



**JACOBS & DANDOR**  
Glass merchants  
South Africa



**BELRON®**

The world's leading vehicle glass repair and replacement group, operating in 35 countries on five continents and entering other vehicle and home related services

THEN



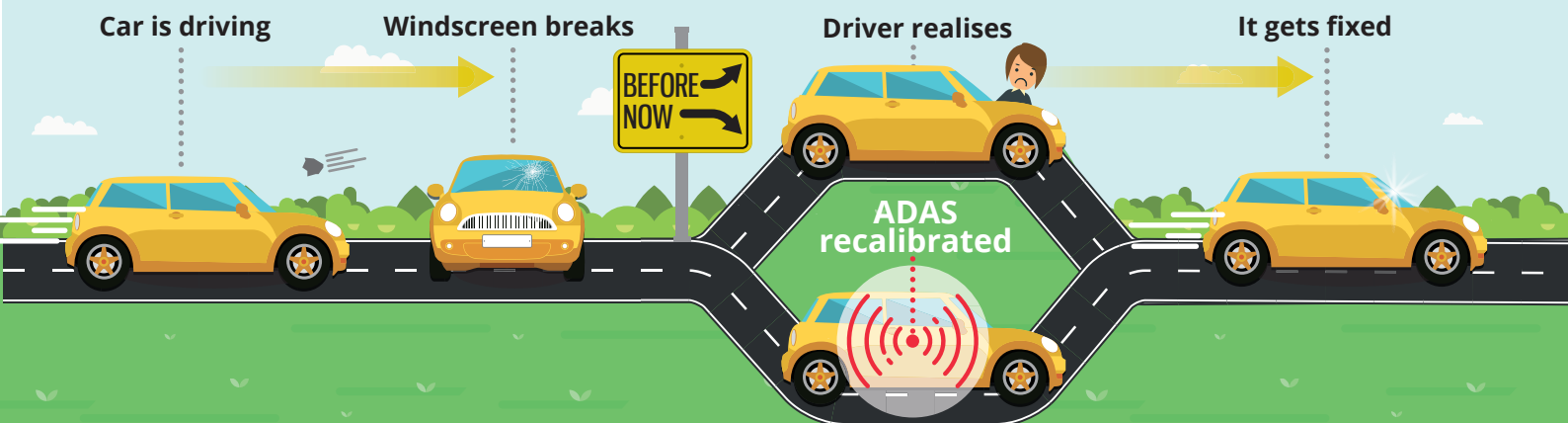
NOW

■ 26,300 employees  
(12,000 in the EU)

■ 15m consumers –  
turnover €3.3Bn

■ 3 out of 4 of our biggest  
markets are in Europe  
(Germany, France, UK)

## GLASS REPAIR AND REPLACEMENT: VEHICLES ARE GETTING **SMARTER**



ALL SAFETY TECHNOLOGY SITS BEHIND

THE REAR-VIEW MIRROR

- The tool plugs into the OBD system that triggers the recalibration of the ADAS system
- Customer then gets a one-stop-shop:
  - No need to go to a separate garage for recalibration
  - Safety is ensured
  - Duty of care to motorists, insurers and fleet operators is met

## THE NEED FOR ACCESS TO THE **MOST UP-TO-DATE DATA**



To ensure safe  
functionality



To enable Belron to  
offer a holistic  
replacement and  
calibration service for  
our customers



To ensure a level  
playing field and offer  
customer choice



## BELRON'S FUTURE: GROWING OUR RANGE OF ADDITIONAL VEHICLE SERVICES



Vehicle glass repair and replacement



Auto-repair services



Vehicle maintenance Services



Claims management

Access to data **directly from the vehicle** for these services is **vital** for us to implement and grow these vehicle related services successfully **for the benefit of our customers**.

Car in an accident



Dealer gets notification first



DEALER



Aftermarket services pushed out of the market



**OUR ASK: A LEVEL PLAYING FIELD IN HAVING UNRESTRICTED ACCESS TO DATA THROUGH AN OPEN TELEMATICS PLATFORM**

**Connected cars today generate data which is relevant to the services we offer the customer.**

**Without access to data, our ability to compete is at risk.**



Accident Alerts



Breakdown Alerts



Car Location



Maintenance Alerts

For our customers and key account partners (such as insurers), if Belron has access to vehicle condition, geographic or driving behavioural data, we can offer them the benefits of **reduced maintenance costs, convenience and enhanced safety and speed of service**.

Any restriction of access to the scope/range of data, whether through time to access, removal of access rights to parts of the range or through aggregation and or homogenization of the data, may severely restrict the capability of an independent aftermarket service company to serve in a timely and convenient way: **which is expected by today's customers**.

VEHICLE MANUFACTURERS AND THEIR DEALERS ALREADY HAVE A HEAD START



**...as the designers and distributors of new cars. Unless the right regulatory structure is put in place, this risks harming competition and innovation for the benefit of the consumer.**