costs because of fewer moving parts are looking askance at pricy maintenance fees.

"This may be ironed out as the market gets more mature," says Bjorna. "Since Norway is a pioneer when it comes to adaptation, lack of access and supply (for parts and services) can be a problem at times. Norway is a prioritized market by most EV manufacturers, but it is nevertheless less-streamlined than traditional value chains.

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### Vendor Newsmaker

### Q&A

#### HEMING BJORNA

Senior Commercial Specialist  
U.S. Commercial Service



What assistance does the U.S. Commercial Service provide for companies interested in doing business in Norway?



What did Bjorna say?  
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# VENDORS

## Retro Porsches, VWs become EVs at California entrepreneur's shop

BY JAMES E. GUYETTE  
News Correspondent

**D**avid Benardo's Zelectric Motors shop in San Diego specializes in converting vintage petroleum-powered Volkswagens and Porsches into electric vehicles.

The emphasis is on retaining and exquisitely refinishing the original outward appearance – replacing the internal combustion engine with an EV powertrain and discretely updating and modernizing the various components throughout.

### TRENDS & MARKET Analysis

Additional engineering and conversion expertise is frequently subcontracted out to parts and services provider EV West of San Marcos, Calif.

Established in 2012, Zelectric “is not and never will be a factory assembly line operation,” Benardo explains. “Each vehicle is meticulously rebuilt by hand into retro-futuristic experiential art on wheels. By the nature of the business itself, production will always be limited to bespoke creations, each somewhat unique.”

His wife, Bonnie Rodgers, manages the office and

marketing aspects while assisting in locating stock classic car candidates suitable for undergoing the EV conversion process.

Benardo, who describes himself as the shop's “CEO, Director of R&D and RetroFuturist,” recently provided some insights into Zelectric's operational details:

**Q:** Do you sell complete vehicles?

**A:** Yes. We offer turnkey classics that are reborn electric, meticulously hand-rebuilt to order. Drivetrain conversion from fossil fuel is the hallmark of the Zelectric rebuild. But in addition, select upgrades and modifications ensure a dramatically improved driving experience. We use only proven components from world-class suppliers.

**Q:** Do you have a kit so I can do it myself?

**A:** No. It's complicated. Individual components used in the basic electric conversion cost around \$20,000, and that does not include Zelectric's additional mechanical and proprietary modifications to support the conversion. When purchased alone, conversion components do not come with instructions for assembly or installation.

**Q:** What does a turnkey Zelectric cost?

**A:** Typical ZelectricBug sedans start at \$73,500. But

“ Zelectric Motors offers turnkey classics that are reborn electric, hand-rebuilt to order. ”

every car is a mid-century classic and is priced according to its unique characteristics. Less common sunroof (rag-top) models generally run \$10,000-\$15,000 higher and the highly desirable convertibles can add an additional \$20,000 or more. We specialize in finding exceptional candidates, or may have one currently available.

Base price varies according to the model and year of the vehicle you envision. For a ballpark cost estimate on Microbuses, Karmann Ghias, and VW Things add \$55,000-\$75,000 (Zelectric retrofit and conversion) to the current (excellent condition) market value of the “core” vehicle that you have in mind. Extra options are available.

**Q:** Will you zelectrify my air-cooled car or microbus?

**A:** Yes. But, other than its engine, your vehicle must be in excellent condition. Including our proprietary upgrades, modifications and conversion, the base price for retrofitting your Beetle, Karmann Ghia, or VW Thing is \$54,500. A Microbus

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DAVID BERNARDO

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# Paint materials: Don't confuse EXPENSE WITH COST

You can look at paint material dollars in a couple of different ways – the price you pay on the jobber invoice – the expense – or the amount you use on a job – the cost. The problem with looking at the expense is it's difficult to realize the value. To see the true value of a product you need to determine your cost per paint hour.

Let's take a gallon of clear for instance. You can purchase clear from your jobber at several different price

points, generally ranging from \$125 to \$250 a gallon. At first glance, you might think the lower priced clear is a better value.

However, by reviewing your job cost on the lower priced clear you found the painter was only able to get 40 to 45 paint hours per gallon. Checking your job cost on the higher priced clear

you see that your painter completed 85 to 90 paint hours per gallon. Comparing the two by cost per paint hour, the lower priced clear costs about \$3.12 while you only spent \$2.94 for the higher priced clear.

As you can see, the higher invoice price brings better value because it has a lower cost per paint hour. Using this example, the price on the jobber invoice should only be used to issue payment. The cost per paint hour presents a better example of what you are truly spending. As you validate your cost per paint hour on the remainder of your liquid products through job costing, you will see the value in the expense and reduce your paint cost overall.

Job costing isn't new, it's just not focused on as much as it should be. Most paint mixing systems have the option of recording paint mixes by repair order. Requiring your painters to mix liquids by repair order is the first step in job costing. Ensuring all liquids used on a repair are measured will help determine the total cost of products used to complete the repair. By dividing the cost of products used by the paint hours documented on the damage appraisal, you can determine your overall cost per paint hour.

The added benefit of job costing is identifying waste.

“To see the true value of a product you need to determine your cost per paint hour.”

As you review the scale report, you can determine if too much product was mixed. I was helping a customer review some job costs and found examples where the cost per paint hour was way too high. As we reviewed the mixes, I found a job where the painter had originally mixed 20.8 ounces of clear, which based on the panel calculator was the correct quantity. However, just below that we saw the painter mixed an additional 18 ounces of clear. We printed that mix report so we could discuss it with the painter.

The next step in job costing is to compare what was consumed to the amount calculated for reimbursement on your damage appraisal. Once you have validated your paint mix and found you have spent more for product than the amount on the damage appraisal, you will need to create an invoice. You can use that paint system generated invoice to validate the added  
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**JOHN SHOEMAKER**  
Business Development Manager  
BASF North America

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# One SheCanic's #MeToo moment OUTLINED IN HER BOOK

Even mechanics can spark their own #MeToo movement. That moment came in the form of a car care book, authored by Patrice Banks, owner and technician of a vibrant all-women's auto repair shop.

Banks spoke about her 2014 book, "Girls Auto Clinic Glove Box Guide" with National Public Radio about a phase in her life when she felt helpless and fearful of having to consult male installers about routine vehicle repair. Will readers feel baited into the national conversation about sexual intimidation and coercion? No. Instead, this book transcends the women's marches that took to the country's cities this past January. Banks leverages a forceful pragmatism through personal empowerment, which is why the auto care industry can benefit from her insights.

Expect a playful narrative that exudes a conversational banter between two girlfriends meeting over a glass of wine. Within the confines of a dysfunctional household, raised by her single mom who prioritized transient boyfriends over holding down a full-time job, Banks established a support system of mentors who enabled her to forge an educational pathway in engineering.

Meanwhile at age 16, Banks obtained her first car that

she abused partly out of ignorance, partly out of fear of consulting a repair shop. It fostered a thorny relationship with her local repair man, concedes Banks. Some blame went toward the shop who treated her as a ditz, but in hindsight, she regrets delegating the diagnostic work to her buddies while it was just as easy for her to pop open the hood.

This cautionary tale shifts forward by relating her frustrations with other women who set themselves up believing that they know less than the guys. Two reasons why Banks left her six-figure engineering career to launch her auto clinic is that she aspired to take full control of her life and give back to other women.

While researching possible businesses to start, she asked her female peers, "What do you wish you know about that you usually have to pay a man to take care of?" Hands down they said car and truck repair. From there asserts Banks that "77 percent of drivers believed women are likely to be misunderstood and/or taken advantage of when bringing their cars in for service." With a dearth of female mechanics, explained Banks to National Public Radio, she became one, and ultimately named her business Girls Auto Clinic Repair Center.

Herein lays a missed opportunity to invite dispirited

“ Patrice Banks left her six-figure engineering career to launch her own auto clinic to take control of her life. ”

men to ride along the same road that Banks traveled. While she earns kudos about addressing the fear and anxiety factor, newly licensed teen-boys, and older males can also fall onto the auto airhead spectrum. Shame does not discriminate by gender.

Given exploding technological updates, aspiring car pros cannot possibly know everything that appears beneath the vehicle's shell. Therefore, sensitive male readers should forgive Banks' oversight and embrace the two remedies that she prescribes: the importance of treating the vehicle with deference and finding a competent mechanic.

For remedy one, Banks introduces the SheCanic, someone who is knowledgeable about car care as she is with her own body. As the analogy goes, the SheCanic "doesn't try to be her own physician, but she wants to know how to maintain her health and prevent sickness and disease."

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ALAN R. SEGAL  
President,  
Best Business Practices

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# Enacting infrastructure legislation: HOW COMPLICATED CAN THIS BE?

Now that Congress has tackled and achieved tax reform legislation, many in Washington, including the President, are calling for infrastructure legislation to be the next big-ticket item for Congress to tackle.

Enacting or talking about congressional action that would increase funding for infrastructure projects such as better roads, improved ports and a safer and more efficient power grid, is great for politicians because it creates jobs and improves the quality of life. Further, improving the nation's infrastructure is a bi-partisan subject and could (I want to emphasize the word "could") bring the two sides of the aisle together to support a bill that provides many benefits to the economy and to the American people.

For the aftermarket, investing in infrastructure would have many benefits. Number one, we are an industry that depends on being able to move goods from point A to point B, and anything that reduces bottlenecks and helps make that process more efficient, is going to benefit the industry's bottom line. Further, international trade, both imports and exports are critical to the success of many companies in the industry.

Clearly, improving U.S. ports could be extremely

beneficial to making auto care companies more profitable. Finally, if consumers can drive more, that means more auto parts are being sold, which of course benefits everyone's bottom line. Yes, I have been told that pot holes are good for business, but in general, the industry benefits the more people can get on the road and travel (don't forget, we will always have weather extremes to drive business).

So, this seems like a no-brainer, right? Let's get Congress to work on a bill that not only will generate political good will, create jobs and improve the business for many U.S. companies. Wait, there is one small detail: How do we pay for it!

Nowhere has this become more apparent than with our roads. Currently, federal funding for road construction comes out of the highway trust fund, which is paid for by gasoline taxes. However, the tax has not been increased since 1993, and it has lost 40 percent of its purchasing power due to inflation.

Further eroding the fund is the fact that it is collecting less revenue due to the increase in fuel economy of today's vehicles, a situation that is likely to continue as the number of electric and hybrid vehicles continues to grow. In other words, one of the most crucial

“Federal funding for road construction comes out of the highway trust fund, paid by gas taxes.”

ingredients in driving our economy is our roads and we are doing an extremely poor job in keeping it in shape, never mind improving it.

According to the American Society for Civil Engineers, "the U.S. is on track to invest from federal, state, local, and private sources less than half what is needed in surface transportation over the next decade, leaving a \$1.1 trillion gap." It's difficult to believe that something so important as our roads would not get the immediate attention of Congress, but the problem of infrastructure funding is, like everything else, bogged down in politics.

Namely, many on the Hill have said that an increase in the gasoline tax would amount

to a tax increase and therefore violate a pledge made by many legislators not to raise taxes. Ever since George H.W. Bush broke his pledge of not increasing taxes, many politicians have been extremely reluctant to touch what many believe is the third rail of

...CONTINUE READING ▢



**AARON LOWE**  
Senior Vice President of  
Regulatory and Government  
Affairs, Auto Care Association

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# New auto technology offers **PROACTIVE CYBERSECURITY**

In the automotive aftermarket, cybersecurity is developed as needed or on an ad-hoc basis. Essentially, a threat is brought to the attention of the developers and they create a patch or an update. Or maybe there is a bug that is detected by someone in the field who is not a hacker, it's reported and a fix is created.

Either way you can see that this is not a sustainable solution. You simply cannot take the complex systems of the modern automobile and continue to automate and improve them without having some type of cybersecurity infrastructure in place before the products are built.

You would not put your money in a bank that waits for the bank to be robbed to figure out how they are going to protect it from the next robbery. That would be unreasonable. But that is what we are asking our customers to do today.

## Welcome development

The development of a cybersecurity technology suite designed and built into automotive systems is a welcome development. And, quite frankly, it is inevitable. This is essentially the next step. Honeywell and LG are working on developing software and intrusion detection

and prevention systems (IDPS) that will be baked into their new products.

Lee Woo-Jong of LG said that there are more than two dozen clearly defined attack surfaces on the modern automobile. An attack surface is simply a defined area of the computer network that can be vulnerable to attack. Every time you add a new computer, you run the risk of adding a new attack surface that can be exploited.

So what are these technologies? Well IDPS is an active technology that aggressively looks for anomalies or strange patterns in a car's internal computer network. Cars have multiple computers and these computers are more and more integrated into one another. Whereas a firewall protects the perimeter of a network and keeps bad things from coming in, an IDPS scans and monitors the inside of the network to find bad things that are originating from the inside. Keep in mind that many attacks originate from inside a computer network.

On the other hand, LG is working on software that will integrate with the interior OEM systems to make them more hardened and aware of cyberattack. This software utilizes LG's transmission control unit (TCU)

The development of a cybersecurity technology suite designed and built into auto systems is welcome.

and electronic control unit (ECU) modules to make this software fit seamlessly into the car's systems, detecting anomalies and looking for threats. These two processes will be utilized according to the needs of the automobile and the level of integration the manufacturers choose.

I suggest they look at these seriously and figure out how they can integrate them into the development of new systems. Once this happens it will evolve into a more widely accepted technology, and that will evolve into a standard.

## We need standards

Once this evolves into a standard we will then be moving into a more formal standards process and will have much greater efficacy in our cybersecurity for our industry.

This is all good news. These are the types of things that make our ability to innovate and move forward more  
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**JERRY HUTCHESON**  
Owner  
Cybercreed Consulting

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# The auto aftermarket is missing A \$4 BILLION SALES OPPORTUNITY

The U.S. automotive aftermarket sector took hits from a number of different sides in 2017. First, there was the softening of U.S. auto sales, which are projected to contract for the next 18 months, shrinking 3.6 percent in 2017, according to Moody's Investor Service.

Also, increased competition from e-commerce giant, Amazon.com, which dug its heels deeper into the sector in 2017, was rumored to have taken market share from the big three automotive parts retailers this year, adding further uncertainty to the future of the industry.

One thing that is certain is that the industry is undergoing a major transformation. The Amazon effect on the big three retailers points to a greater industry trend that is more and more consumers are skipping brick and mortar stores and are turning to online to make aftermarket purchases. The companies that will win in this space are those that are invested in online, and specifically in an omnichannel e-commerce strategy.

According to market researcher Hedges & Company, ecommerce car parts sales are outpacing brick and mortar and will reach \$8.9 billion in 2017, with growth of 15 percent between 2017-18. Over \$4 billion of those

sales will be on mobile. And yet, despite this growth, the automotive aftermarket industry has been slow to embrace ecommerce, let alone mobile or omnichannel.

In recent Sana research on the state of B2B e-commerce, nearly 35 percent of automotive companies have either just deployed e-commerce or have had e-commerce in place for under a year. A whopping 37 percent said that a physical store was the most important channel in their sales strategy and fewer than 18 percent placed importance on the mobile channel. That means more than 80 percent are leaving \$4 billion on the table.

To recoup this found money, it's vital for automotive aftermarket companies to implement a mobile strategy. They can start by employing responsive design: making sure their web stores are mobile friendly. Research shows that 40 percent of users will choose a different search result if the first page they go to isn't mobile friendly. Parts and aftermarket retailers can capture more consumer dollars by giving buyers a quality experience and making it easy for them to purchase parts online: this includes easy navigation, clear product descriptions with engaging images and

“Companies that will win in the online space are invested in an omnichannel e-commerce strategy.”

a simple and secure check-out. Finally, because the majority of consumers find parts online using search, it's critical for aftermarket retailers to focus their marketing on Google, having an SEO strategy, employing the right keywords and considering how AdWords fits into their marketing mix.

So what's driving this huge mobile growth? From a high level, internet habits are changing. Seventy-seven percent of Americans now have access to a smartphone, up from 35 percent in 2011 (according to Pew Internet). Mobile internet use is on the rise, while home broadband adoption has plateaued and an above-average proportion of Hispanics have mobile-only internet access (eMarketer). At the same time, the Auto Care Association said that the DIY market also is growing, from \$49 billion in 2014 to \$54 billion in 2017.

According to Google  
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MICHEL SCHIPPERUS  
CEO  
Sana Commerce

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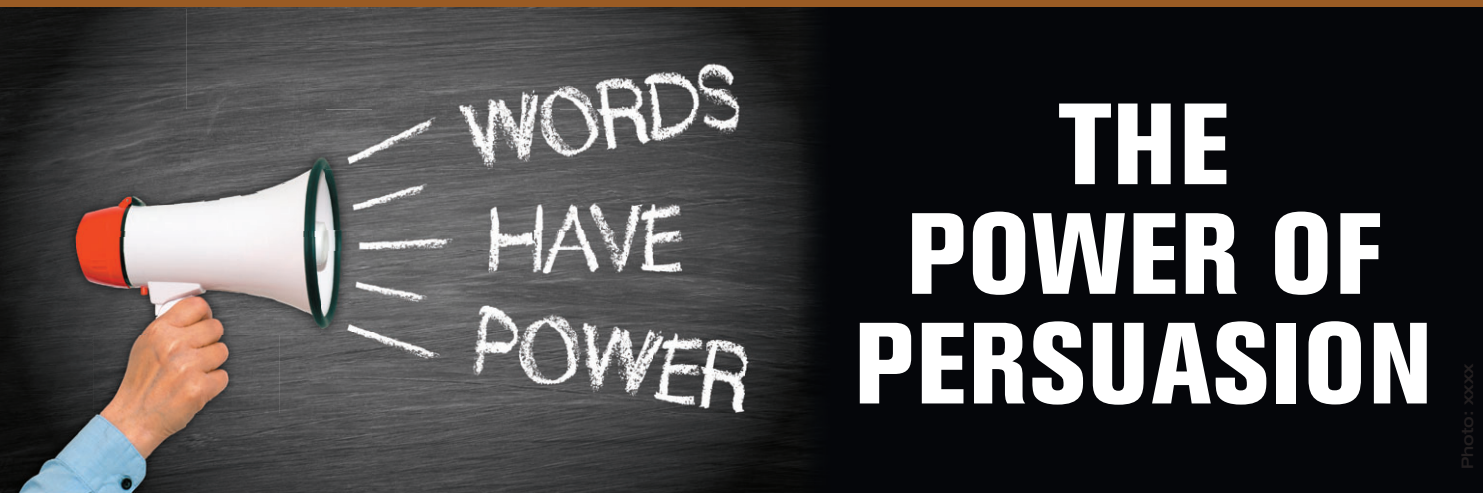
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## AUTO SERVICE FRANCHISES SAY THEIR RECOMMENDATION IS THE BEST MARKETING TOOL

BY BRUCE ADAMS | Managing Editor

Auto service franchise owners and managers overwhelmingly say that the most effective marketing tool they have in their arsenal, which also is the least expensive tool they can use, is their recommendation.

More than three-fourths (77 percent) of the auto service franchise owners and managers responding to the *Aftermarket Business World* 2018 Auto Service Franchise Study of four product categories said their recommendation to customers was their best marketing tool. Coming in a distant second at 7 percent was in-store displays; social media was the best tool for 6 percent of respondents; and coupon/rebates worked best for 3 percent. Another 7 percent selected "other."

When the same group was asked how their customers typically respond when they make a recommendation to buy a particular product, 58 percent said that most of the time customers take their recommendation. Another 27 percent said that customers always take their recommendations; 14 percent said customers sometimes take their recommendations; and 1 percent said customers never take their recommendations.

When it comes to preferred suppliers, 35

percent said they prefer to buy from warehouse distributors, 33 percent prefer to buy from auto parts retailers, 20 percent prefer to buy from jobbers and 7 percent prefer to buy from an OEM parts arm, such as a dealership.

The majority (69 percent) of auto service franchises said they stock replacement auto parts on an add-needed basis, while 24 percent said they carry stock for the most popular makes and models. Only 7 percent said they carry enough stock of the four product categories surveyed for most makes and models.

Some 43 percent of auto service franchise owners and managers said they expect their sales of the products surveyed to increase in 2018, while 56 percent said they expect their sales to stay the same. Of those expecting an increase in sales, 16 percent said they expect a 1 percent to 3 percent increase, 12 percent said they expect a 4 percent to 7 percent increase, 12 percent said they expect an 8 percent to 15 percent increase, and 3 percent expect a 16 percent to 20 percent increase.

Methodology: The *Aftermarket Business World* Auto Service Franchise study was fielded to readers of Motor Age magazine via email. Survey results are intended to show general market trends, not statistical certainties. □

Photo: Shutterstock.com / docstockmedia

## Batteries

### Needs of customers

Quality	32%
Availability	30%
Price	21%

### Most effective marketing tool

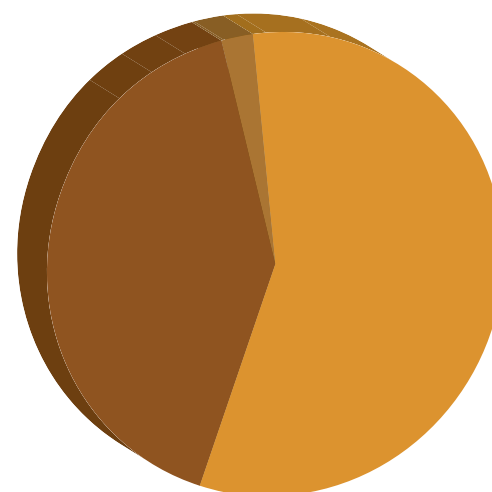
Shop's recommendation	76%
In-store displays	12%
Social media	3%

### 2017 battery sales

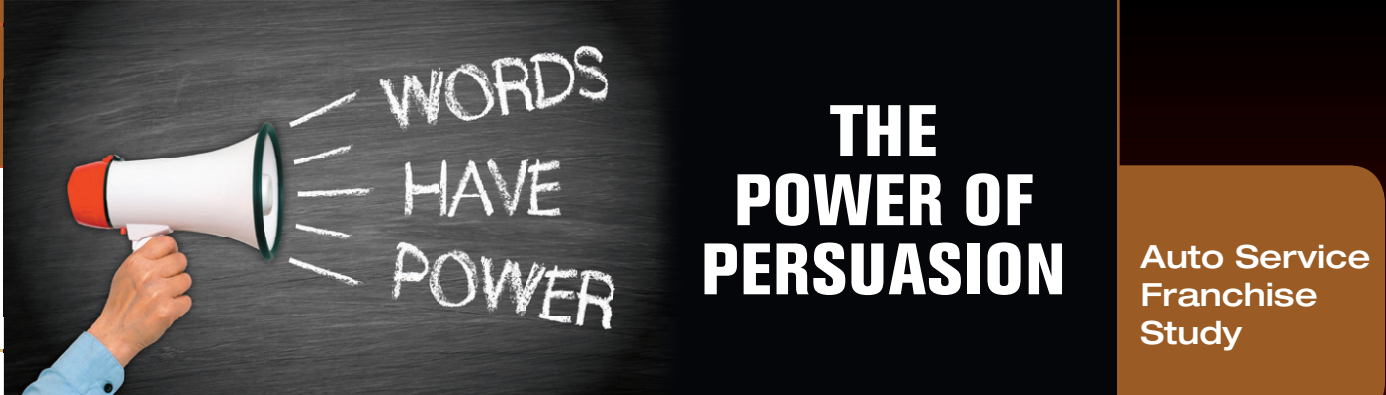
57% Increased

41% Held Steady

2% Decreased



46% of auto service franchisees order this product over the phone.



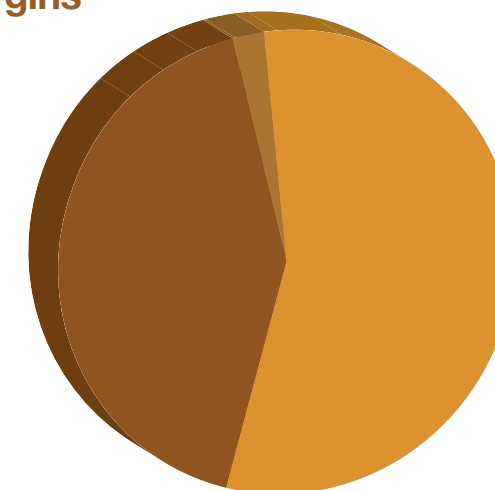
52% of auto service franchisees report that they stock enough product of the most popular sizes.

### Expected 2018 gross margins

56% To Increase

42% To Hold Steady

2% To Decrease



### 2018 battery sales expectations

To increase 1-10%	49%
To increase 11-20%	9%
To hold steady	40%
To decrease	2%

### Preferred supplier

Jobber	20%
Warehouse distributor	39%
Auto parts retailer	29%
OEM parts arm	3%

41% report that

MASS MERCHANDISERS

are the main competitors when selling this product.

Some chart totals do not reach 100 percent because all answer options are not represented.

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# Auxiliary Lighting

## Needs of customers

OEM form, fit and function	24%
Quality	28%
Availability	24%

## Most effective marketing tool

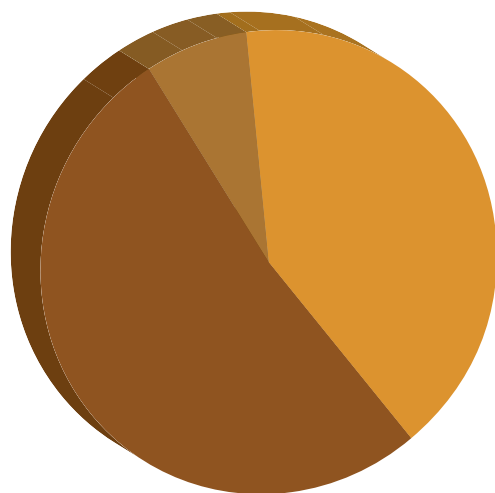
Shop's recommendation	60%
Social media	11%
In-store displays	10%

## 2017 auxiliary lighting sales

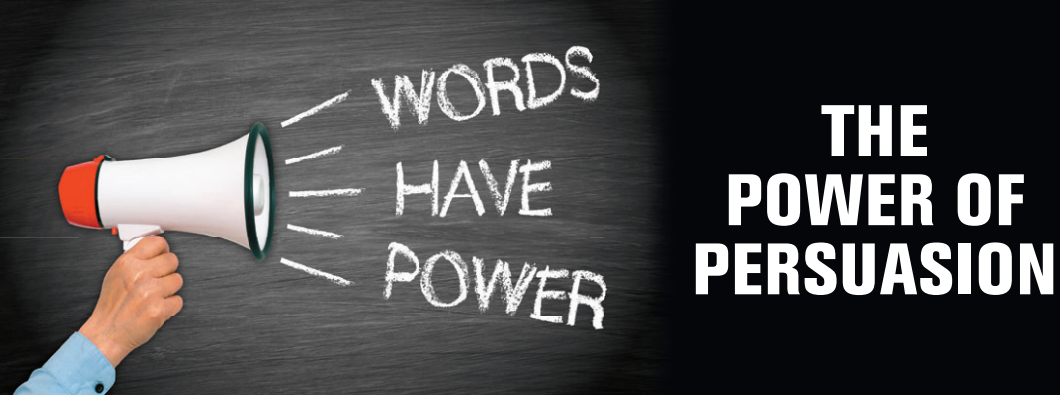
**41%**  
Increased

**52%**  
Held Steady

**7%**  
Decreased



**52%** of auto service franchisees electronically order this product from suppliers.



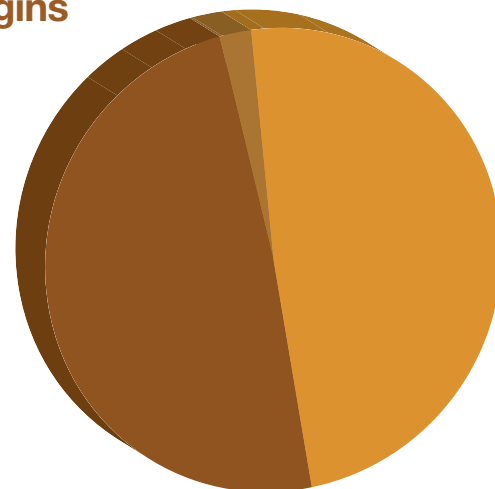
**77%** of auto service franchisees report that they stock this product on an as-needed basis.

## Expected 2018 gross margins

**49%**  
To Increase

**49%**  
To Hold Steady

**2%**  
To decrease



## 2018 auxiliary lighting sales expectations

To increase 1-10%	42%
To increase 11-20%	6%
To hold steady	50%
To decrease	2%

## Preferred supplier

Jobber	17%
Warehouse distributor	31%
Auto parts retailer	37%
OEM parts arm	6%

**33%**  
report that

## OTHER INDEPENDENT REPAIR SHOPS

are the main competitors when selling this product.

Some chart totals do not reach 100 percent because all answer options are not represented.

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# Brakes

## Needs of customers

Quality	43%
Price	19%
Availability	18%

## Most effective marketing tool

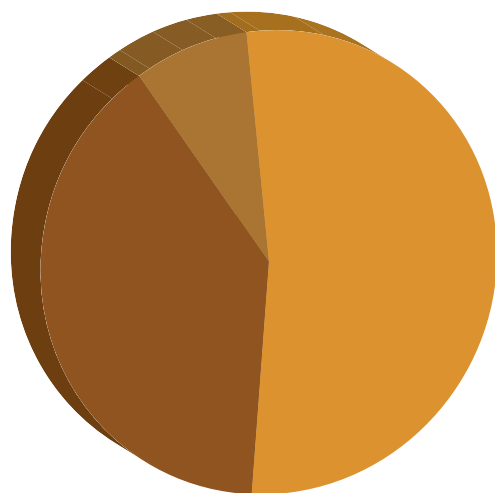
Shop's recommendation	89%
In-store displays	3%
Social media	4%

## 2017 brake sales

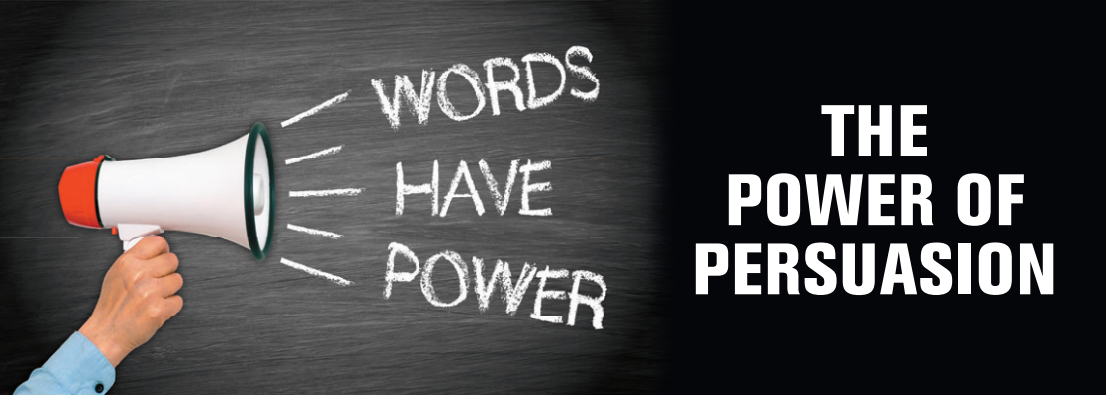
**53%**  
Increased

**39%**  
Held Steady

**8%**  
Decreased



**47%** of auto service franchisees electronically order this product from suppliers.



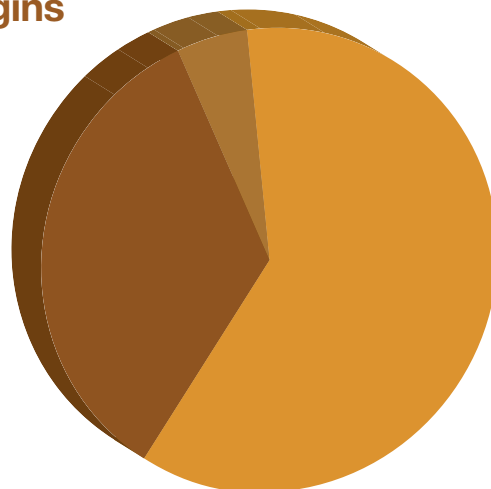
**79%** of auto service franchisees report that they stock this product on an as-needed basis.

## Expected 2018 gross margins

**61%**  
To Increase

**34%**  
To Hold Steady

**5%**  
To Decrease



## 2018 brake sales expectations

To increase 1-10%	54%
To increase 11-20%	8%
To hold steady	34%
To decrease	4%

## Preferred supplier

Jobber	19%
Warehouse distributor	38%
Auto parts retailer	38%
OEM parts arm	4%

**36%**  
report that

**OTHER SERVICE REPAIR FRANCHISES**

are the main competitors when selling this product.

Some chart totals do not reach 100 percent because all answer options are not represented.

## COMBINED EXPERIENCE DRIVING INNOVATION



Remy and Raybestos have a proud history of product development, engineering excellence and state-of-the-art manufacturing. From Acura to Volvo and every make in between, Raybestos and Remy are well known for quality starts and stops of domestic and import nameplate vehicles and together are driving innovation into the future.



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# Fuel Pumps

## Needs of professional customers

Quality	32%
Price	27%
Availability	21%

## Most effective marketing tool

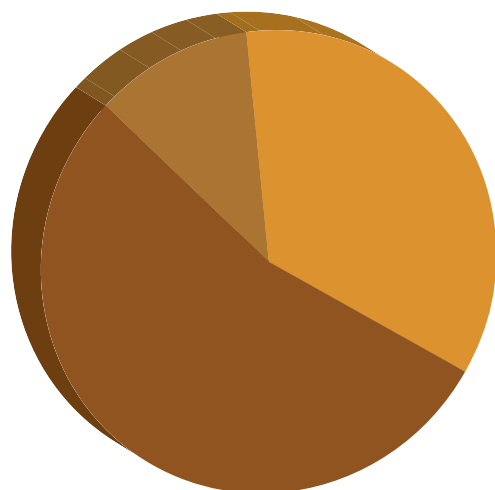
Shop's recommendation	86%
Social media	4%
In-store displays	2%

## 2017 fuel pump sales

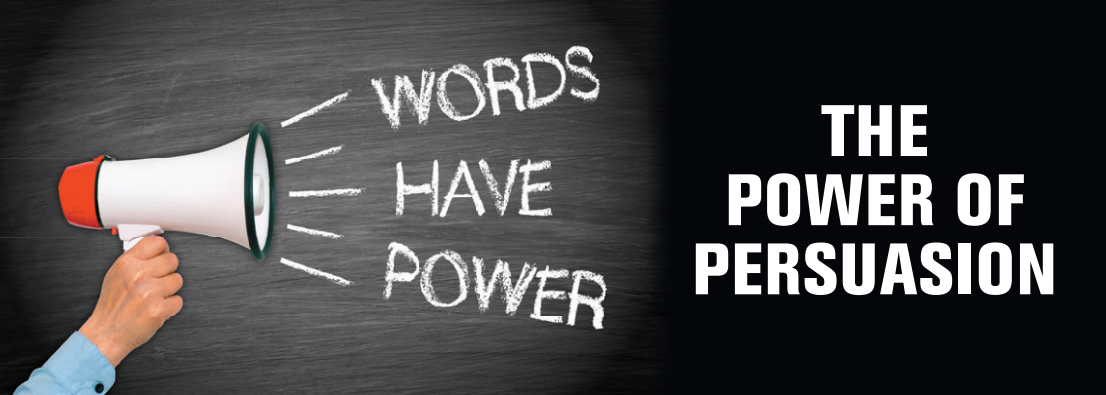
**35%**  
Increased

**54%**  
Held Steady

**11%**  
Decreased



**50%** of auto service franchisees electronically order this product from suppliers.



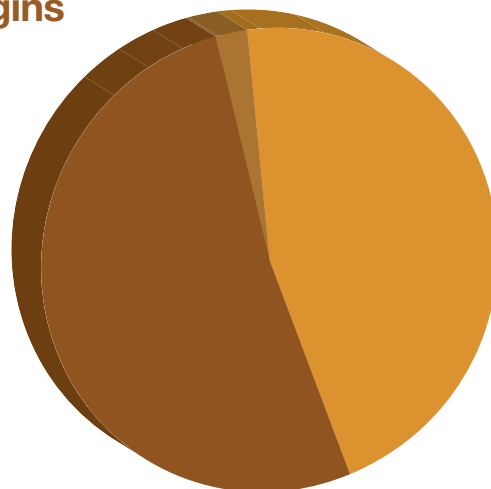
**94%** of auto service franchisees report that they stock this product on an as-needed basis.

## Expected 2018 gross margins

**46%**  
To Increase

**52%**  
To Hold Steady

**2%**  
To Decrease



## 2018 fuel pump sales expectations

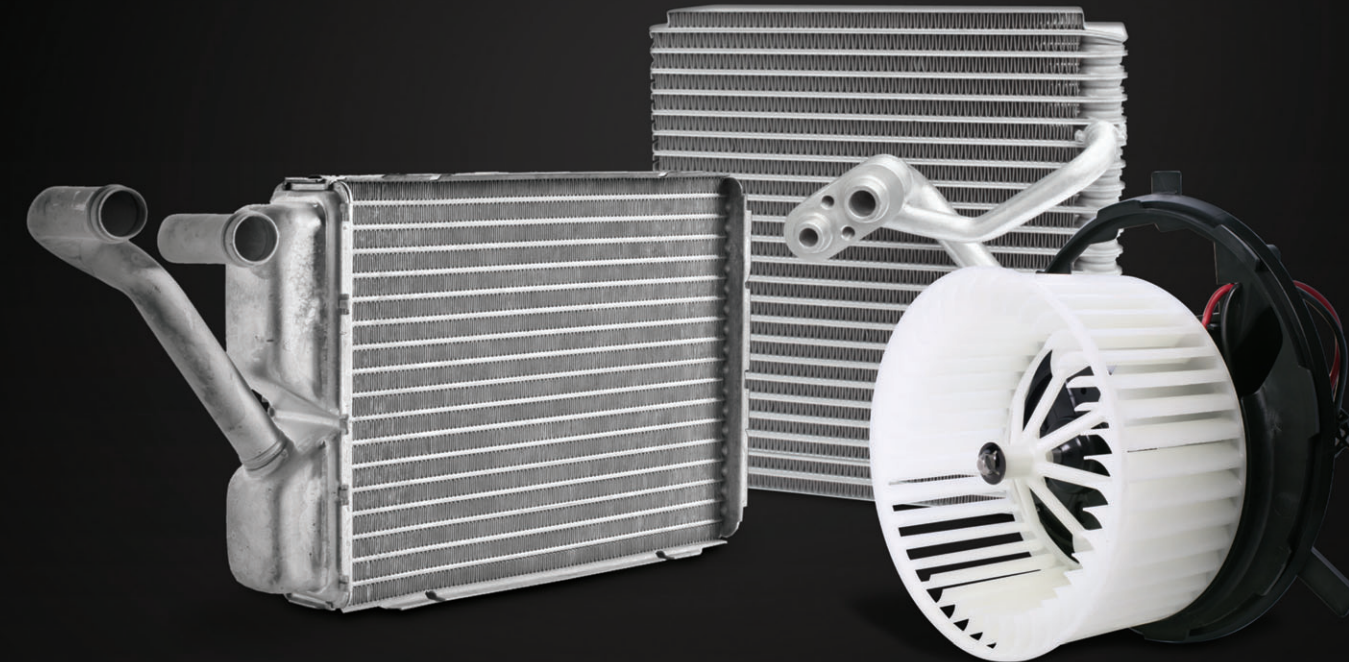
To increase 1-10%	41%
To increase 11-20%	2%
To hold steady	55%
To decrease	2%

## Preferred supplier

Warehouse distributor	31%
Auto parts retailer	28%
Jobber	23%
OEM parts arm	16%

**43%**  
report that  
**INDEPENDENT REPAIR SHOPS**  
are the main competitors when selling this product

Some chart totals do not reach 100 percent because all answer options are not represented.



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