

HEADLINE PARTNERS



PARTNERS



IBIS | INTERNATIONAL
BODYSHOP
INDUSTRY
SYMPOSIUM
TÜRKİYE 2017

Quality and market certifications

Bener Yikilmaz
CEO, OSEM



OSEM SERTİFİKASYON A.Ş.

Established by the Turkish Insurance Association

Subject to supervision and audit of the Undersecretariat of Treasury

Its technological requirements are covered by SBM

Aims at raising the standards, efficient cost management and proper competitive environment for vehicle damage repairs

IS THE INSURANCE SECTOR
IMPORTANT FOR YOU?

Is the insurance sector important for you?



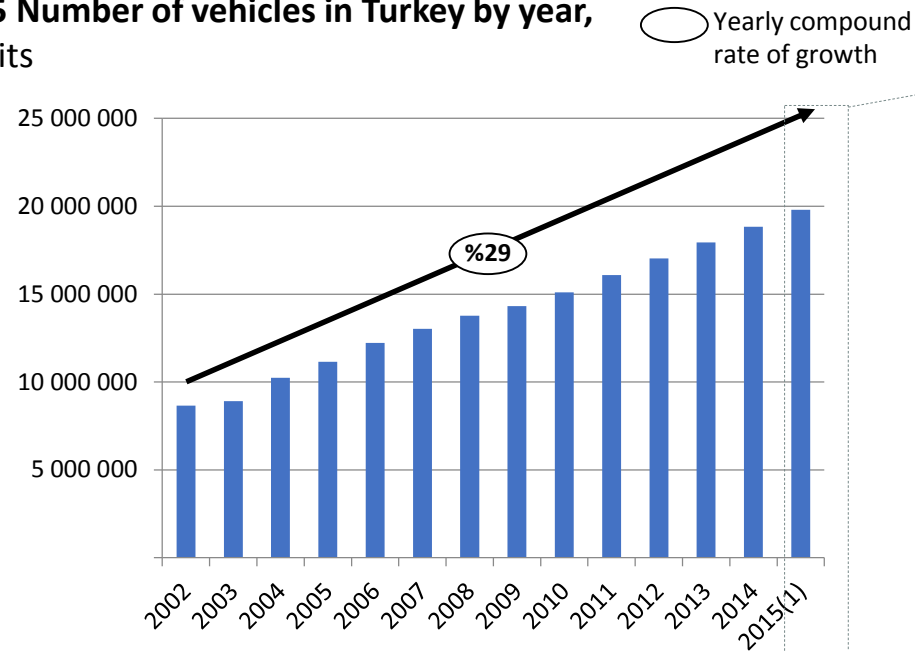
- Insurance is an importance branch of finance
- Insurance is a guarantee for vehicles
- Insurance is the engine of the automotive industry
- It supports vehicles sales and overtakes the risks of the sector

IMPORTANCE MUST BE PLACED ON
THE INSURANCE SECTOR

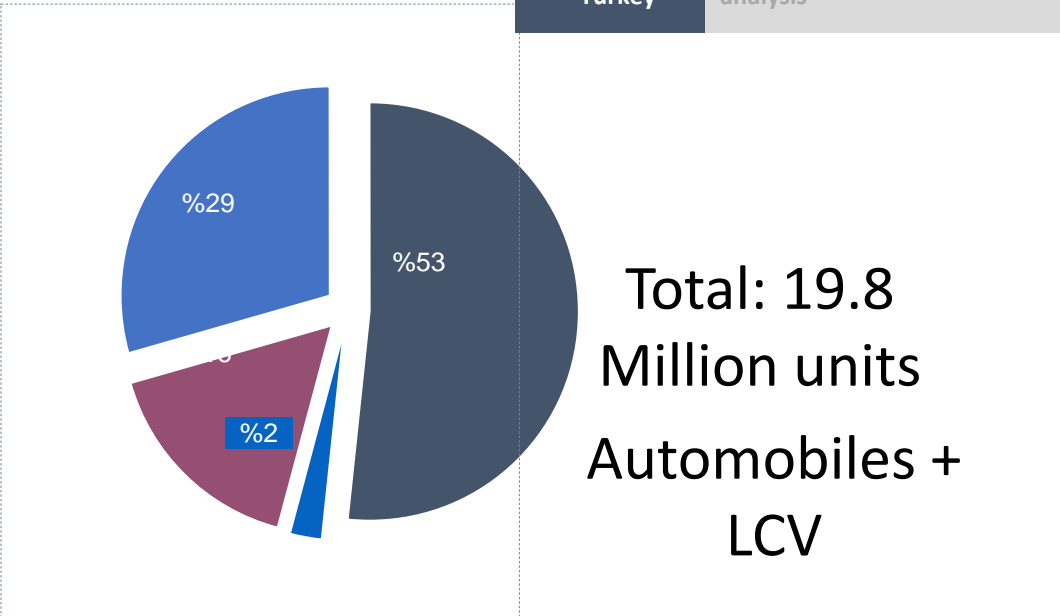
Autos branch of the insurance sector by figures:

'Automobiles' and 'light commercial vehicles' have the highest market shares in a vehicle parc of 20 million

2002-2015 Number of vehicles in Turkey by year, Million units



2015, Number of vehicles by types of vehicle, %

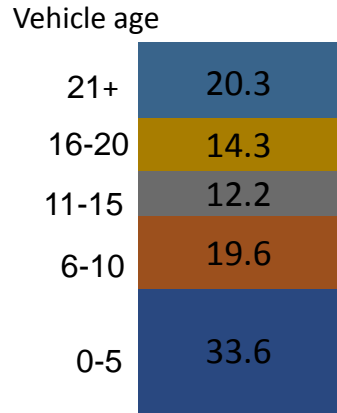


Number of Vehicles in Turkey	Targeted components analysis	Price analysis
19.8 Million units		

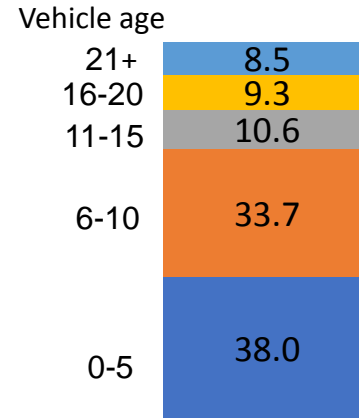
Autos branch of the insurance sector by figures

Number of Vehicles in Turkey	Targeted components analysis	Price analysis
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2014, Automobiles, Vehicle Age, %



2014, Pick-up trucks, Vehicle Age, %



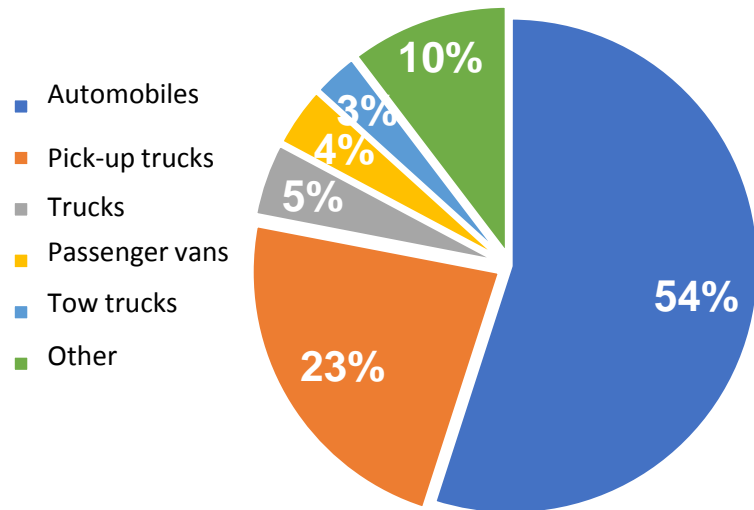
- Automobiles: Ø 12 yıl
- Pick-up trucks: Ø 9.5 yıl
- Automobiles + pick-up trucks: Ø 10,8 yıl

It is observed that average vehicle age is **12.5 years**

Autos branch of the insurance sector by figures

Automobiles and pick-up trucks represent over **80%** of the vehicles that are involved in accidents...

2015, Types of vehicles that are involved in accidents, %



Number of Vehicles in Turkey	Targeted components analysis	Price analysis
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Vehicle type	Number of accidents, 2015
Automobiles	685.875
Pick-up trucks	287.869
Trucks	59.348
Passenger vans	48.854
Tow trucks	36.571
Other	129.201

Total data set: 1.2 million units

Autos branch of the insurance sector by figures

Price analysis has been performed for vehicle brands that make up **68%** of the vehicles that get involved in accidents. It is targeted to implement «Smart Tag» practice for the below components most used in insurance transactions for damages that cover 56% of insurance cost.

Definitions	Vehicle Make and Model	Spare Parts Group	Number of Vehicles in Turkey	Targeted components analysis	Price analysis
<p>Original Part</p> <p>Spare parts for after sales purposes that carry the logo of the brand that the vehicle manufacturer / importer / distributor represents</p>	<ul style="list-style-type: none"> Audi: A3, A4, A6 BMW: 316i, 318d, 320d, 520d, X5 Fiat: Albea, Brava, Doblo, Ducato, Linea, Fiorino, Grande Punto, Siena, Palio, Şahin, Tempra Ford: Fiesta, Focus, Fusion, Transit, Transit Connect Honda: Civic Hyundai: Accent, Getz, H100, i30 Mercedes-Benz: C seri, E seri, Sprinter, Vito Opel: Astra, Combo, Corsa, Insignia, Vectra Peugeot: 206, 207, 308, Nemo, 407, 206+, Partner Renault: Bipper, C4, Jumper, Berlingo, Clio, Fluence, Kangoo, Master, Megane, R 9, R12, Symbol VW: Bora, Caddy, Crafter, Golf, Volt, Jetta, Passat, Polo, Transporter Toyota: Auris, Corolla, Yaris 	<ul style="list-style-type: none"> Front Bumper Rear Bumper Engine Bonnet Grille Head Board Front Bumper Trunk Lid Front Fender Rear Fender Complete Headlight Front Door Back Door 			
<p>Original Part Without a Logo</p> <p>Spare parts of the manufacturer that manufactures spare parts for automotive key industry using the same production line, which do not carry the logo of the vehicle brand, but offered to after sales market in its own box and with its own logo</p>					
<p>Certified Equivalent Part</p> <p>«Product quality» certified spare parts that do not carry the vehicle brand logo manufactured by manufacturers with “product based quality certificates” issued by companies such as CZ, CAPA, THATCHAM but that do not supply spare parts to automotive key industry</p>					

616 parts

13 brands

12 spare part groups

Autos branch of the insurance sector by figures



According to 2016 data, as for body group metal, plastic and lighting parts:

- **8.3 Million** units of original and equivalent parts are replaced yearly, amounting to approximately TL **2.3 billion**
- **93%** of replaced parts are **original** and **7%** are **equivalent**

INSURANCE COMPANIES WANT TO BE 100% SURE THAT A PART IS GENUINELY ORIGINAL!

Because:

1. They want to pay for the proper spare part
2. They want to prevent unfair competition

Thus, the SMART TAG system verifies genuineness of the spare parts

Goal:

- Having the producer which is the initial distribution channel of the part or the distributor, tag an original part and a certified equivalent part
- Mobile devices will follow up smart tags.
- Parts that do not comply with the legislation.



ADVANTAGES OF THE SMART TAG SYSTEM

AUTOMOTIVE

- COMPATIBILITY WITH THE INSURANCE SECTOR
- INCREASE IN SPARE PARTS SALES VOLUME
- ASSESSMENT OF SALES PERFORMANCE
- PREVENTION OF UNFAIR COMPETITION



INSURANCE

- PAYMENT FOR THE PROPER PART
- PREVENTION OF UNFAIR COMPETITION
- PERFORMANCE ASSESSMENT
- CUSTOMER SATISFACTION



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Thank you