

1897 **JACOBS & DANDOR**
Glass merchants
South Africa

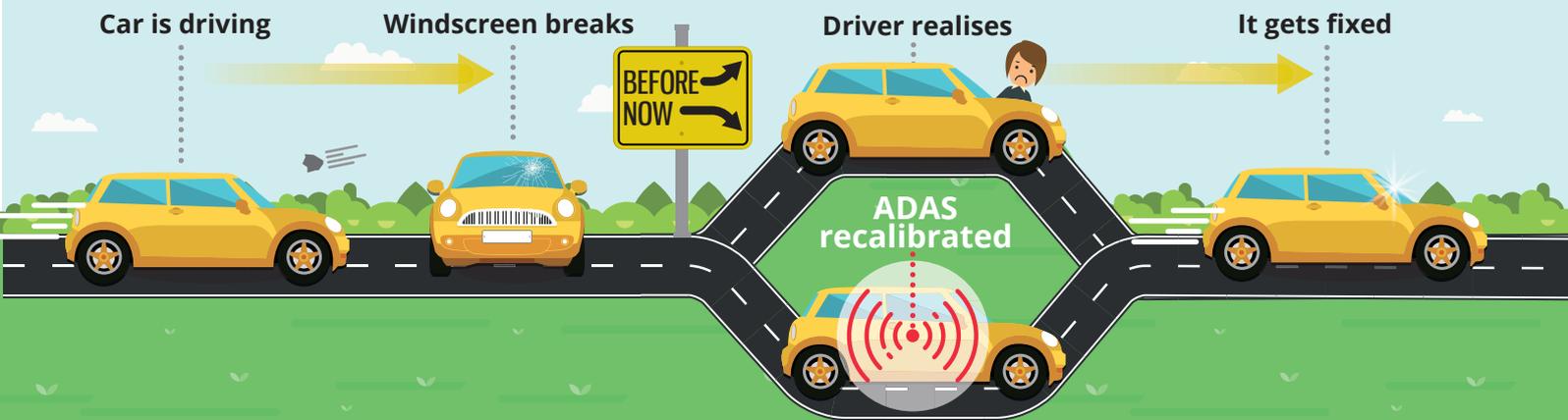
2017 **BELRON®**

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



- 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*.



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



Accident Alerts



Breakdown Alerts



Car Location



Maintenance Alerts

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.

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.