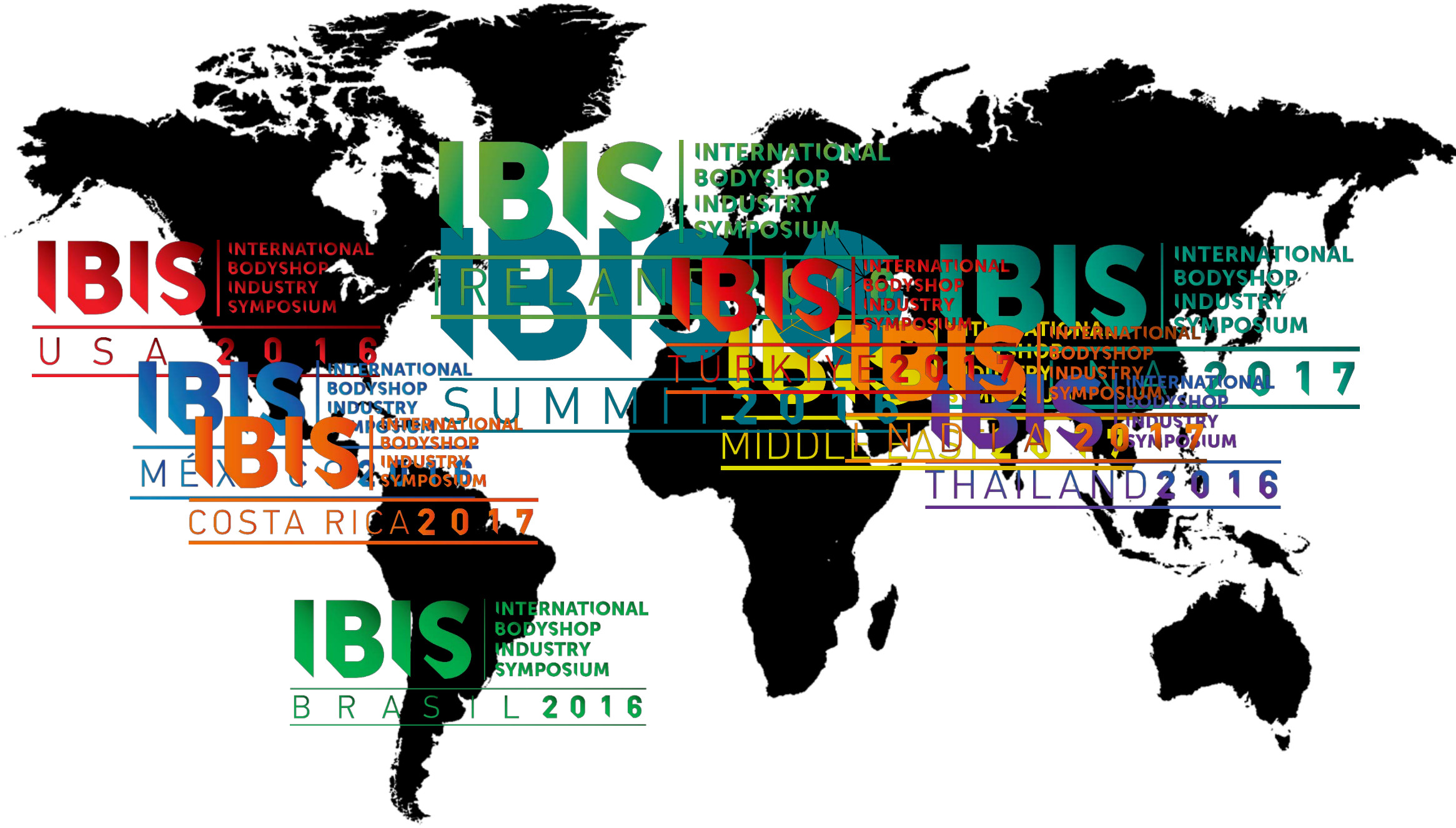


An abstract graphic consisting of a complex network of dark grey and black lines and triangles, with some triangles highlighted in orange. The graphic has a 3D, crystalline appearance and is set against a dark background with some blurred orange light spots.

IBIS | INTERNATIONAL
BODYSHOP
INDUSTRY
SYMPOSIUM
INDIA 2017

Welcome

Graham Threlfall
Development Director, IBIS



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IBIS in numbers...



What we learnt in 2016

- One connected car can produce more lifecycle revenue than ten non-connected cars
- Young talent and skills into our industry continues to challenge
- Consolidation and diversification in the supply chain
- Insurers continue to seek "cost downs" on claims cost
- OEM's increasing their grip on owning the customer
- Collaboration is not yet engendered in our sector
- The effect of millennials and technology on the market

CATALYST FOR MORE DIALOGUE



**IBIS BRINGING KEY LOCAL
STAKEHOLDERS TOGETHER**

IBIS, a global message...



Safety



Skills



Standards

Some shared challenges...

01

Vehicle complexity

02

Refinishes – environment, consumer and technical

03

Future workforce

04

Consumer expectations

05

Consolidation

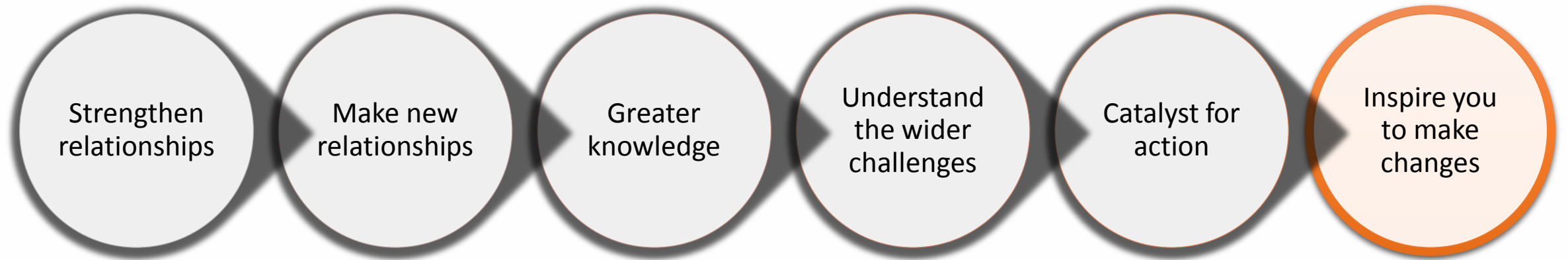
06

Demand for data – KPI's

Agenda

- 13.30 – 14.10 Developing India in the global collision repair sector
- 14.10 – 14.50 The performance factor
- 14.50 – 15.20 Coffee break
- 15.20 – 16.00 Are you ready for technical innovation in collision repair?
- 16.00 – 16.40 Which route is best for the Indian collision repair sector?
- 16.40 – 17.00 Closing summary
- 17.00 – 19.00 Drinks reception

What we hope you gain today...

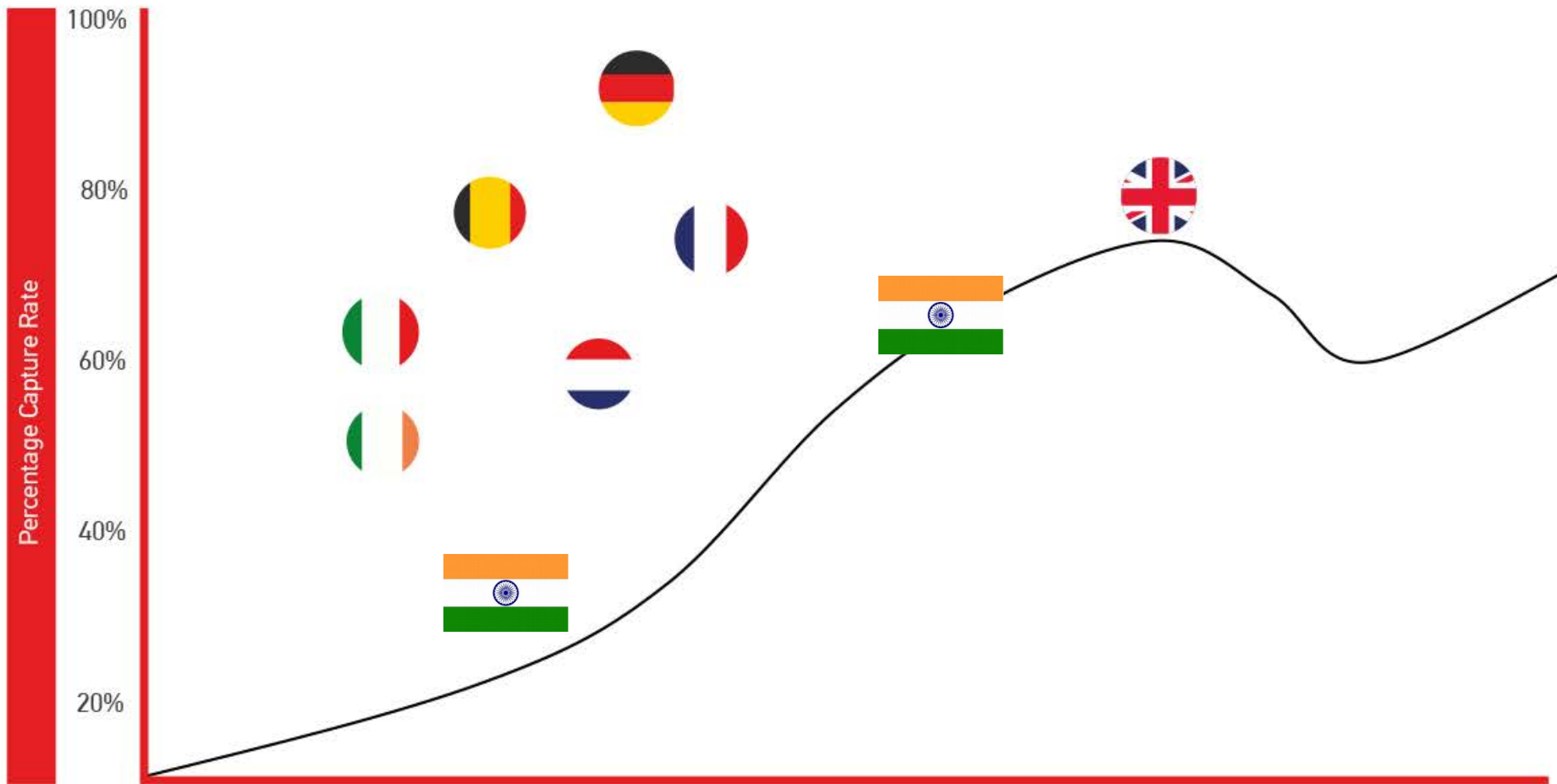


Partners - AkzoNobel

- Continued commitment to India
- Beyond the product
- Leading by example
- Proactive not reactive
- Understand the big picture

'A leader is one who sees more than others see, who sees farther than others see, and who sees before others see.'

Market Maturity Curve



Broker lead sales with no network/steering	Intro direct sales, development of networks	Approved Networks, Active on Steering work Intro A/M	Approved Networks, Paint deals/parts deals	Approved Networks, Third party Capture / Volume Control	Approved Networks, Control supply Chain. Volume control Exit A/M	Battle with OE network for Control of Customer OEM man techniques	OE/ Insurer Collaboration Technology Telematics
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Control of supply chain