



ANNUAL REPORT

2019 / 20



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Foreword

“Our virtues and our failings are inseparable, like force and matter. When they separate, man is no more.” - Nikola Tesla (10 July 1856 – 7 January 1943), Serbian-American inventor, electrical engineer, mechanical engineer, and futurist best known for his contributions to the design of the modern alternating current (AC) electricity supply system and whose name lives on in Tesla, Inc., the American electric vehicle and clean energy company based in Palo Alto, California.

The simplest explanation I have seen for Tesla’s quote is: *“There is no perfect being. What defines or makes us are our strengths and flaws. There is no point in trying to alienate one from the other. We have to live and contend with who we are.”* The year under review illustrates this compelling notion well on a global scale. Both locally and internationally, governments with varying levels of expertise and approaches to curb the economic impact of the global COVID-19 pandemic crushed some businesses and elevated others beyond belief.



by Jeáenne Esterhuizen
RMI President

Locally, an already battered economy was further pumelled by the monster pandemic. The South African Government brought some relief to the poorest of the poor, but hardship visited the majority of South Africans.

The key strategic objectives contained in the RMI’s New Thinking Model - member value, brand awareness, research and thought leadership, advocacy and policy, regulatory and compliance, skills development and sustainability - infuse this annual report of the RMI. During the year under review, the Organisation continued to set clear best practice standards in both the formal and informal sectors, proactively engaging in key industry issues on behalf of members and consumers, while offering expert Industrial Relations advice to RMI members.

Member value won hands down in the last quarter of the year with regular publications of the COVID Monitor and the concerted effort of both the RMI and its Associations in engaging government to ease Industry back into operation as quickly as possible without compromising the health of workers and consumers.

Employers received contribution relief from the Motor Industry Retirement Fund, Sick-, Accident- and Maternity Pay Fund and Moto Health Care Fund in the period under review. These

organisations managed to weather the storm beyond expectation. The RMI also gave through a generous subscription discount to members and stringent cost-cutting measures were implemented in the Organisation to help weather this storm.

MIBCO, the implementation structure of the Main Agreement, struggled more than ever before in this year under review. Stakeholder relations are at the lowest point in a decade. This is crippling the operational efficiency and financial sustainability of the organisation. The RMI CEO, with the support of the RMI Board and Labour Executive Committee, is focused to resolve this untenable situation as quickly as possible.

The RMI CEO and his team, including the RMI Associations and the RMI Board of Directors with its various sub-committees did an amazing job to keep the Organisation on track during these trying times. My heartfelt gratitude to each member for giving up their time to serve selflessly in the RMI structures and provide strategic direction to the RMI team.

Looking ahead, one has to ask which markets will see a boom post-pandemic season. Martha Stokes, the Co-Founder and CEO of TechniTrader, notes, "History is a good way to determine where the next growth of industries and where in the New Economy that will evolve from this pandemic.

The Spanish Flu of 1918 -1920 devastated the global economy at that time along with World War One. It infected about 30% of the population of the world at that time which was about 1.5 billion people.

That pandemic ended and a whole new Economy evolved out of the Industrial Revolution of that era. Manufacturing of home electric appliances and kitchen electric gadgets, emerged as more homes had electricity for the first time.

Fast forward 100 years. The world has another devastating pandemic that has severely damaged the current economies. However, a plethora of new technologies are coming to market even faster than would have happened without the pandemic.

As human workers become a huge liability for corporations, Robots, Robotics, Humanoid Robots, DLT, Blockchain, Sensors, Solar Energy, autonomous vehicles, Dark Data Mining, Augmented Reality Analysis for Diagnostics and Research, New types of machine learning and new technology in Artificial intelligence, and much more is being called: The 4th Industrial Revolution.

Once the pandemic has run its course, the survivors are in for a roller coaster ride of new displacement technologies that will be amazing for investors and traders, but damaging to wage earner employees.

The markets are not likely to see a huge broad boom until the pandemic is truly tamed and contained. Right now, as I write this, Europe is locking down again and this will ripple across all financial markets to some degree.

Business is resilient enough in South Africa to adapt and find new business opportunities in the technology revolution that is upon us. We already see many success

stories flowing from a younger, more diverse generation of business owners. The magnificent bundle of new technologies makes it impossible to be excused from learning how to diversify, adapt, and remain sustainable into the future. However, the voice of business when crafting government strategy is now more crucial than ever before. Even the smartest solutions can be biased and fallible. We must not fail in our duty to bring in a younger generation to be mentored into serving meaningfully on the RMI structures.

In a time of so much uncertainty and change, it is our actions that will determine the trajectory of this organisation and our businesses. Technologies of the Fourth Industrial Revolution must be leveraged by visionary leaders in a world that is left a better place for all.

To the RMI CEO, Mr Jakkie Olivier, the RMI Management team, and every employee, thank you on behalf of the RMI Board for a job well done under challenging circumstances.

I commend the RMI Board of Directors and the Vice President, Frans Maritz, for their unfailing expert guidance and support during this year.

Lastly, thank you to our member businesses, government departments, international organisations, and the SETAs for making it possible for the RMI to make a tangible impact in the economy of South Africa.

Overview



by Jakkie Olivier Chief Executive Officer

It is my pleasure to present the 2019/2020 RMI annual report, which offers an executive summary on the Organisation's many and varied activities during the period 1 July 2019 to 30 June 2020.

It was a year marked with renewal, change, and new and unique challenges. However, I am pleased to report that, despite being on the receiving end of many proverbial curve balls during the year, the RMI managed to stay focused and performed exceptionally well, financially and in the various business activities of the Organisation and its Associations.

During the first half of the financial year, the RMI excitedly prepared for the new decade with the introduction of a modern, new corporate identity and logo as well as new logos for all our Associations. The previous RMI logo had been designed and implemented in 1999 and, as the industry had changed

drastically since, it was apt for the RMI to re-think its positioning, identity, and suite of products and services to ensure we would continue to meet the demand of members and the new generation of entrepreneurs in the new decade.

The second half of the financial year was certainly defined by extra-ordinary circumstances and unique challenges and was dominated by the global COVID-19 pandemic.

The pandemic and resultant national lockdown exacerbated the economic woes that were already evident in 2019. The hard lockdown had a severe impact on all economic and business sectors, and the full recovery of the automotive industry and the return to normal trading conditions and pre-lockdown turnover and profitability will take time.

The ripple effect of the pandemic will also continue for the foreseeable future. In preparation for the new financial year that commenced on 1 July 2020, the RMI conservatively estimated that 15% (about 3 000) of businesses in our industry could possibly close over the next 12 months as a direct result of the COVID-19 pandemic. Many jobs have already been lost through retrenchments and business optimisation programmes, and the RMI estimates that this will total out at about 30 000 over the next year.

While the pandemic will no doubt continue to have a severe impact on the economy and automotive industry for a considerable time, we also believe that opportunities will present themselves, as the industry adapts to the so-called 'new normal'.

In terms of the 'new normal', we see opportunities for the RMI to introduce a 'work-from-home' concept, inclusive of a fully operative digital platform. Virtual meetings, seminars, webinars and conferences have already taken effect at substantial cost reductions, with the added benefit of substantial savings on travel expenses. Through online platforms, such as Zoom and Microsoft Teams, information sharing with members, instant communication and active participation by member businesses and stakeholders could create new efficiencies. The RMI has been at the forefront of implementing virtual platforms as part of its communication strategy going forward.

Through its COVID-19 MONITOR newsletters, the RMI successfully guided, informed, interpreted and provided valuable information to the membership base on COVID-19 related topics. More than 150 such COVID-19 MONITOR circulars were distributed from March 2020 to 30 June 2020 and continues as more and new information is released by government authorities. At the same time, the RMI and its Associations successfully assisted the industry with workplace readiness and risk assessment plans and documentation to ensure full compliance with all health protocols during the various lockdown levels.

As I noted at the outset, the RMI and all its Associations performed exceptionally well financially at the 30 June 2020 year-end, despite the impact of COVID-19, and has accumulated healthy reserves over the years. Some of these reserves were put to good use when the RMI Board approved a 35% membership fee subsidy for the financial year 2020/2021 as a financial relief package for members.

The RMI, in close co-operation with NAAMSA, successfully presented and convinced government to bring forward the reopening (albeit partial) of the automotive industry from Level 2 to Level 4. This achievement saved the industry from a certain financial disaster. Thousands of small business closures and even more thousands of jobs were on the line if the industry remained closed until Alert Level 2.

Good progress was made by the RMI's Transformation Committee during the year. The RMI's Position Paper on Economic Transformation in the Motor Industry was launched in November 2019, while the Code of Conduct for the National African Association for Automobile Service Providers (NAAASP) was also finalised during the year.

A memorandum of agreement was signed with Seda for a 3-year Mentoring and Coaching Training project, which will be rolled out in 2020-2021. The year also saw another important milestone: the pilot project of the New Venture Creation program in conjunction with merSETA in Gauteng.

On the Training front, the RMI's Training Committee took a pro-active approach to the DHET's Minister's mooted plans to revisit

South Africa's Skills Development and Training guidelines, and also commenced with the development of a framework for the digital remodelling of lifelong learning. The COVID-19 pandemic impacted on job opportunities for apprentices and learners and the RMI therefore started engaging with merSETA to help find suitable workplaces for the completion of the training programs of affected learners and apprentices.

Progress continued in the establishment of the retail motor industry professional body, which will allow for student members (new employees in the industry) as well as designated members to accumulate Continuous Professional Development (CPD) points through relevant industry training sessions.

Through its regional presence, the RMI continued to support members in the areas of Consumer Affairs, Industrial Relations, and Training and Events. While the pandemic resulted in slight shifts in the support required by members, our teams did a sterling job, under trying circumstances, to support and guide members through these uncertain times.

With the ever-increasing number of regulations and compliance issues, the RMI's Regulatory Compliance Department continued to provide members with invaluable assistance in managing the risks and challenges associated with quagmire of government compliance guidelines and requirements.

Our Compliance Department also continued its strong working relationships with the SABS and the National Regulator for

Compulsory Specifications (NRCS). Project Compliance, which was launched in the previous financial year to curb illegal businesses in the industry, continued, while a new Lifting Equipment Regulations project was launched during the year. The year also saw the appointment of a new service provider for members in respect of the important area of Occupational Health and Safety (OHS).

While I am only providing a high-level overview of some of the areas in which the RMI has been actively improving and strengthening our industry, our members' businesses and the safety of the general motoring public, it hopefully highlights the RMI's continued and total commitment to our members, our industry and our country. As an Organisation, we continue our single-minded focus on delivering on our promise to business that Belonging (to the RMI) is Better Business and for consumers that Our Voice is your Peace of Mind.

Thank you to our Members for trusting the RMI to further their business interests and to the various automotive stakeholders and service providers for working towards a better industry for all.

Thank you again to the RMI Board, our committee structures, Associations and Regions for their valued contributions, and to the dedicated staff members at the RMI for their efforts and hard work.

And last, but certainly not least, a heartfelt thank you to RMI President, Jéanne Esterhuizen, for her leadership and guidance in the proverbial 'interesting' times in our industry and in our country.

Economic Overview



The year under review was marked by economic downturns and nosedives, a pandemic and an unprecedented emergency landing for the economy.

The second half of 2019 saw a technical recession in South Africa, and our country's economic downturn continued in **Quarter 1 2020**. This is evidenced by data on key economic indicators, including sharp contractions in manufacturing and mining output, sharply lower sales of new passenger vehicles and weaker retail sales.

However, the economy nosedived at a historic pace in **Quarter 2 2020**, as Covid-19 lockdown measures slammed the brakes on activity, with capital and

household spending plunging as businesses and consumers deferred non-essential purchases. According to *Trading Economics*, South Africa fared worse than any developed or major emerging economy in Q2 of 2020.

During what might perhaps one day be termed as *pandemic quarter*, South Africa's economy suffered a significant contraction during April, May and June, when the country operated under widespread lockdown restrictions in response to Covid-19.



Gross Domestic Product (GDP) fell by just over 16% between the 1st and 2nd quarters of 2020.

7.5%

decline forecasted for South Africa's GDP

3,000

jobs shed in the formal non-agricultural sector during the 1st quarter of 2020.

10.2m

persons employed in the formal non-agricultural sector in South Africa.

According to the Quarterly Employment Statistics (QES) survey released by Statistics South Africa (Stats SA) at the end of July 2020.

In early June 2020, the retail automotive sector was re-opened, as the country fended off the first wave of the virus. The masked measures under Alert Level 2 started to pave the way for regaining economic momentum.

At the RMI's financial year-end, economic activity was reviving, as countries around the globe were starting to ease lockdown restrictions imposed earlier in 2020. The extent of the recovery remained uncertain, especially in light of the considerable risk of a second wave of viral infections.

Given the extraordinary nature of the 2020 global economic crisis and associated uncertainty, growth forecasts remain fluid.

Job losses are expected to continue throughout the year, resulting in a substantially higher unemployment rate by the end of 2020. The severity of the economic recession will also be reflected in a steep drop in fixed investment activity. On the external front, a weak global trading environment and disrupted supply chains pummeled exports.

Historical data from 1960, sourced from the *South African Reserve Bank*, show that the second quarter of 2020 experienced the biggest fall in GDP since that year, far steeper than the annualised 8,2% decline in the fourth quarter of 1982. The contraction in economic growth dwarfs the 6.1% annualised slowdown recorded in the first quarter succeeding the 2009 global financial crisis.

The World Bank projects a

5.2%

contraction of the world economy in 2020

This is the worst recession since the Great Depression of the 1930s - followed by a potential rebound to 4.2% growth in 2021.

It cautions, however, that the outlook could be worse if it takes considerably longer to contain the pandemic.



Formal sector jobs rose by 3 000 in the first quarter, year on year. Although the economy has been re-opening under Level 3 since its introduction at the end of May 2020, various services-related activities (for example, restaurants, accommodation and other hospitality services, hair and beauty salons, entertainment services) still remained shut for a protracted period. This has had devastating consequences for numerous business enterprises in these sectors, many of which were forced to close down permanently.

StatsSA conducted three different surveys to gauge the business impact of the Covid-19 pandemic in South Africa. Below are some of the findings in the third survey, released at the end of June 2020.

Majority of responding businesses:

85.4%

reported *turnover below the normal range*.

19.6%

reported *laying off staff in the short term*.

38.2%

businesses applying for financial assistance *reported making use of government relief schemes*.

46.4%

indicated *temporary closure or paused trading activity*.

19.1%

reported an increase in cost related to material, goods and services.

30.6%

indicated they *could survive less than a month* without any turnover.

50.4%

expected their workforce to stay the same in the 2 weeks after the survey.

Access to financial resources:

54.0%

indicated they *could survive between 1 and 3 months*.

36.8%

expected their workforce size to decrease.

23.8%

indicated a *decrease in access*.

46.3%

were able to meet business demands.

28.3%

indicated their workforce had *decreased working hours*.

52.6%

indicated *access to resources remained the same*.

43.0%

were *not able to meet business demands*.

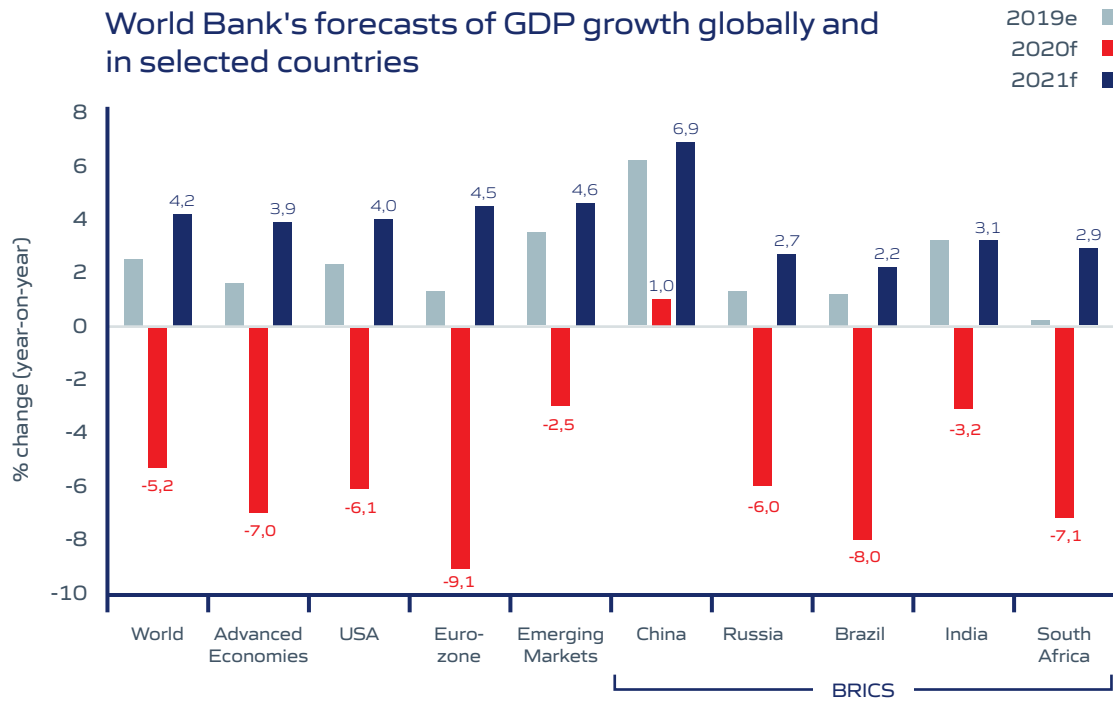


Figure 1: The world economy is in its worst crisis since the Great Depression.

Source: IDC, compiled using World Bank data

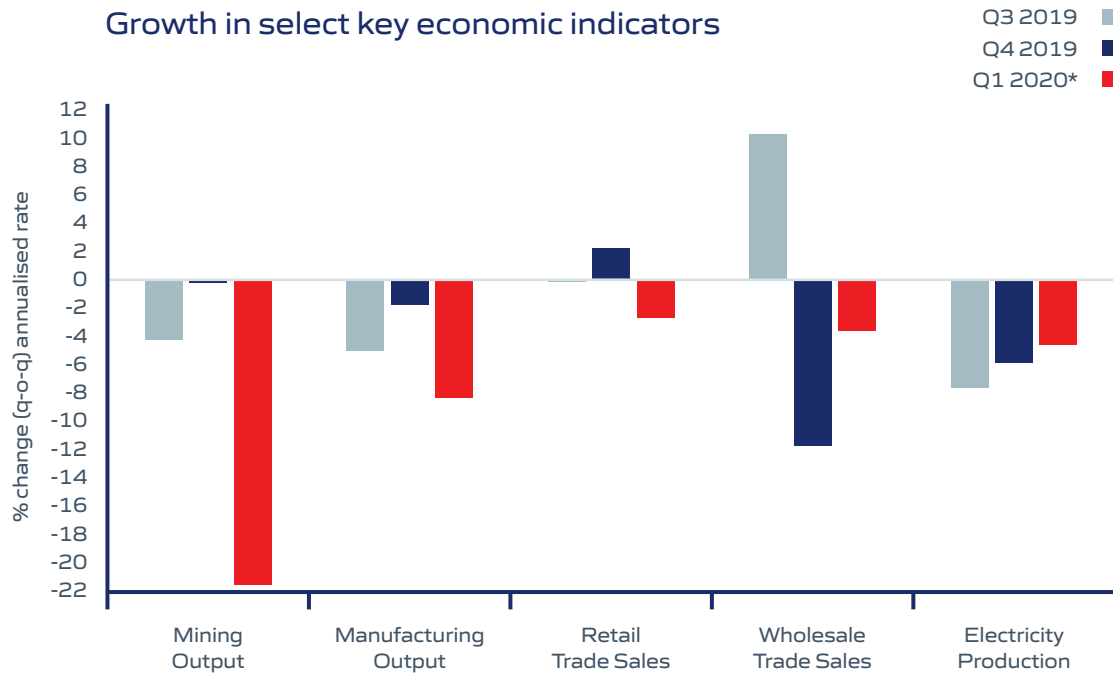


Figure 2: Economic conditions remained challenging at the start of 2020.

Source: IDC, compiled using SA Stats data. Note: *January & February 2020 for retail and wholesale trade.

Motor vehicle sales: domestic and exports

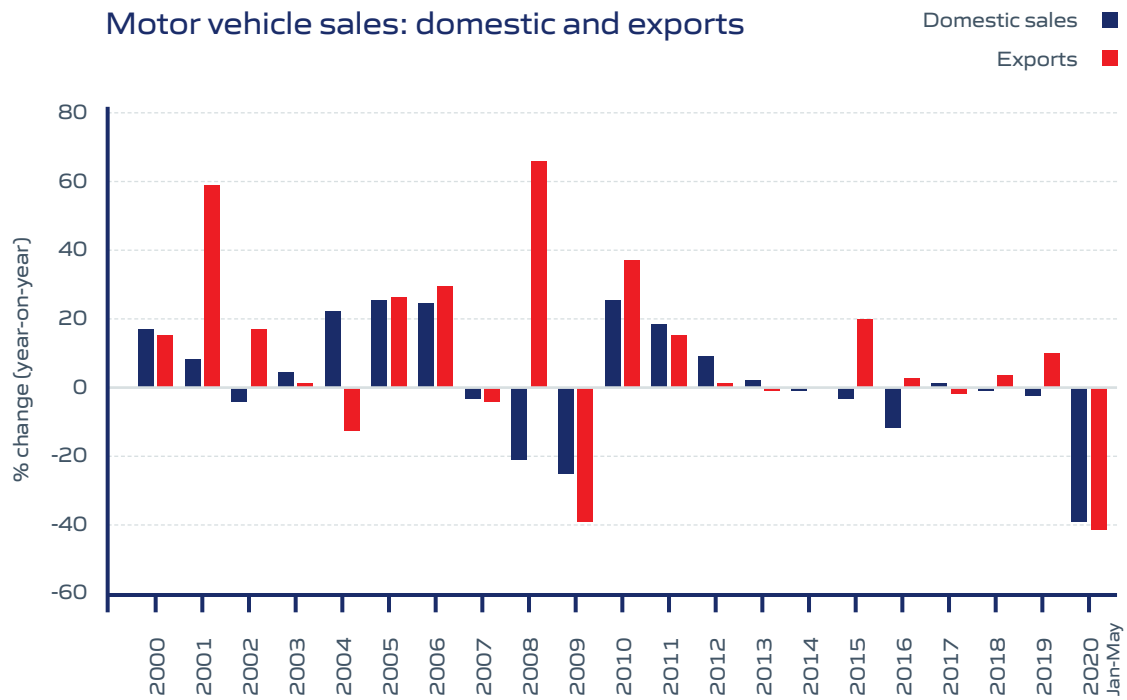


Figure 3: Vehicle sales plunged both in local and export markets

Source: IDC, compiled using NAAMSA data

Business confidence in South Africa

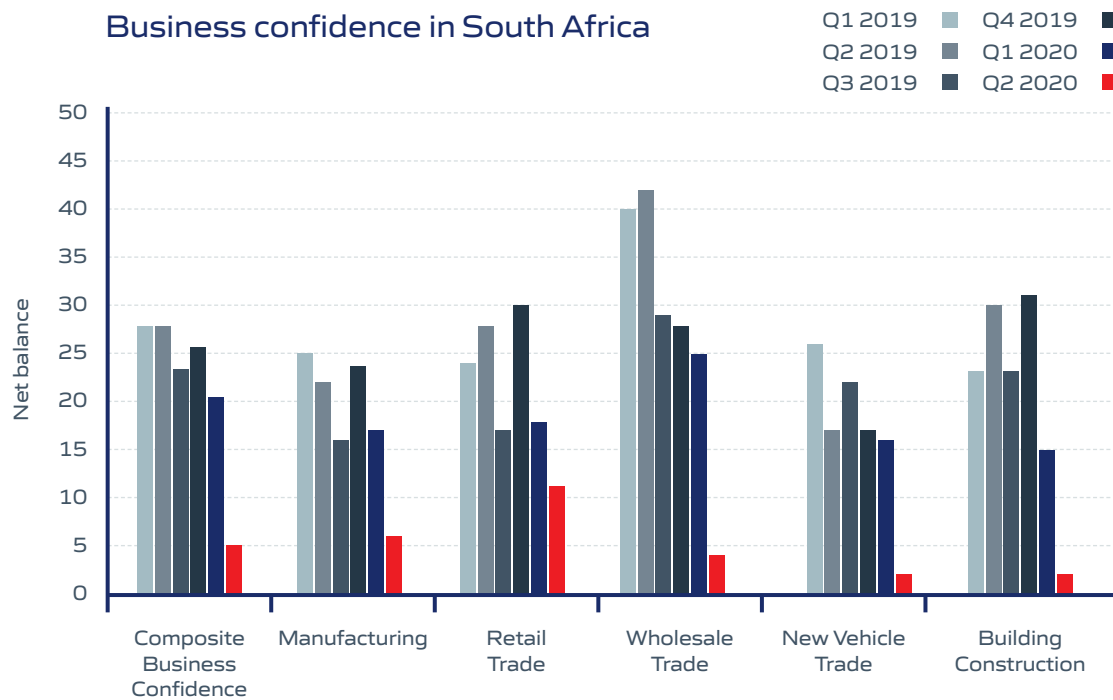


Figure 4: Business confidence at a record low as the lockdown takes its toll

Source: IDC, compiled using BER data



Steep drop in consumer spending

The lockdown of major parts of the economy, alongside strict restrictions on the mobility of individuals and their purchases over a considerable period has resulted in a steep drop in consumer spending, especially on durable and semi-durable items. Household consumption expenditure is forecast to decrease by 7.1% in 2020 and, despite an anticipated recovery in subsequent years, its rates of growth may remain quite subdued over the outlook horizon.

Very low levels of business confidence in the domestic economy, largely due to adverse trading conditions and production constraints, will impact negatively on private sector investment decisions, particularly in 2020 and 2021. Worsening public sector finances, in turn, will severely limit spending on infrastructure development by general government and key state-owned companies.

Retaining RMI membership will no doubt, as has been proven over the years, add value to member businesses during the turbulent times ahead.

Looking ahead

Looking at calendar year 2020, GDP is set to shrink notably, as feeble global demand continues to constrain the external sector and lockdown measures have hammered domestic activity. Weak fiscal metrics and elevated government debt levels, which threaten the country's credit rating, represent additional risks.

GDP is projected to decline by 7.5% in real terms in calendar year 2020, as domestic and global demand drop sharply and, on the supply-side, businesses

have been prevented from producing at normal levels. Significant production capacity is also likely to be permanently lost, particularly in the small to medium-sized enterprise segment of the economy.

In 2021, GDP is expected to rebound, as the global economy recovers from the pandemic. *FocusEconomics* panellists predict that the economy will shrink by 8.3% in 2020, before expanding 3.6% in 2021.

Overview of RMI Business Activities

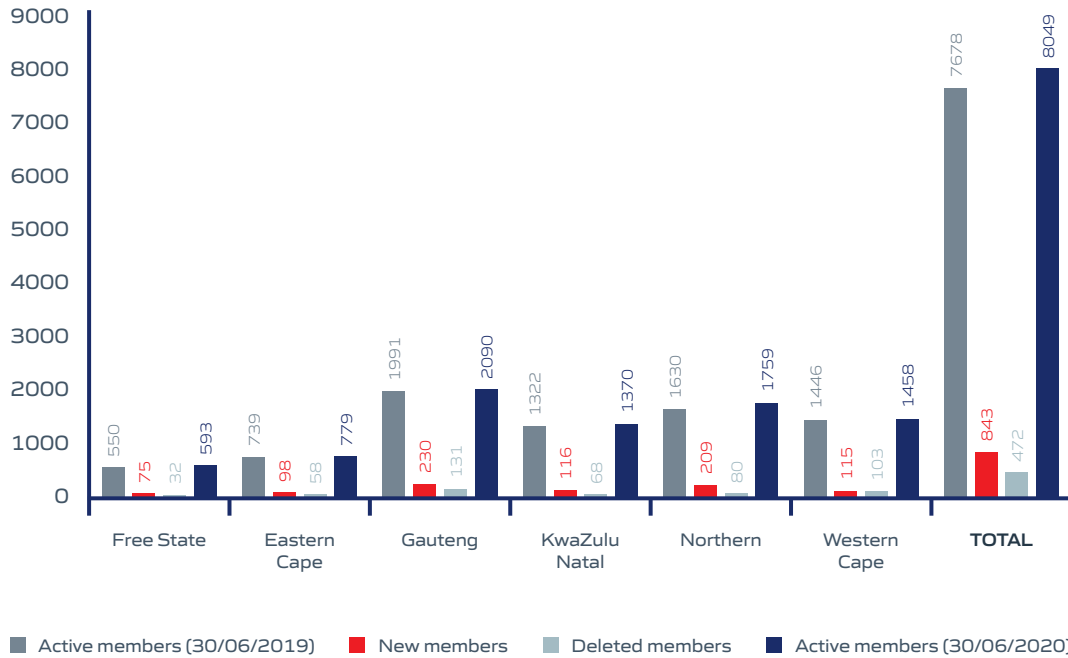


Membership

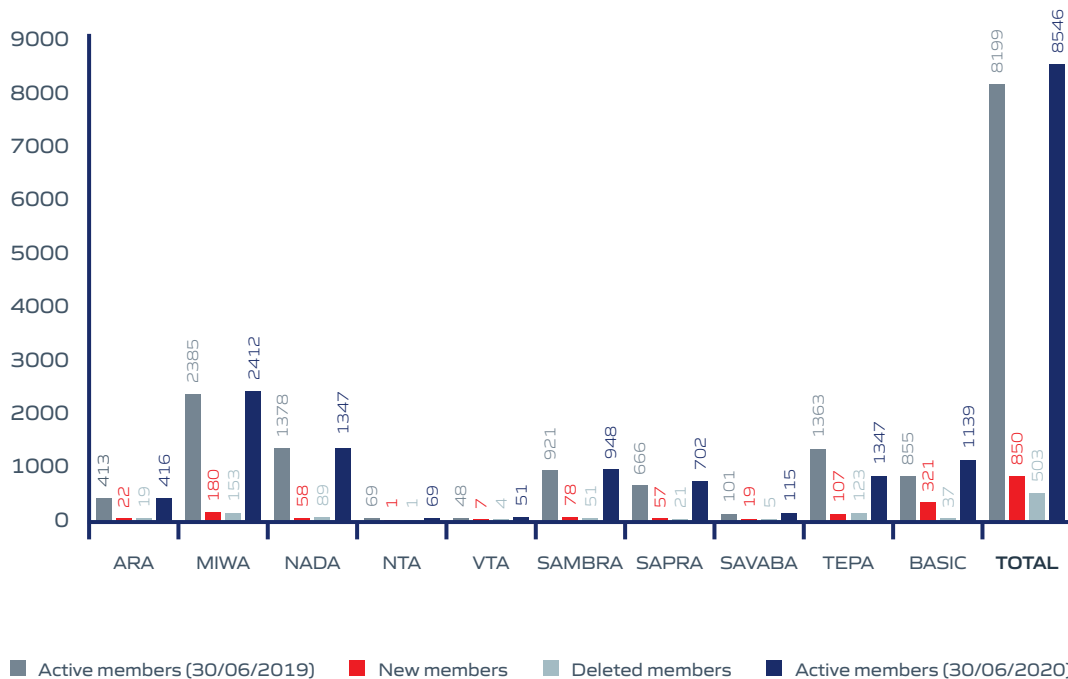
Membership growth of 4.6% was boosted by a Board decision to increase the focus on attracting more Transformation members to the RMI. The lower-than-expected growth is very reflective of the economy, where the majority of membership losses are attributable to business closures and consolidation.

The RMI is on an ongoing quest to grow its membership numbers in order to remain the collective voice for the retail motor industry sector. The need to remain relevant and strong has never been as necessary as now.

Regional Membership 30 June 2020



Associational Membership 30 June 2020



Consumer Affairs

The RMI subscribes to a consumer dispute resolution dispensation that includes alternative dispute resolution through an Ombudsman. However, serious and ongoing concerns regarding the effective functioning and the equitable determination of levies payable by industry towards the funding of the Ombud has necessitated the procurement of intervention by the National Consumer Commissioner and the Minister of Trade and Industry in order to aid the future restoration of the proper functioning of the Motor Industry Ombudsman of South Africa (MIOSA).

With the first 5-year term of the MIOSA ending on 31 December 2019, the RMI engaged with the

Department of Trade and Industry with the view of securing amendments to the South African Automotive Industry Code (published under the Consumer Protection Act, 2010). Engagement between the parties is ongoing and progress will be reported on as and when it occurs.

The RMI continues to provide a valuable consumer facilitation service to its Members and consumers at large. A settlement rate of nearly **95%** of all consumer disputes and complaints referred to the RMI's various regional offices, was achieved. The table below indicates the number of official and formal referrals dealt with by the highly skilled team of consumer affairs

Consumer Affairs Department: 2019 - 2020

Date	Member Complaint	Non-Member Complaint	Court/ SCC/Legal Matters	Advice	MIOSA Reply	Member to Member Complaint	Total	Laid Formal Complaint	Paid/ No Charge
Jul. 2019	176	24	0	175	0	0	375	19	78
Aug. 2019	242	31	0	209	2	0	484	24	123
Sept. 2019	143	33	0	42	0	1	219	3	9
Oct. 2019	127	42	0	145	0	8	322	12	26
Nov. 2019	205	83	0	149	1	13	451	15	89
Dec. 2019	159	71	1	122	0	10	363	12	63
Jan. 2020	134	31	1	92	2	8	268	11	56
Feb. 2020	118	36	0	77	0	0	231	35	25
Mar. 2020	137	39	0	132	0	4	312	32	79
Apr. 2020	176	47	0	239	0	2	464	51	97
May. 2020	172	41	0	185	0	5	403	47	87
Jun. 2020	159	25	0	197	0	4	385	60	102
Totals	1948	503	2	1761	5	49	4268	321	834

specialists deployed throughout the country. These official and formal complaints constitute a small portion of the approximately 18 000 informal and telephonic complaints and queries that are resolved annually by the staff of the various Regional Offices.

Transformation

The RMI Transformation Committee consists of Transformation Director, Noni Tshabalala, Ferose Oaten, Jakkie Olivier, Jeánné Esterhuizen, Jan Schoeman, Johan Coetzee, Gary McCraw, Sello Andrew Molemela, Stewart Vambe, Graydon Epstein, Nina Mgudlwa, and Mike Goltman.

NAAASP

- **Code of Conduct**

The Code of Conduct for the National African Association for Automobile Service Providers (NAAASP) was finalised during the year and was disseminated during the year at the various NAAASP and Seda roadshows.

- **Financial Assistance for NAAASP Members**

In a quest to find a blended grant or fund to assist NAAASP members, the RMI held a number of meetings with the Small Enterprise Development Agency (Seda), the Small Enterprise Finance Agency (SEFA), and the Small Business Development Corporation (SBDC). Sadly, the funding and grants were out of the reach of NAAASP members. The RMI therefore embarked on developing a tailored fund for automotive businesses in the rural and township areas.

- **Roadshows**

Very successful roadshows were concluded around the country with NAAASP members, attended by regional managers from the Seda branches in the various provinces.

Coaching and Mentoring

The RMI and Seda signed a memorandum of agreement for a **3-year Mentoring and Coaching Training project**, which will be rolled out in 2020-2021.

New Venture Creation Training

The New Venture Creation (NVC) program in conjunction with merSETA was piloted in Gauteng and the training of the first 42 entrepreneurs is on track, with participants enthusiastic about the programme.

A new skills development provider, Bonview Consulting Services (Pty) Ltd, was also appointed early in 2020.

The RMI was instrumental, in conjunction with a joint-venture health and safety provider, to assist members of the NVC pilot group to complete and submit a bulk application for an online learning programme in Covid Workplace Safety under the Small Medium Enterprises Discretionary Grant 2020/2021 window period.

RMI Position Paper

The RMI Position Paper on Economic Transformation in the Motor Industry was launched in November 2019, with key government representatives from the Department of Trade and Industry (dtic), Seda, SEFA, merSETA, and the Automotive Industry Development Centre (AIDC) in attendance, as well as decision-makers in the private sector.

The position paper identifies the guiding principles for the RMI on BEE, business response and the desired end-state of a deracialised economy that seeks to broaden and deepen economic benefit and participation. The gap between the desired end-state and the current status is examined with a view to identifying the key shifts required by businesses that belong to the RMI to meaningfully participate in and enable inclusive growth and employment.

The key hallmarks of this approach are to achieve and maintain a competitive economy and ensuring the long-term sustainability of members.

RMI NVC and the NAAMSA AITF

The RMI has embarked on discussions with Deloitte to explore a collaborative effort between the NAAMSA Automotive Industry Transformation Fund (AITF) and RMI New Venture Creation programme.



Women in Transport Empowerment Entrepreneurs Summit 2019

The Transformation Director attended this event. The keynote speaker was the National Deputy Minister of Transport, while the RMI's Transformation Committee member, Ferose Oaten, also gave a presentation.

Transformation Committee and BBBEE Revised Codes

In an effort to support the achievability of Broad-based Black Economic Empowerment (BBBEE) compliance and verification processes for both RMI members

and Associations, the RMI has engaged with dtic with regard to the clarification of certain new and current amendments to the BBBEE Revised Codes.

RMI Employment Equity (EE)

The RMI is compliant in terms of the Employment Equity (EE) requirements prescribed by the Act. The RMI's Transformation and HR departments have fulfilled the requirements of the Employment Equity Act and plan and have submitted a progressive Annual Employment Equity report.

The RMI's internal Employment Equity Committee members have elected new members for the ensuing term. Vishal Premalal and Jeffrey Molefe have been elected as Chairperson and Vice-Chairperson, respectively. Other members of the Committee are Madoda Sonwabo, Pieter Niemand, Noni Tshabalala, Marks Mokone, Gugu Nzama and Jessica Leyds. Giselle Schoeman was elected as the Committee scribe. The validity of the membership is in accordance to the internal EE Committee Terms of Reference.

Training

"An organisation's ability to learn, and translate that learning into action rapidly, is the ultimate competitive advantage."

– Jack Welch, former General Electric CEO

Gearing to address identified strategic industry skills development and training topics

The RMI has taken a proactive approach to the DHET Minister's mooted plans to revisit South Africa's Skills Development and Training guidelines and compiled a list of strategic matters and action items relevant to the scope of the RMI membership. These include, among other items, the establishment of an Industry Education Forum in conjunction with the relevant SETA, new and improved curricula for online and e-Learning solutions to deliver skills development and training programs, employer education on skills development and training benefits, and ways to accelerate the alignment of OEM and automotive aftermarket skills development and training.

Framework for digital remodelling of lifelong learning and work

The RMI's National Education and Training Committee (NETC) has commenced with the development of a framework for the digital remodelling of lifelong learning. Some of the objectives include creating an

agile and adaptable workforce, upskilling, reskilling, and multiskilling staff, and the development of skills for job creation, economic growth and poverty reduction.

International and local liaison

The Covid-19 pandemic has fast-tracked the world into 4IR and digitalisation. The RMI has therefore embarked on affordable, credible and reputable e-Learning and virtual learning solutions for members with various local and international service providers.

The inter-relatedness of Skills Development and the BBBEE Codes of Good Practice

The RMI NETC is working together with RMI's Transformation Committee on this matter.

Covid-19 pandemic and completion of learning programs

Apprentices and learnerships have been negatively affected by the Covid-19 economic downturn. The RMI is therefore engaging with merSETA to assist 'orphaned' apprentices and learners. The National Executive Training Committee is investigating the establishment and role intermediary organisation can play to coach or mentor 'orphaned' apprentices and ensure successful completion of current training programs. Workplaces are also called on to take on 'orphan' apprentices, as workplace exposure is an important component of their training.

The RMI's continued involvement in the Department of Higher Education and Training's (DHET) Centres of Specialisation project

The RMI is the appointed organisation for the DHET's apprentice training project for Automotive Motor Mechanic and Diesel Mechanics. To this end, the RMI's Training Director acts as the Occupational Team Convener for the Automotive Motor Mechanic trade at the College of Cape Town and the Port Elizabeth TVET College and Christo Basson as the Occupational Team Convener for the Diesel Mechanic trade at Orbit TVET College and Mopani South TVET College.

New Venture Creation pilot project

The RMI and merSETA joined forces on this training programme, which is registered as a NQF Level 2 Learnership with the Services SETA. A pilot programme was launched in Gauteng with 42 owners (directors, sole proprietors, partners or members) and managers from the RMI's National African Association of Automobile Service Providers (NAAASP).

Creation of Automotive Components Chamber at merSETA & Accounting Authority (AA) appointment

The RMI was allocated 2 seats on this newly-established sixth chamber at merSETA, named the Automotive Components Chamber. The Training Director and Christine Phoko, based at Bosch SA in Brits, represent the RMI in this chamber. The RMI President has also been appointed for her fourth term as a merSETA Accounting Authority (AA) member, while the RMI Training Director has been appointed for this first term.

All Hands on Deck skills summit

The All Hands on Deck skills summit, which was presented as part of *Automechanika 2019*, explored aspects of the National Skills Development Plan (NSDP) relating to the retail motor industry and how to establish it as the industry of choice for young South Africans and business employers' of choice.

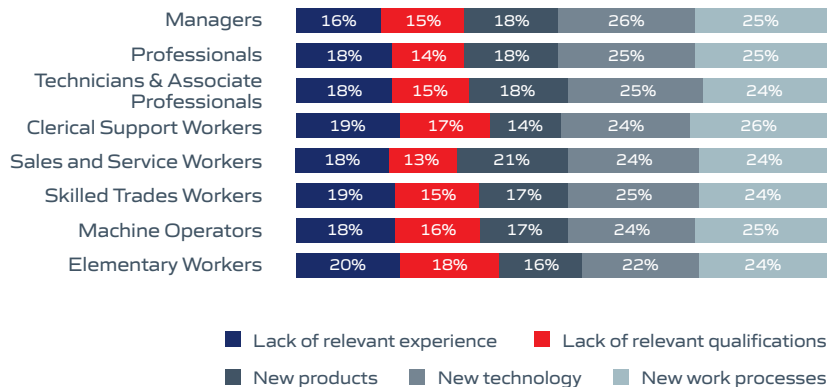
Some of the suggestions brought forward at the summit included incentivising industry to develop better relationships with public Technical and Vocational Education

and Training Colleges (TVETs) for curricula development and to supply equipment, the creation of a Reskilling Fund equivalent to the UIF, and to provide career guidance at foundation, intermediate, and senior phases in the South African school system.

Sector skills planning – gaps and reasons

The 2021/22 Sector Skills Plan data collection process conducted by merSETA highlights skills shortages and reason for gaps in 8 occupational categories.

Reasons for Skills Gap



Establishment of the retail motor industry professional body

During the year, the RMI made progress in the establishment of the retail motor industry professional body. Stakeholder-consultative-sessions were conducted and unanimous support gained. The RMI and the Motor Industry Staff Association (MISA) also engaged in this matter.

The professional body will allow for student members (new employees in the industry) as well as designated members to accumulate Continuous Professional Development (CPD) points through relevant industry training sessions. A suitable electronic member management information system was identified and needs to be tested for a minimum of 6 months before the launch of the professional body. However, the Covid-19 pandemic has pushed back both the operational demonstration phase and the launch. This is due for review by the RMI Board in Q4 2020.

Regional Highlights

Western Cape Region

The financial year's promising start and the encouraging trends for the Region were cut short by the rise and spread of the Covid-19 pandemic and its subsequent impositions on business. The Region adapted in the best way that it could in response to each successive phase of the restrictions.

Industrial Relations

The two Regional IR Specialists, Johanita Olivier and Brent Barichiev, received and dealt with 283 disciplinary enquiries, 39 arbitrations (CCMA and DRC) and 42 conciliations and conciliations/arbitrations (CCMA and DRC). They conducted 10 IR Seminars and travelled more than 24 500 kilometers in the course of duty.

The demand for IR Services, like most other services, declined sharply with the introduction of the national lockdown. As the lockdown levels were eased, there was a slight uptick in demand. IR queries from members also shifted from the usual employee-misconduct transgressions to dealing with the effects of the lockdown, such as the implementation of short-time, reduced wages, and retrenchments.

Due to the pandemic, hearings were conducted remotely, with overall satisfactory results.

Consumer Affairs

Deon Rademeyer, the Region's Consumer Affairs Officer, dealt with 850 consumer complaints during the year, of which 806 involved RMI members and 44 related to non-members. Of these cases, 128 resulted in formal complaints.

In certain instances, and especially where the complaints were of a technical nature, the Consumer Affairs Officer questioned the rulings made by the MIOOSA, and these were referred to the MIOOSA case managers, which were resolved amicably.

Meetings

There were three Regional Executive Committee Meetings during the period under review.

RMI delegates attended five MIBCO regional meetings and also attended two Department of Labour UIF meetings as representatives for business.

Training

The two IR Specialists attended the annual Labour Law Reports seminar in August 2019, and the Consumer Affairs Officer attended a course in Alternate Dispute Resolution in February 2020, while the Receptionist attended a First Aid course.

The two IR Specialists presented 10 seminars before the lockdown restrictions imposed a ban on such gatherings. Toward the end of the period under review, opportunities for remote presentations to RMI members were being explored.

Eastern Cape & Border Region

The national lockdown has had a crippling effect on the economy and an already sluggish motor industry and the Region continued to assist members to help secure the future sustainability of their businesses.

Industrial Relations

The Region was supported by IR Specialist, Eckhardt Oelofse, for the full year, while Nolu Mjila assisted until she left our employment in October 2019.

During the year, the Region attended to 181 disciplinary enquiries, 15 arbitrations (CCMA and DRC) and 18 conciliations and conciliations/arbitrations (CCMA and DRC) and 58 consultations. They conducted 4 IR Seminars and travelled more than 28 000 kilometers during the year. Eckhardt drafted 6 jurisdictional matters, made 1 Labour Court appearance, and achieved a 100% success rate at the DRC and CCMA.

Consumer Affairs

The Region facilitated Consumer Complaints as an ADR (Alternative Dispute Resolution) centre, and the function was ably handled by Eckhardt Oelofse. In the period July 2019 to June 2020, the Region handled 113 consumer complaint queries, of which 100 were related to members of the RMI and 13 to non-members.

Of the 100 member-related complaints, 25 chose to follow the ADR process. There was one member-to-member complaint and 42 complaints were handled telephonically. Noteworthy is the increase in members seeking advice and assistance with consumer complaints, both before and after logging them at the MIOSA and the National Consumer Commission and National Consumer Tribunal. There were 16 such cases recorded.

Meetings and Retention

The Region held four Regional Executive Committee Meetings during the period under review, along with the EP and Border AGMs in October 2019. The Region also held 4 MIBCO Meetings along with 4 Pre-MIBCO Meetings.

The combined efforts of the Mobile Staff resulted in 1 075 member contacts during the year, ranging from business visits to telephonic assistance and IR assistance.

The Region also attended two South African Reserve Bank Monetary Policy Meetings, a SDF Forum Session, two DoL UIF Regional Appeals Committee Meetings, and two Automotive Industry Development Centre (AIDC) Industry Business Growth Strategy Meetings.

The Region also met with HV Consultants (Pty) Ltd. regarding the opening of the New Trade Test Centre in Port Elizabeth and met with SARS regarding 'Project Clean-up' of Non-Compliant Businesses in the Metro. The Region attended an iBhayi Small Business Chamber Network meeting, a PE College DHET Centre of Specialisation Motor Mech meeting and a DoT and Post Office Vehicle Registration Process meeting, as well as a new host site invitation meeting with Siyaya Skills Institute. In addition, the Region attended a Business Satisfaction and Interest Survey at Nelson Mandela Municipality (NMU), a Batteries and Electric Car Conference at NMU, the A21 Digital Guidelines

Road Show, a Harambee Youth Employment Accelerator Programme, and a Labour Law Seminar.

The Region presented OHS Training in both East London and Port Elizabeth, presented a Motor Mech Show and held a meeting with the Eastern Cape Department of Transport to address the RMI and Associational requirements for meeting DoT Tenders.

Training

The Region attended a partnership initiative of the German Handwerkskammer (Chamber of Commerce) and TVET Colleges in Eastern Cape.

Northern & Highveld Regions

Industrial Relations

During the year under review, our IR Specialists, Tsepo Mohlakoana and Phuti Manamela, rendered IR services for our members in the Northern and Highveld Regions, respectively.

In the Highveld Region, Phuti Manamela (who left the RMI at the end of March 2020) and Jeff Molefe dealt with 97 disciplinary and grievance hearings, 12 arbitrations (CCMA & DRC) and 16 conciliations (CCMA and DRC), 11 Ill-health Incapacity inquiries, 6 Rescission and Variation applications, 28 MIBCO Claim cases and provided 86 consultations. They conducted 5 IR Seminars and travelled close to 13 000 kilometers in the course of duty.

In the Northern Region, Tsepo Mohlakoana dealt with 85 disciplinary and grievance hearings, 6 arbitrations (CCMA & DRC) and 17 conciliations (CCMA and DRC), 7 Ill-health Incapacity inquiries, 1 Rescission and Variation applications and provided 4 consultations. He conducted 2 IR Seminars and travelled over 18 500 kilometers during the year.

In addition, our IR Specialists provided professional telephonic advice on the provisions of the Main Collective Agreement and applicable labour legislations free of charge to our members. We are also proud of achieving 100% success rate at the DRC and CCMA.

Consumer Affairs

The RMI Highveld Region continued to provide a facilitation service with the view of resolving disputes between consumers and dealers, with the assistance of Consumer Affairs Specialist, Natasha Sewsunker.

The total recorded complaints for the year numbered 486, of which 215 were complaints against members, and 162 complaints against non-members. 215 facilitation/mediation sessions were held, and 109 members received a free advisory service.

The Northern Region was supported by Consumer Affairs Specialist, Tumisho Lekoloane, who dealt with 723 recorded complaints. There were 544 complaints against members, 267 member-to-member complaints and 334 facilitation/mediation sessions. The Region provided 359 free advisory sessions to members and assisted in 2 Small Claims Court/Civil Court matters, free of charge.

Meetings

The combined Highveld and Northern Regional Annual General Meeting was held on 11 October 2020 in Midrand. The meeting was well-attended and members were inspired by the presentation of renowned motivational guest speaker, Dr. David Molapo.

During the year, 7 other Executive Regional Committees Meetings were held.

MIBCO Meetings

Training

The Region organised and hosted OHS Training Courses as well as Entrepreneur Learnership Development sessions.

The Region was also actively involved in the Department of Labour's Employment Equity Workshop, the 2019 Annual Labour Law Seminar (presented by South African Labour Law Reports), Small Business Institute Indaba, NEDLAC Summit 2019, Department of Environmental, Forestry & Fisheries Workshops, Automechanika 2019, NAAMSA Conference, 2019 Manufacturing Indaba, Productivity SA and the 2019 Festival of Motoring.

MIBCO Regional Council Meetings

As a Party to the Motor Industry Bargaining Council (MIBCO), the office-bearers and officials of both Regions represented the interests of members at the MIBCO National and Regional Council Meetings. During the period under review, the Highveld and Northern Regions held 5 separate MIBCO Regional Council Meetings and attended the MIBCO Annual General Meeting on 7 November 2019.

KwaZulu-Natal Region

A highlight of the year was the Region's move into RMI-owned offices in Umhlanga.

Despite the Covid-19 pandemic and the impact on our members' businesses, the Region was fortunate to retain most of its membership.

Industrial Relations

The Region's IR Specialist, Janina Kalidass, dealt with the following during the year: 138 hearings, 11 disputes/arbitrations and 13 conciliations/arbitrations, 15 consultations and 3 jurisdictional issues. She made 1 Labour Court appearance.

In the course of her IR duties, she travelled over 16 500 kilometers.

She conducted one IR Seminar, with the three remaining seminars cancelled due to the pandemic and ensuing lockdown.

Consumer Affairs

The Region received in excess of 550 consumer complaints. Most of these were handled telephonically and were successfully resolved.

The Region recorded 296 Consumer complaints during the year in review, and achieved a success rate of 90%. We were successful in assisting our members in resolving cases with the MIOOSA, Small Claims Court, as well as general litigation. We also resolved cases between members.

Meetings and Retention

The RMI Regional Executive Committee held three meetings during the year as well as an AGM. The Region presented various Associational AGMs, including SADFIA/ERA/TEPA/ACRA, MIWA, NADA, NTA, VTA, SAPRA, SAVABA, and SAMBRA.

Other regional meetings and special meetings, included two meetings of the Natal Towing Association (NTA), two MIWA meetings, a NAAASP meeting, and two VTA meetings (one for members and one for industry). SAVABA held a meeting with dtic, SAMBRA held a member meeting, ARA/MIWA/TEPA/MIWA held a synergy meeting, and ARA held a special meeting. A presentation on the Consumer Protection Act (CPA) was also done for the KEY Group, as well as one at Bosch Tollgate.

MIBCO Meetings

Three Regional MIBCO meetings were held and one AGM.

Training and Events

Prinola Govender and Piet Marais attended a mediation course, while Julian Pillay attended the RMA-Class XIII COID Policy Renewals roadshow at the Gateway Hotel.

OHS training was provided for members, including Firefighting and First Aid training. The Health and Safety training scheduled for mid-February was postponed. Staff training on Covid-19 was also provided.

Events

Roadshows were scheduled to take place in the second half of the year, which were put on hold due to the pandemic.

RMI Golf Day

The RMI KwaZulu-Natal Golf Day was held at the Royal Durban Country Club on 23 August 2019, with 60 golfers.

Free State & Northern Cape Region

In a Region where the economy relies heavily on farming, the year under review started off positively, with good rainfall in September 2019, however, the Covid-19 pandemic and subsequent lockdown had an extremely detrimental effect on the economy, both locally and nationally.

Despite the pandemic, the Region had a busy year and appointed Marie Ellis as IR Specialist, joining Jacques Viljoen. The Region also bought a property in Westdene, which is the new regional home of the RMI.

Industrial Relations

The IR Specialists attended to 74 disciplinary enquiries, 30 conciliations and conciliations/arbitrations (CCMA and DRC) and 33 consultations, and travelled more than 19 000 kilometres. The team also drafted 1 notice of opposition regarding the application by the DOL for enforcement of a written undertaking in terms of S68 of the BCEA.

Consumer Affairs

The Region is fortunate to be assisted by consumer specialist Natasha Sewsunker, who dealt with 22 consumer complaints during the year, which is substantially less than the 50 received in the previous year. Of these, 19 were RMI member complaints, while 3 were related to non-members. All disputes were successfully resolved.

Meetings and Retention

The Region held three Regional Executive Committee Meetings during the period under review along with the AGM.

Other meetings held include two MIBCO Regional Council meetings, Regional AGMs for SAPRA, TEPA, MIWA, SAMBRA and NADA, a Free State/Northern Cape Regional EXCO meeting, Regional AGM, a UIF Regional Appeals Committee meeting in Bloemfontein, the inaugural meeting of the Regional Executive Committee, two SAMBRA General Meetings and a NAAASP roadshow.



MIBCO Meetings

The Region held three MIBCO Regional Council Meetings before the lockdown and before NUMSA refused to attend meetings if a resolution of a dispute with NEASA was not reached.

Training

Despite the challenges of Covid-19, the Region continued to support its members, especially during

the lockdown period when we assisted with the drafting of relevant communiqués.

During this time, the Region also provided assistance to members, some from other Regions, with TERS claims before an agreement was reached with MISA. The Region further saw a slight membership growth, despite the economic challenges.

Regulatory Compliance

The year under review has been another busy and productive year for Regulatory Compliance in providing insight into the variety of disciplines required for all businesses in South Africa and, more specifically, RMI members.

In general, compliance means conforming to a rule, such as a specification, policy, standard, or law. Regulatory compliance for organisations is therefore being aware of and taking the necessary steps to comply with relevant laws, policies, and regulations.

Due to the increasing number of regulations and the need for operational transparency, organisations are adopting the use of consolidated and harmonised sets of compliance controls. This is to ensure that all necessary governance requirements can be met without any unnecessary duplication. To this end, the RMI assists its members in managing the risks associated with compliance regulations and meeting the regulatory requirements.

The RMI Regulatory Compliance Department is continually vetting legislation, liaising with technical

experts in legislative processes, interacting with the National Regulator for Compulsory Specifications (NRCS) and the South African Bureau of Standards (SABS), monitoring processes and liaising with these organisations in an effort to protect the RMI's Constituent Associations and their members. It is further involved with occupational health and safety matters, both within the RMI and in respect of its members, and assists members with matters following DoL Inspections, Workmen's Compensation and Diseases legislation and all other compliance-related matters.

SABS

During the year under review, the RMI and the Constituent Associations continued to interact with the SABS and attended several technical committee meetings across various sectors within the SABS. The development of standards and the reaffirmation

of existing standards require specific technical inputs and individual representation of the Associations in question. This representation was solid on all relevant technical committees. During the pandemic, all meetings were conducted via online platforms, which has proven to be much more convenient and cost-effective and attendance and participation in technical meetings have greatly improved. It has also substantially reduced travel costs for the RMI and the Constituent Associations.

For the financial year under review, the RMI and its Constituent Associations attended a total of 12 technical committee meetings.

With the RMI having merged a number of its Constituent Associations at the end of 2019, the participating membership profiles of the old Associations need to be changed on the respective SABS Technical Committees (TC) and is an ongoing process.

The Standards Division of the SABS continues to be one of the key focus areas of the RMI in the maintenance of the integrity of the motor industry.

National Regulator for Compulsory Specifications (NRCS)

The strong relationship that has been forged over the years with key role players in the NRCS was maintained and has resulted in a better platform for members to voice their concerns.

The interaction from the NRCS has become more positive, and they are now more open to engage our members on issues, instead of making unilateral decisions.

The RMI attended a number of meetings on behalf of members, including:

- In August 2019 the NRCS held industry consultations nationally regarding a fee increase and members were encouraged to attend in all regions, while the Regulatory Compliance Manager attended a consultation in Durban.
- The NRCS invited the RMI and SAVABA to nominate representatives to serve on specific specialised Technical Committees. Nominations were submitted to NRCS on 20 September 2019.
- In October 2019, the RMI approached the NRCS to set up a meeting between the CEOs of both organisations to discuss issues facing the motor industry. The meeting was due to take place in 2020, but was disrupted by Covid-19.
- NRCS and SAVABA industry stakeholders met at the end of November 2019 and again at the end of June 2020.
- Hedley Judd was invited to assist on the interviewing panel for the position of Legal Metrology Manager at the NRCS.

- NRCS and tyre industry stakeholders met at the end of June 2020, with TEPA in attendance.
- In June 2020, the NRCS invited the RMI to participate in their Safer Vehicles Project 2025. The RMI accepted the invitation.

Government Departments

During the year, the RMI attended a 2-day meeting convened by the Department of Environment, Forestry & Fisheries (DEFF) entitled, Vision of State of Environment Reporting in the Information Age.

Other meetings include the DEFF's Waste Management Forum, Ministerial briefing on amendments, and the BUSA/NEDLAC meeting held in June 2020 regarding the AARTO Act rollout.

Special projects

- **Project Compliance**
Project Compliance was launched to assist in curbing illegal businesses within the industry, as there has been a marked increase in unscrupulous operators who conduct their business from unauthorised, private residential premises as well open public areas and pavements. This project is still ongoing.
- **Lifting Equipment Regulations**
This project is aimed at developing and planning a strategy to best address the issues regarding the interpretation of the laws and regulations of lifting equipment and its effects on our members.

The SABS TC1035 meeting was held at the end of October 2019, with MIWA, TEPA,

SAMBRA, and NADA present. This meeting was a valuable and constructive discussion regarding SANS 71. The main thrust of the revision of SANS 71 was to remove the reference to 'Load Testing' and to replace it with '**Performance Testing using a representative vehicle**'. Other changes to the existing construct of SANS 71 were also proposed, all aimed at reducing the cost of compliance and finding a method for a greater level of safety compliance to be applied by businesses in the industry.

- **Occupational Health and Safety service provider**
In November 2019, the RMI embarked on the search to find an alternative service provider for its members in respect of Occupational Health and Safety (OHS). As OHS is an integral part of any business, it was important to ensure that our members remain compliant and that they would be given the best support in achieving this. After months of searching and negotiating, a suitable provider was found and appointed.
- **RMI Business Continuity Plan (BCP) and Risk Adjustment Strategy (RAS) Internal Policy**
The aim was to develop a comprehensive policy for the RMI in respect of the re-opening of the regional offices in line with the regulations and guidelines contained in the disaster management Act 2020. The policy was approved towards the end of May 2020 and implemented from 1 June 2020, when the respective RMI offices reopened.

RMI Associational Activity Reports



Motor Industry Workshop Association



The Chinese word for crisis is frequently invoked in Western motivational speaking as being composed of two Chinese characters signifying both danger and opportunity. Although this interpretation is not strictly correct, the takeout message is that a crisis presents an opportunity to come back stronger.

No one could have predicted the unprecedented lockdown which was announced in March 2020.

Since then, our members have had to find and adopt new ways of doing business and have become far more adaptable and flexible in these challenging times. Part of the process was to re-evaluate various processes and tasks usually conducted by a full staff complement. It has given many business owners a new perspective and an opportunity to find a better way of operating. It also provided us with an opportunity

to improve our business without compromising on quality.

Focused priorities and projects for 2019-2020

MIWA developed a MIWA Strategic Plan with a specific focus on various strategic objectives.

Member Value Digitalisation platform

At the beginning of the year, MIWA announced its intention to launch a digital platform, in collaboration

Associations

On 1 July 2019, several of the existing Associations were amalgamated into new Associations, in an attempt to streamline especially the smaller Associations that share similar, basic goals.

ACRA, ERA and SADFA were combined to form ARA. MDA was incorporated into NADA, continuing forward with the same name. MIMA, MPEA and TDAFA joined together to form TEPA.



ARA



NADA



TEPA

It is indeed a time for collaboration to work collectively to build a stronger and more resilient industry.

with TEPA (Tyre Equipment Parts Association) and ARA (Automotive Remanufacturers Association). No one could have known at that stage that within a few months everyone would be working remotely.

Covid-19 forced MIWA to change the way we communicate with our members and virtual meetings are now widely accepted and effective, as is communicating and learning through webinars and podcasts. Our Telegram information channel has also proved very effective, as it is quick and efficient and the message gets to the right person immediately. To further enhance our communication, we have introduced a **MIWA newsflash**, which is utilised to communicate important and essential information to members.

Covid-19 has also changed the way MIWA members communicate with their customers and has been able to partner with **Connected Life** to offer all MIWA members a complete digital marketing package.

MIWA website

The MIWA website has been re-developed and now includes a member-to-member communication portal. The **MIWA TECH portal** now houses all relevant MIWA information, such as our new updated CI Manual.

Keeping options competitive for members

Two years ago, Autobooks partnered with MIWA to offer members **workshop software data packages from HaynesPro**. These have been an invaluable support and provide workshops with the most affordable and reliable WorkshopData, which conforms to manufacture standards.

HaynesPro has further offered members convenient options, including a **7-Day HaynesPro License Free**, and payment options ranging from monthly payments to once-off or split payments.

Retention communication by MIWA Associational Representatives

Although personal contact with our MIWA members was hampered with the impact of Covid-19, our MIWA Associational Representatives continued to make contact with our members with assistance and support, especially during the high time of Covid-19 when the correct information on the different regulations was crucial. This was done telephonically, by e-mail, WhatsApp groups and utilising the MIWA Information Group on Telegram. All these interactions were captured and recorded on the MIWA CRM platform hosted on Portatour.

Project Compliance

Project Compliance is a project the RMI launched in 2019 to address unscrupulous operators conducting business from unauthorised premises as well as semi-formal workshops that do not comply with industry standards, legal requirements and regulations. **The main objective is to set a level playing field, where all businesses comply with the same rules and regulations, as required by existing laws, to ensure fair competition and equal trading conditions.**

During the year, MIWA supported the programme with various actions. These included a Bloemfontein focus area, which did not yield much result, and two media articles on relevant topics.

We have now decided to focus on the consumer, as they ultimately make the decision on where to service or repair their vehicle. Actions include social media content posted on the MIWA Facebook page and shared with MIWA members keen to support this initiative.

The quest of finding ways of minimising risk and protecting the livelihoods and investments of our members continues.

Lifting Equipment

The issue of compliance to lifting regulations has been addressed by MIWA in conjunction with our collaboration partners and input was provided to the SABS Technical Committee 1035.

A formal working group was nominated and continues to meet on a regular basis to address the impact of the current regulation.

The main thrust of the revision of SANS 71 is to remove the reference to **'load testing'** and to replace it with **'performance testing using a representative vehicle'**. Other changes to SANS 71 have been considered in the light of reducing the cost of compliance and finding a method to increase businesses' levels of safety compliance.

Grading

MIWA has been working hard to ensure all its members are professionally graded and accredited. A key aspect of this is aligning the business with top-class service providers that utilise the latest technology and platforms for optimum results. By doing this, we achieved our main objectives of establishing a credible grading project and ensuring each

audit is conducted consistently and according to set criteria. MIWA has accordingly teamed up with **WIPCORP** as the official service provider responsible for independent unannounced audits at all MIWA member businesses to ensure legal and industry compliance.

During the grading process, a workshop undergoes a thorough assessment. Aspects that are scrutinised include health and safety operating procedures, the premises, equipment, administration, specific staff qualifications, waste removal, and staffing, among others.

The auditing team consists of service partners across the country that have been trained in the technical aspects as well as systems auditing.

Each service partner has **operational experience and the latest technological tools to drive unbiased and value-adding services**. This ensures that the results of the audits are available much quicker and grading certificates issued timeously.

Having MIWA representatives in the Regions also allows for personal feedback to MIWA members as well as guidance on where to improve on the overall results.

MIWA brand awareness

MIWA launched its new corporate identity at the end of 2019. While the logo has retained its strong heritage, it has been modernised and simplified. **The modern icon represents our commitment to supporting change in the industry and our readiness to implement modern technologies.**

To promote MIWA, the public relations team continuously interacts with the media, offering advice to motorists and sharing good news stories from the industry. The results have been very positive with MIWA featuring in the print, online and broadcast space regularly.

During the period July 2019 to June 2020, 49 press releases were distributed, with an average PR value per month of over R1,1 million, with an average potential readership of 1.7 million people per month across a spread of online print and broadcast media.

Spanner in the works

We had a good year in terms of newsletter content and now distribute our newsletter via our website and through *Telegram* for added convenience for members.

Training

The Covid-19 pandemic has accelerated the need for innovative development in e-learning. MIWA is therefore an **active participant in the RMI's National Executive Training Committee's initiative to develop a framework for digital re-modelling of lifelong learning and work**, which took place in April 2020.

Electude and MIWA are working together to find a solution for **blended learning approaches**, particularly for the motor mechanic and diesel mechanic trades.

R2R

The Competition Commission has advised all stakeholders in the automotive industry that the implementation of a single industry-wide Code of Conduct (Code) is not feasible. Instead,

the Commission converted the proposed Code into a Guideline to be used by the Competition authorities in applying the Competition Act in the automotive aftermarkets sector, for purposes of enforcing the Competition Act and prosecuting any breach of the Act.

Consultations with various stakeholders continued throughout the year under review. The impact of Covid-19 has, however, had an effect on the timeframe and has delayed finalisation of the guidelines.

MIWA and Right to Repair South Africa (R2RSA) eagerly await the promulgation of the document, which is expected to be released by the end of 2020, but continue lobbying in the meantime.



**National
Automobile
Dealers'
Association**

The year under review started with so much promise, yet no one could have predicted the advent of the Covid-19 pandemic, the resultant national lockdown and the concomitant negative impact these events would have on business and employment. The dire situation was further exacerbated by the country's downgrade to junk status by the financial rating agencies.

During the darkest hours of the initial lockdown, the leadership of the National Automobile Dealers' Association faced what appeared to be insurmountable challenges

head-on and in close collaboration with the National Association of Automobile Manufacturers of South Africa (NAAMSA), the National Association of Automotive Component and Allied Manufacturers (NAACAM) and the rest of the sectors within the RMI, representations were made, day and night, to the key stakeholders within Government to get the automotive industry back to work.

Due credit and appreciation must be given to the leadership of these organisations for their steadfast dedication and resilience during this critical period and for being able to demonstrate to Government the dire economic consequence should the automotive industry not be permitted to trade sooner than later. Thankfully, the automotive industry was given permission to open its doors once the initial hard lockdown under Alert Level 5 had been eased to Alert Level 4, which was a good two months earlier than Government's original timeline for our sector of the economy.

In the months ahead, NADA will continue to work extremely hard to enhance and build on the good relationships that have been fostered with key industry stakeholders in business, labour and various governmental departments over the past six months.

Membership

NADA experienced another year where there were numerous consolidations and closures of dealerships that negatively impacted on NADA's membership numbers. Unfortunately given the current economic climate as a result of the Covid-19 pandemic and the national lockdown, this trend is likely

to continue into the new financial year. NADA will now have to focus on pre-owned and commercial dealerships to claw back some of the decline in membership.

NADA PR Strategy

Due to the success achieved during the previous financial year, the NADA Management Committee took a decision to re-appoint its PR agency, effective 1 July 2019, to continue promoting the profile of NADA and, more importantly, educating consumers of the benefits of doing business with franchise motor vehicle and motorcycle dealers.

In addition, NADA continued to counter the negative press and disinformation regarding right to repair and was highly successful in changing the narrative in the media.

NADA commenting on the monthly new motor vehicle sales figures from a dealer perspective has been receiving significant traction in the press and the media have amended their deadlines to accommodate the release of NADA's comments. During the year, media coverage with an advertising value of more than R13-m was generated.

Proposed Guidelines for Competition in the Automotive Industry

The Competition Commission concluded that, due to the substantial divergent views of the various stakeholders and the lack of buy-in, it was not feasible to implement the proposed Code of Conduct for the Automotive Industry.

The Commission instead decided to convert the Code into Guidelines that the Commission would enforce

in terms of the Competitions Act and prosecute any breach of the Act.

The draft *Automotive Aftermarket Guidelines* were published by the Competition Commission for public comment on 6 February 2020. The NADA Legal and Compliance Committee reviewed the content of the proposed Guidelines and also consulted with its attorneys to discuss how best to respond. On 16 March 2020, NADA made a comprehensive submission to the Commission dealing with the salient issues impacting the franchise dealer network.

Subsequent to the submission, the Commission extended the period for comment to 30 June 2020.

Postea: The Commission will be engaging with relevant stakeholders in September 2020 to discuss and obtain clarity with regard to their submissions and the NADA engagement is scheduled for 28 September 2020.

Meetings with Financial Intelligence Centre (FIC)

During the year under review, the NADA Legal and Compliance Task Team continued to engage with the FIC on the roadmap to changing dealers into Accountable Institutions from their current reporting institution.

On 19 June 2020, National Treasury published, for comment within 60 days, the proposed amendments. The proposed amendments would, in effect, remove the category of 'Reporting Institutions' (and therefore motor vehicle dealers would no longer be classified as 'Reporting Institutions') and introduce a new category of 'dealing in high value goods' (i.e. a person who carries

on the business of dealing in high value goods in respect of any transaction where such a business receives a payment or payments in any form of R100 000,00 or more, whether the transaction is executed in a single operation or in several operations that appear to be linked).

As a result of the proposed changes, motor vehicle dealerships would be classified as 'Accountable Institutions' given that the majority of the vehicles sold within their businesses exceed the R100 000.00 transaction threshold.

Postea: NADA made submissions on 18 August 2020 to National Treasury regarding the impact that the proposed changes would have on motor vehicle dealers.

Meeting with Financial Sector Conduct Authority (FSCA)

The NADA Legal and Compliance Task Team continue to engage with the senior management of the Financial Sector Conduct Authority (FSCA) to better understand the FSCA approach to Market Conduct in the Automotive Retail space and to bring NADA closer to the FSCA.

The FSCA's focus over the past 12 months has been on Credit Rates (the rate for risk or the rate for profit), Cell Captives, Dealer Value-Added Products (VAPS), Service Plans, and VAPS sold as non-insurance.

Overall, NADA's engagements with the FSCA have been very positive and further discussions are planned during the new financial year.

During the year, NADA also commissioned an in-depth analysis

of the relative contribution to dealer margins of 1st, 2nd and 3rd gross, as well as the relative contributions from New Car Sales, Used Car Sales, Workshop, and Parts Sales. The Report was finalised towards the end of January 2020 and will be released later in the year following clearance from NADA's attorneys that the data was sufficiently aggregated and would not contravene competition law guidelines.

2019 Wage Negotiations

NADA would like to thank both **Greig Pringle** and **Richard Manthey**, who were involved as part of the RMI Negotiation Team, for their dedication in trying to reach an amicable settlement with the trade unions.

Although a settlement agreement was reached between the parties, it has still not been signed off and published by the Minister of Labour and Employment.

2020 NADA Dealer Satisfaction Index (DSI) Survey

During the latter part of 2019, the NADA DSI Survey research project was put out to tender and four research companies responded on time with comprehensive proposals. After due consideration, the NADA DSI Task Team agreed to re-appoint Lightstone as its research agency.

The NADA DSI Survey went into the field around 15 March 2020 and was progressing extremely well. However, a week after the country went into lockdown, it was decided to suspend the research for the initial 3-week period.

It became evident thereafter that there would not be consistency in the results, as the mindset of

participants completing the survey post the lockdown would be tainted and the overall results of the survey would undoubtedly have been influenced negatively by the suppressed market and trading conditions. The research was therefore cancelled for 2020.

The NADA DSI research is carried out annually to monitor the health of the relationship between dealers and their respective manufacturers or importers and 2020 would have been the 25th consecutive year of the research.

As NADA, we look forward to re-activating the NADA Dealer Satisfaction Survey research and seeing the industry at the NADA DSI Awards function in 2021.

NADA Dealer Performance Programme (DPP)

Following on the success of the previous year, the NADA Dealer Performance Programme continued to deliver excellent content to the dealer network, with various activities, as outlined below.

NADA DPP Roadshows, **Make your 2020 Business Plan Work for You**, were presented in October 2019. Greg Mason, a leading professional business planning consultant, dealt with the best strategy, approach, ideas and advice to deliver a actionable and measurable business plan.

As a result of the Covid-19 pandemic and the national lockdown, the NADA DPP Conference scheduled for the latter half of March 2020 was unfortunately cancelled. However, various highly informative and successful webinars were presented instead, with which

NADA managed to reach out and communicate effectively with more than 1 300 dealers.

The webinars included, **Get on Point**, in April 2020, featuring a panel of dealership experts that addressed critical business issues on the way forward for the SA Auto Retail Industry in a Q&A discussion, with an attendance of 620 delegates.

In May, NADA presented an Industry Update Q&A featuring a panel of industry leaders to update industry on the latest market and customer trends. NADA also utilised this webinar to brief the 1 030 attendees on its continued lobbying for the automobile sales, service and retail industry to be included under the Alert Level 4 sector framework and discussed the latest economic scenario and the potential future outcomes.

In early June, NADA presented a webinar titled, **Let's Measure May 2020**, with 428 attendees. A panel of industry leaders reviewed how dealerships had performed under Alert Level 4.

NADA / MSXI Business of the Year Awards – Virtual Presentation

NADA and MSXI were unable to host the gala dinner for the Business of the Year Awards. After much deliberation and planning, NADA and MSXI honoured franchise dealer businesses in various categories for financial performance by way of a virtual live online awards function, which was well received by the participating dealership finalists.

Our thanks to **Alan Golden** and **René Booyen** at Quartermaster for organising

and running the event on behalf of NADA and MSXI.

The NADA Life Time Achievement Awards were placed on hold for 2020 and will be reactivated in 2021.

Conclusion

Many dedicated motor vehicle dealers and executives give up their valuable time to serve on the NADA structures, thereby ensuring that the key critical issues impacting the retail motor vehicle and motorcycle dealership business environment are proactively addressed for the collective benefit of all motor vehicle and motorcycle dealer members.

NADA would like to take this opportunity to sincerely thank all these individuals for their ongoing service to NADA and the industry in general – your contributions are much appreciated.

There are many other matters and issues being dealt with by NADA on an ongoing and ad hoc basis. Through the collective efforts of the elected office bearers and the full-time paid officials, dealers' best interests are being attended to.

Through its ongoing endeavours and achievements, NADA will continue to pursue its vision of contributing to the long-term sustainability and growth of retail motor vehicle dealer businesses.



**Vehicle
Testing
Association**

The 2019/2020 year was the first full year for the VTA under the directorship of Julian Pillay. The year began well with continued and constant interaction and planning by the NEC. Many issues were addressed and a vision to take the Association to new heights and to provide solid added value for the members was developed, and this process continues.

The year also saw the ushering in of a new VTA logo. The logo has been simplified and modernised, while still retaining its unique essence and rich heritage. **The circular shape of the new logo refers to the motoring industry – from wheels to cogs to street signs. The tick is a widely used symbol and aptly symbolises certification and endorsement.** The design has been simplified while retaining the heritage of the known and trusted symbol of the tick mark.

The latter part of the financial year was rocked with the turmoil of the Covid-19 pandemic, which saw all member businesses having to close down during the months of April to June 2020, due to the lockdown. The Covid-19 lockdown had far-reaching effects across the industry and not one of our members was not negatively impacted by the process.

Unfortunately, the vehicle testing industry was hit much harder than most others, firstly by the fact that while the Minister of Transport announced early in May 2020

that they would be allowed to reopen, this was delayed for an extended period, as the respective provincial departments of transport deliberated on the directives that would need to be in place before a test station was allowed to reopen. Eventually, the majority of provinces allowed the reopening of test stations on 1 June 2020, while others were only allowed to reopen around 14 June 2020. The second difficulty experienced by many of our members was that several of the provinces' Departments of Transport limited the daily number of vehicles that would be allowed to be tested.

Test stations suffered severe financial hardships because of the initial lockdown and this limitation exacerbated the situation, as the income derived from the limited vehicles (which includes free re-tests) does not even cover the operating costs of a test station.

The VTA penned a barrage of correspondence to the Minister of Transport and high-ranking officials on both the National and Provincial Department of Transport to lobby with all relevant parties to convince them to lift these limitations that are crippling our industry. At year-end, this was still ongoing.

Already before the pandemic, test stations were in survival mode because of the poor economic environment. The current situation has had a devastating effect on the industry's survival, let alone its growth. To make matters worse, Eskom implemented another spate of loadshedding.

On a positive note, our members showed their adaptability and

adjusted to new Regulations, often at short notice. **Their willingness to adapt highlights their passion for the industry.**

The interpretation, communication and advice regarding the regulations from the team in the larger RMI undoubtedly helped to guide our members through such challenging circumstances.

Key stakeholders' meeting in Gauteng

The VTA in Gauteng, chaired by Johannes Tshabalala, and Vice-Chair, Hennie Vermaak, convened a meeting with key stakeholders in July 2019 to discuss, among other issues, the RMI-VTA Anti-Corruption and Anti-Fraud Charter and Undertaking, concerns regarding Microdotting, the non-compliance of test stations in other provinces, and training of Vehicle Examiners on new technology vehicles.

The meeting was well supported by the authorities and included attendance by the Gauteng Department of Transport (DoT), National DoT, SABS Inspectorate, the RTMC Anti-Fraud Unit, the South African Bureau of Standards (SABS) and the Road Traffic Management Corporation (RTMC).

The meeting was a success and will go a long way in forging relationships with key stakeholders that will benefit the industry as a whole. It is our hope that this gives rise to further meetings of this nature with the stakeholders and possibly similar such meetings with similar role players in the rest of the provinces.

A file of evidence was submitted to the RTMC for further investigation into corruption in the province.

Southern Africa Development Community Cooperation in Standardisation (SADCSTAN) technical meetings

These meetings were held in August 2019 and were attended by the VTA National Chairperson, Ferose Oaten. During the most recent meetings in Mauritius, 23 countries adopted the phasing in of minimum testing standards, as well as the automation of all testing equipment from the year 2021. If adopted, these standards will take precedence over the national standards of any country.

NEC

Ferose Oaten (Chair), Johannes Tshabalala, Hennie Vermaak (Vice Chair) and Naeem Sheik were elected to the serve on the NEC for a 2-year term until 2021.

The VTA NEC held regular meetings and telephone conferences during the year. Since the outbreak of the pandemic, the frequency of these meetings have increased substantially, albeit on electronic platforms, to discuss ways and action plans to assist our members.

The VTA NEC is continually lobbying for the rights of our members to ensure a level playing field to conduct business and met 9 times during the year. Each of the Regions held an AGM during the year.

Great appreciation is extended to the above committee members who continue to sacrifice their time and effort to ensure the association continues to remain stable, sustainable, and an ongoing value to members during these peculiar and trying times.

AGMs

AGMs were held nationally as follows:

- VTA AGM Gauteng
- 12 September 2019
- VTA AGM Western Province
- 18 September 2019
- VTA AGM KZN
- 10 September 2019
- VTA NEC AGM
- 8 October 2019

Projects

The VTA was invited by the Key Group, based in KwaZulu-Natal, to deliver a presentation on periodic testing at their AGM in August 2020.

During Alert Levels 5 and 4, the VTA developed a business continuity and risk adjustment plan for test stations, in accordance with Disaster Management Act directives and regulations. The policy and guidelines were tailored for test stations to enable them to meet all the safety regulations required to help prepare them for when they were allowed to reopen. The document was provided to all VTA members in early May 2020.

Representation of the industry on SABS Technical Committee 1033 (TC 1033)

The industry is governed by the National Road Traffic Act and its provisions. The main standards are SANS 10047 and SANS 10216, which are both part of the work and activities of Technical Committee 1033.

The annual meeting of this Technical Committee was held at the SABS on 21 November 2019

and the RMI-VTA was represented by Ferose Oaten, Naeem Sheik, Hennie Vermaak, and Julian Pillay.

VTA meetings

The VTA held various meetings in different provinces during the period under review, including a VTA KwaZulu-Natal meeting with the KwaZulu-Natal Department of Transport, two VTS Proprietors meetings with the KwaZulu-Natal Department of Transport, and two VTA Western Cape members' meetings.

Free Safety Test Campaign

Participating RMI/VTA vehicle testing stations around the country participated in a campaign in the first half of December 2019. The campaign offered motorists free safety-critical checks on their vehicles. Unfortunately, due to the outbreak of Covid-19, the annual Easter safety campaign for 2020 had to be cancelled.

Conclusion

The Association will, through its ongoing endeavours and achievements, continue to pursue its vision of contributing to the long-term sustainability and growth of test stations. The VTA remains committed to enhancing the test station industry and, more importantly, stamping out the corruption that has plagued the sector in recent times.

South African Vehicle And Bodybuilders' Association



The South African Vehicle And Bodybuilders Association

(SAVABA) has approximately 116 active members nationally and is also registered and regulated by the National Regulator for Compulsory Specifications (NRCS).

Our members build commercial vehicle body applications, such as tankers, trailers, refrigerated bodies, and rigid bodies. They also build bus bodies and specialised vehicle body applications, such as tow-trucks, ambulances, and off-road vehicles. Some of our members are also component suppliers to bodybuilders.

SAVABA members work very closely with the original equipment manufacturers (OEMs) under the National Association of Automobile Manufacturers of South Africa (NAAMSA), which manufactures medium and heavy commercial vehicles.

The 2019/2020 year was the first full year for SAVABA under the directorship of Julian Pillay. The year began well with continued and constant interaction with dtic and NRCS. It also saw the election of a new National Executive Council (NEC) with the most noteworthy change being that a new national Chairperson was elected for SAVABA. Mams Rehman stepped down after many years as National Chair and Eduan Naudé was



elected his successor, with Jaco Bezuidenhout elected National Vice Chair.

The year also saw the ushering in of a new SAVABA logo. The new SAVABA logo features body panels that are shaped into cylinders that make up an 'S' in a very stable, geometric style. This makes for a strong, balanced symbol and also speaks of the discipline and precision that goes into our members' craft.

As with most industries, the Covid-19 pandemic also had far-reaching effects across the industry and all our members were impacted. Some of our members, however, did manage to operate during Alert Level 5, providing support to essential services. However, the drastic drop in production still had a negative impact on their businesses.

Once allowed to re-open, our members still faced several challenges, the most notable were the issues surrounding the licensing and certification of their products, a problem that still continues. Our members were, however, tenacious and adaptable and with the expert help and guidance of the larger RMI, managed to weather the storm.

The interpretation and communication of the regulations on an ongoing basis and constant advice from the excellent team in the larger RMI undoubtedly helped our members immensely through that tough period and was imperative as they continue to get back on their feet.

Meetings and interaction between the National Regulator for Compulsory Specifications (NRCS) and SAVABA

The stakeholder meetings with the National Regulator for Compulsory Specifications (NRCS) that started in early 2019 were a success, with both parties recognising the need to work together. Three further meetings were held during the 2019/2020 financial year, with the agreement to hold quarterly meetings every year.

These interactions continue to prove fruitful and invaluable in addressing the concerns and issues our members experience with the regulator and vice versa.

SAVABA was also invited to participate in Specialised Technical Committees in the NRCS. Nominations of two representatives from SAVABA were submitted to the NRCS.

The committees have yet to be established.

Interaction with the Department of Trade Industry and Competition (dtic)

In July 2019, SAVABA attended a meeting with dtic to discuss an overview of SAVABA's outlook and programmes. Dtic would like to institute a program whereby dump trucks are built in South Africa, as they are mostly imported, and expressed an interest in working with SAVABA in this regard as well as on other projects going forward.

Representatives from dtic attended the SAVABA regional AGMs in Gauteng and KwaZulu-Natal to address members on this topic. Discussions in this regard are still ongoing as the project has been

delayed and hampered by the Covid-19 pandemic.

SAVABA also met with dtic in February 2020 to discuss concerns regarding imported car carriers.

AGMs

During the year, Port Elizabeth and Border held a combined AGM on 4 September 2019, Highveld, Pretoria and Bloemfontein held a combined AGM on 12 September 2019, the Western Cape and KwaZulu-Natal each held an AGM (on 19 September and 2 October 2019, respectively) and the National Executive Council held an AGM on 8 October 2019.

NEC

The following members were elected to the serve on the NEC for 2019 to 2021: Mams Rehaman, Eduan Naude (Chair), Bruce Morgan, Jaco Bezuidenhout (Vice Chair), Sarel Dippenaar and Danie Fourie.

The NEC met on 5 occasions during the period in review.

SAVABA has great appreciation for the time and effort our committee members offer to ensure the Association continues to remain stable, sustainable, and adds ongoing value to members during these particularly trying times.

Conclusion

SAVABA is the leading Association in the industry and a body recognised by dtic and the NRCS.

SAVABA carries the mandate of its members in many arenas. Its main focus is to protect members and influence legislation in the best interest of the industry. The Association is well respected

as the voice of the vehicle and bodybuilding industry and continually strives to protect the interest of manufacturers, importers, and builders (MIBs).

The Association has voting rights at many relevant forums, including dtic, NRCS, SABS, and DoT (National and Provincial). In the intensely competitive modern business environment, motor industry entrepreneurs require professional, efficient support and infrastructure that meets, and even anticipates, their needs. SAVABA can fill that role through a variety of products and services.

The Association is looking forward to continuing to do all it can to assist members and add value to their businesses, especially in these uncertain times.

South African Motor Body Repairers' Association



"Take SAMBRA back to the members in the trenches." That

was the directive from the new NEC of the South African Motor Body Repairers' Association (SAMBRA) upon developing the new Vision and Mission for the Association. This new way of thinking was certainly put to the test when we all experienced a world-first...

Nations were in lockdown, people were dying, economies were under immense strain, unemployment rose to a new high and the motor body repair industry in South Africa came to a grinding halt, all as a consequence of Covid-19.

Our efforts during the initial national lockdown reaped positive results for SAMBRA members. Dialogue with insurers and appeals to government assisted many members in maintaining basic business principles and having the ability to return to work while observing strict protocols under Alert Level 4.

Since March, we have seen the landscape change and have adapted accordingly to assist members with the 'new normal'.

2019 saw a revitalisation of the Association

In the first half of the financial year, the SAMBRA logo was introduced. It features clasped hands as an indicator of SAMBRA's focus on its members' needs and our mission of protecting our members vigorously from any form of unfair business practice.

Right of lien

Earlier in 2019, the **Pay before Release mechanism** (right of lien) was reintroduced when the SAMBRA NEC established that the intermediary space within the short-term insurance sector could no longer manage their administration effectively. The situation was to the detriment of our members, who were being paid outside of agreed terms, often receiving payment months later.

SAIA

In an attempt to both look after the interests of our members, while still maintaining civil relations with our insurer business partners, SAMBRA met with the South African Insurance Association (SAIA) and the majority of the major underwriters to discuss the problem of maladministration by intermediaries and to explore

potential solutions. During that meeting, SAMBRA suggested an industry standard authorisation document. The SAIA undertook to develop and manage the introduction of such a document. However, no progress has since been made.

The underwriters held that the terms agreed in the service level agreement (SLA) with SAMBRA members were to be honoured by their appointed intermediaries yet, in practice, this has not been the case. SAMBRA's current position is that unless there is an existing SLA with our member, payment will be required prior to release of the vehicle.

In the meantime, and to assist members on an ongoing basis, SAMBRA has found that the most effective mechanism is to have a structured escalation process in place. We are therefore identifying the responsible manager at each of our members' business partners and putting these escalation processes in place.

Opening up the industry

One of the five important pillars of our mission at SAMBRA is to open up the industry for all members.

While SAMBRA respects the right of OEMs and Insurers to set stringent standards, we believe that if a SAMBRA member is prepared to invest in and meets those standards, they should be allowed access to an Insurer panel or manufacturer approval listing.

This principle has been favourably received among the major OEMs, yet Insurers continue with their restricted number approach, citing available work as the primary restrictor. SAMBRA's position is that each member is entitled to

access via the panels, and the Insurer should not be responsible or able to control how much of the available work each member receives.

Vehicle Damage Quantification Governance Body of SA (VDQ)

SAMBRA NEC members and employees remain active at board and executive levels at the Vehicle Damage Quantification Governance Body of SA (VDQ). However, after three years of contributing to the financial viability of the VDQ, SAMBRA members have become disillusioned at the pace of the finalisation of qualifications. This frustration is resulting in the non-payment of member fees, which is placing a cashflow burden on the VDQ. While SAMBRA still supports a professional designation for the assessing community, support from Insurers appears to be lacking.

Green practices

Green practices are an important focus for SAMBRA and the Association has engaged the University of Stellenbosch to assist. SAMBRA will be sponsoring the thesis of a Masters' degree student, which, after its completion and publication, will better enable SAMBRA to engage with suppliers and business partners in our sector.

SAMBRA's aim is to become a thought leader on the challenges and potential solutions to environmental issues created by the use and disposal of noxious products within our member businesses. Part of the outcomes sought are cost effective disposal or recycling devices on site.

Supporting our Members during the Covid-19 pandemic

The pandemic required quick action. SAMBRA therefore speedily developed and distributed sanitisation protocols to all members, we also purchased sanitisation packs and distributed them to members. Aided by the RMI's Covid-19 communications initiatives, members were kept informed of all available financial aids to their business and employees.

In addition, SAMBRA lobbied at regulator level for our sector to be included in the businesses allowed to operate under Alert Level 4. This lobbying was successful and enabled our sector to reopen, albeit in a very restricted manner. We are grateful very few of our members were completely closed for longer than four to six weeks.

Besides lobbying at regulator level, SAMBRA constantly engaged at Insurer level to enable the authorisation of repairs to vehicles already in-shop and for those post-lockdown accidents that were authorised for repairs. One of the greatest challenges during this time was to convince the Insurers of our interpretation of the ever-changing regulatory landscape.

Lower traffic volumes continue

At year-end, comparative data indicated that many of our members were returning to pre-Covid turnovers, it is evident that major metro areas continue to be under the most pressure and outlying more rural regions are best placed.

Total traffic movement charts indicated a sharp increase in traffic volumes at the introduction of Alert Level 3, however, these numbers have stabilised at far lower numbers than pre-Covid. This will directly affect our sector and it is likely that lower traffic patterns will continue for the remainder of this year.

Financials

SAMBRA's financials were carefully managed during the year under review. At end June 2020, the Association had managed to carry over a substantial additional provision into the 2020/21 financial year. This money will be used wisely and will only be channelled towards the execution of strategies, the acquisition of professional opinions that will guide our actions, important market data as well as in the development of products that the SAMBRA NEC believes will add real value to members.

Our healthy financial position allowed us to make the decision to not increase SAMBRA membership fees for the ensuing 2020/21 financial year without sacrificing on service provision to members.

Toward the end of the first quarter 2021 and once business is back to a post-Covid-19 'normal', SAMBRA will finalise a number of initiatives that were placed on hold as a result of the pandemic and in order to review and curtail expenditure.

The immediate future is not without its challenges in the motor body repair sector, but we believe that for those businesses that remain focused on delivering excellent, cost-effective services, a bright future awaits – and SAMBRA will be ready to support them.

South African Petroleum Retailers' Association



"We keep moving forward, opening new doors, doing new things, because we're

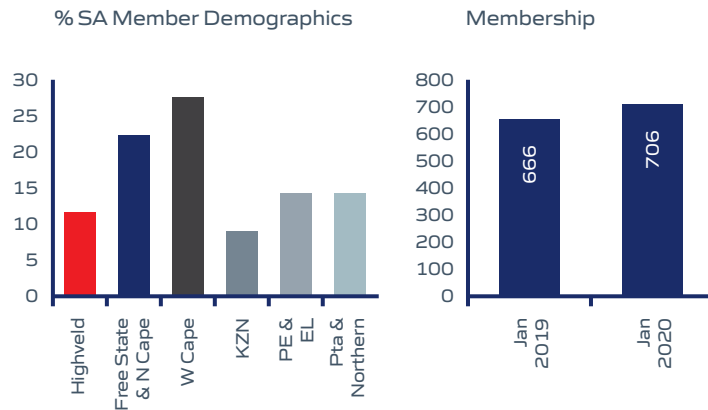
curious and curiosity keeps leading us down new paths." - Walt Disney.

The South African Petroleum Retailers Association (SAPRA) represents the interests of all petroleum retailers in South Africa, with the aim to improve growth and profitability of the retailer in a sustainable manner.

The tasks we take on are driven in a bottom-up approach, where retailers raise specific challenges for our National or Regional offices to find solutions for. These are normally external forces often beyond individual retailer's control, which is where the collective voice becomes relevant.

Feedback and engagement with members is what drives our strategic direction. SAPRA is currently involved in various collaborative interventions. We are also continually facing new challenges: there are ever-changing dynamics, compliance and policing are compromised, rules and regulations manipulated, staff and labour-related challenges on the rise, ongoing Regulatory Accounting System (RAS) model queries, illegal retailing, licensing issues, and industry transformation.

Membership 2019/20



We embarked on the year 2020 by proudly introducing our new corporate identity. The new SAPRA logo is a striking new symbol that represents a simple drop of fuel that doubles up as an indicator needle on a fuel gauge.

Reflecting on the year, July 2019 - June 2020

The National Executive Committee (NEC) and Regional Executive Committees (ECs) are made up of Petroleum Retailers that offer their services free of charge to the Association, in an effort to find strategic solutions to improve

retailing. The member network is multi-branded which is useful when dealing with matters that affect all retailers and not just within a specific brand silo. The NEC/REC met either physically or through teleconferences 12 times.

Membership

Member meetings are held periodically in seven key regions to ensure that the voice of the petroleum retailer is heard. Technology aided effective and relevant communication with members.

Industry Statistics

service stations

2,760

Company Owned (Leased)
Retailer Operated (CORO)

1,840

Retailer Owned Retailer
Operated (RORO)

2,400

Other resellers (Co-ops, General
Dealers, Old Club sites etc.)

±7,000

Retail Sites

Oil companies continue to develop new sites and divest from uneconomical sites.

Diesel:

30%

retail

70%

other trade

Petrol:

97%

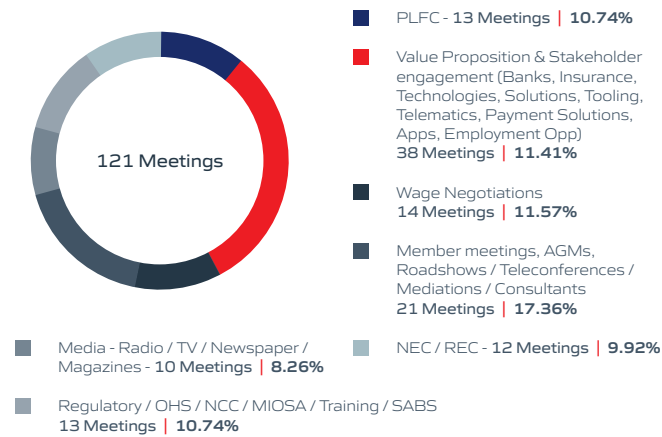
retail

3%

other trade

6 majors refining wholesalers

Activity Streamline 2019/20



Managing market forces

The industry is riddled with many challenges that affect the long-term sustainability of retailers. SAPRA continuously tracks trends and, where necessary, facilitates platforms to effect change. The one constant that will give one business a leading edge over another will be service delivery and redefining the customer experience. Many retailers have already grasped this concept and have taken the customer experience to heightened levels.

Covid-19

Retail sites were mandated to stay open by government throughout the national lockdown. This was, however, the start of 'business unusual'. Year-on-year figures in April 2020, we observed a drop of up to 70% in fuel sales, with a concurrent drop in C Store revenue of 50%.

Although operating expenditure was cut as far as possible (on average by 36%), the losses were unavoidable as service stations are geared to run at much higher volumes. Other businesses, like car

washes, had to shut down with a 100% loss in income.

SAPRA offices kept the industry abreast through a regular Covid-19 monitor communication. A SAPRA Business Continuity Plan and Risk adjusted Strategy helped retailers navigate the unprecedented times. A direct in-road with the Department of Mineral Resources and Energy (DMRE) helped us interpret some of the ambiguous regulations.

SAPRA successfully lobbied for the tax threshold benefit to be lifted from R50m to R100m. As a united South Africa, we saw the coming together of stakeholders, Ubuntu style, to unite and offer assistance. Relief measures, although sometimes challenging to access, brought about a level of comfort for stressed business owners. Was this the wakeup call needed for every single business owner to introspect, to re-imagine their business model and re-purpose operations?

Challenges during Covid-19

Unprecedented times brought with it challenges that forced business owners to re-imagine business operations to remain relevant.

Some challenges faced from Alert Level 5, included:

- Product basket restriction on essential items in convenience stores.
- Consumers refusing to follow protocols.
- Staff operations became needs-based and, in some cases, staff were laid off.
- Operating hour restrictions and curfews.
- Bakeries and car washes had to shut down.
- The interpretation of regulations – conflicting media statements vs the regulations.
- Inconsistent policing and strong arm tactics to prosecute for non-compliance.
- Balancing income against saving became a stark reality.

Margins

Petrol is a regulated product, while diesel is not. Petrol pump prices are fixed by legislation and adjusted monthly. Retailer margins are also fixed. The mechanism used to administer this is called the Regulating Accounting System (RAS) which was introduced in 2013 and based on a benchmark service station.

RAS is designed to reimburse operational costs and provide a return on investment for CAPEX expenditure to the parties involved in retailing. The RAS model is very complex in application and does require expert opinion to ensure investor return is relevant, especially on contract renewal. RAS is administered and interpreted differently by oil companies,

SAPRA Priorities

1. University Study:
 - Clarity on definitions (Phase 1)
2. Dealer Council
Collaboration and integrated industry platform – platform for industry issues.
3. Petroleum Liquid Fuels Charter Council (PLFCC) – Retailer readiness.
4. Evolution and retailer awareness – Track – Global Trends
5. Competition/Retailer sustainability models
 - Alternative Fuels
6. Whistle Blower hotline & Industry non-compliance.
7. Loyalty program disruption and legitimacy against the dictates of the PPA.
8. Moratorium on new site development.
9. MIBCO Challenges

creating inconsistency among competing retailers. SAPRA is embarking on a university study to establish the relevance of RAS in the current economic climate benchmarked against actual retailer data. This study will in all likelihood inform change to the existing model. The project is in design and scoping phase and will develop further in the coming year.

Loyalty Programmes

The advent of loyalty programmes

in fuel retailing is a game-changing disruptor for consumer spend patterns. The last 12 months has seen a significant rise in the number of programmes and, in some cases, the introduction of in-house programmes.

The impact a new loyalty programme has on an existing fuel retailer is significant: evidence shows that up to 30% of margins may be affected, thereby skewing the perceived level playing field.

Individual retailers have little say on loyalty programme decisions. SAPRA, as a platform that allows for inter-brand collaboration, is continuously looking at ways to help retailers optimise their investments as these external emerging forces are mostly beyond retailer control.

SAPRA is in discussions with the department on the topic. The Petroleum Products Act is very specific on discounting of regulated product and one has to question whether or not loyalty programmes are breaching the envisaged spirit of the act.

Wages

The Minister of Minerals and Energy approved a retail margin adjustment for year 1 wage increases of 5.6cpl, which was included in the regulated pump price effective 1 January 2020.

MIBCO (the Motor Industry Bargaining Council) provided guidance on the application of the wage increase and minimum rates for Sector 5 (fuel dealers, service stations and related establishments) for the period ending 31 August 2020, effective from 1 January 2020.

Employers were encouraged to make the wage adjustment even though Sector 5 increases have not been gazetted by the Department of Employment and Labour, and can therefore not be regulated by MIBCO (until the MIBCO Main Collective Agreement is gazetted).

Compliance

It is not uncommon to have some industry players operate unethically and in contravention of the rules of retailing.

In the absence of regular compliance audits, these unethical practices are increasing, causing progressive loss of volume and sales to compliant retailers. In an effort to assist policing authorities to drive necessary compliance, SAPRA launched a Whistle Blower hotline for members to channel violations that appear to be spiralling out of control.

Transformation

SAPRA is committed to assisting industry achieve meaningful transformation that is fair and reasonable, practical, implementable and sustainable. The Association is committed to the National Development Plan. The proposed Codes have been prepared, and signed off by the PLFCC Council and line ministry of the Department of Energy. The Covid-19 pandemic caused some delays, however, the Draft PLFCC Codes have been sent to the Department of Trade and Industry (dtic) for approval and gazetting for the Section 9(5) (first gazetting). Once gazetted, the commentary period of 60 working days will be available for public and stakeholder comment.

During a recent meeting between the Special Task Team (STT) of the

PLFCC and the dtic BEE unit, dtic raised queries relating specifically to deviations contained within the Draft PLFCC Codes from dtic Generic codes, for which the Council must supply the necessary justifications based upon sound economic reason or empirical evidence. The deviations mostly relate to the uniqueness of the petroleum industry, which are not always catered for by dtic Codes of Good Practice.

Given the widespread sectoral stakeholder participation, this exercise does hold challenges, all of which the Council is dealing with on an ad hoc basis. The process will in all probability be finalised in the upcoming months to the satisfaction of dtic BEE unit. There is a good probability it could take place before the end of 2020.

Looking ahead

The year in reflection has no doubt been the epitome of change. Was Covid-19 the reality awakening for all business owners to realise that change is real, that disruption is real, and that the old way of work will never be the same again? No one could have imagined that the simple filling station of the 1970s would transform into what you see today. In the same way, it is hard for us to conceive what the fuel stations of the future will look like. What we do know, is that they will be strikingly different to what is on offer today.

Points to consider

- Consumer spend patterns are changing. Repurposing transport requirements or mobility may be a reality sooner than we envisage. A work-from-home model could impact fuel sales by up to 30% on normal volumes.

- Reconfiguring product offering based on consumer demand per area. Examples are freeway sites between work and home which are already offering a pharmacy, health-conscious takeout food, Takealot and Makro collection points. It will boil down to the 'customer experience'.
- Fundamental efficiencies in the 'new world of work versus the old world of work' are now being force-tested in real-time.
- Automation and self-service forecourts may become a reality.
- Be prepared to learn/unlearn and relearn. Staff must be versatile in multiple roles, depending on operational demand schedules.
- Driving longer customer stays at a fuel site will become a business imperative. Retailers need to consider what they offer their customers.
- Business introspection, lean management, staff rotation and optimisation will all now be necessary tools to consider.

The experiences during Covid-19, although somewhat forced, have re-ignited the need for a change culture. Retailers found innovative and creative ways to reimagine their business offering. Lean management and profit efficiency became a major focus. Many archaic 'nice-to-haves' have become considered wasteful expenditure.

There appears to be a tug of war between the fossil fuel thinkers and the Electric Vehicle (EV) thinkers. Global trends should be the indicator that informs the way

forward. As to the time that the transition is expected to happen in South Africa or Africa, there are mixed views. In the broader economy, the transition to EVs will deeply transform the transport value chain, which employs large numbers of people who, over time, will experience repurposing in their jobs and careers. For South Africa, global alignment on greening initiatives will become a Government priority.

We are already in a transition phase and every retail petrol station needs to ready itself for imminent change. The world is rapidly moving into a new world, and even in South Africa, more progress has been made than the average person suspects. The external technology forces which are shaping a new industry out of the old, is doing so in the same disruptive manner Uber did to the taxi industry and Airbnb did to hotels. As an industry, we have to ensure we do not go the same way as Kodak.

In hindsight, one can safely say that evolution is fast approaching in the petroleum retailing space. The entire model is likely to change to place the customer, rather than the car, firmly at the centre. The one guarantee that we have in life is that change will happen. My advice to all retailers is to become early change adopters, as early adopters are usually winners.

Automotive Remanufacturers' Association



ARA

During the year, the Automotive Remanufacturers' Association (ARA), together with the

RMI and the six other Constituent Associations, introduced a modern new and improved identity. This is a milestone that not only brings the industry closer together, but also gives it a bigger footprint and a stronger voice. We are very excited about the future prospects for ARA and its position in the industry.

As an amalgamated Association, we now have stronger bargaining power with industry and relevant stakeholders. ARA has grown into a unit and is stronger than ever before and moving with a focused pace toward positive sectorial influence and bringing about change and a better business atmosphere to its respective trade sub-sector. ARA represents the trade sub-sector, REMAN, i.e. Automotive Remanufacturing, Diesel Fuel Injection, Automotive Components and Turbochargers. Employment numbers within ARA are close to 3 000 employees.

The second half of the financial year was permeated by the National State of Disaster and subsequent Alert Level 4 national lockdown, yet the ARA office, and its Member businesses kept in close contact, ensuring a smooth, and focused approach to Government requirements.

In a continued effort to reduce the financial impact on its SMME Member businesses, the RMI has, and continues to, play a pivotal role in negotiations with industry stakeholders.

ARAs amalgamation and new logo

With the ARA officially launching a new and improved corporate identity and fresh, amalgamated Association in December 2019, the Association was set and geared-up to start a brand new decade.

The new ARA logo reflects the consolidation of three similar strong trade sub-sector Associations operating together in the remanufacturing trade sub-sector. The universally recognised engine icon was used as the central design, strategically placed in the centre, a powerful symbol of a healthy engine. It symbolises igniting a remanufactured engine and refers to new beginnings.

ARAs newly developed website and social media

The ARA National office is pleased to announce that that our new website is live. Please visit our website to benefit from the functionalities it provides. It will also serve as a tool for the motor industry and motoring public to locate automotive engineering workshops, diesel fuel injection pump-rooms, and automotive component workshops and can be found at <https://arasa.org.za>.

We further would like to encourage all ARA members to subscribe to our Telegram channel, directly linked to the ARA website. It is a communication medium to keep members fully abreast of the

latest developments within the Automotive Aftermarket Retail Sector and within the ARA camp, such as project developments, as well as RMI and industry news.

In addition, we have added an ARA YouTube Channel to the website, where the Automechanika – Johannesburg Conference video footage can be viewed.

In conjunction with Connected Life, ARA is now able to offer a tailor-made website option for all members, of the ARA family. Connected Life has agreed to forego the initial cost for building a website, and accompanying systems. To access this offer, please visit <https://clife.co.za/gethelp/>.

National Executive Committee (NEC)

The ARA national office would like to acknowledge the role of all its NEC members for their continued support and, especially for working tirelessly to overcome the challenges of the lockdown – and for continuing to do so. Individual and unique skill sets and leadership has taken the Association from strength to strength and sets ARA apart, showcasing to industry ARA's hard work, passion, business ethos, integrity and character, which bear testament to our continued successes.

Newly Developed Qualification: Engine Management & Fuel Injection Systems Mechanic

The long-awaited and carefully developed Engine Management and Fuel Injection Systems Qualification had been registered with the South African Qualifications Authority (SAQA). We are confident that this qualification will benefit the industry and

provide for positive change and the upskilling of industry tradesmen, whereas training providers and trade test centres will experience an influx of applications.

Industry stakeholders are set to meet to further discuss the development of material development, and discuss curriculum necessities so that the qualification can be finalised and implemented.

National Gas-ready Workshops project

ARA is of the opinion that gas will be the energy in demand until EVs or Hybrid Vehicle technology becomes a financially viable option. Gas conversions are entering the South African market. While it is still a relatively new concept to the consumer, it is not widely known that the technology has already been in use for many years on buses, heavy vehicles, such as trucks and forklifts in South Africa. ARA is overseeing the Gas-ready Workshops project to prepare our members for this technology. The technology would run an internal combustion engine as per normal, with combustion components.

ARA, a key member of the World Engine Remanufacturers' Association (WERC)

The WERC was initially formed in London in 2007, but lost momentum over the years, until the various country bodies re-established contact at Automechanika Frankfurt in 2019. Representatives within the remanufactures trade sector, across the world revived the WERC and the ARA NEC Chairperson was nominated and seconded as the Council's President-elect. Since the re-establishment of WERC, global membership have

increased and the collaboration between countries have brought answers and solutions to various industry matters.

Honeywell Garrett Turbocharger Training

Honeywell Garrett - Advancing Motion identified and developed online training models (1-4), which have proven to invaluable ARA and industry at large.

Conclusion

A special word of thanks to the ARA NEC, the respective Regional Executive Committees and the ARA membership-base, for your continued support and in working together played an integral role in the betterment of the motor industry, despite the challenges of the current economic climate. Since the announcement of the National State of Disaster, belonging to relevant Associations such as ARA and organisations such as the RMI has become even more critical to ensure the longevity of member businesses, and for the continued high quality service rendering to the motoring public.

During this challenging time, ARA members pulled together in a time of change and our sheer determination to adapt and to unite resulting in business continuation and growth.

Tyre, Equipment, Parts Association



The 2019/2020 financial year started off with the appointment of a new Associational

Representative, Moipone Nyambi, who joined the team from a life insurance background. Moipone took responsibility for the inland region. Enrico Phillips, who is based in Cape Town, continues to perform exceptionally well along the Coastal region of South Africa in providing guidance and support to existing members while also still growing the membership base during challenging times.

The AGMs were held around the country as required by the constitution of the RMI and where this became an interesting process was that this was the first year that the NTM merging of TDAFA and MPEA officially resulted in the birth of the new TEPA (Tyre, Equipment, Parts Association) brand within the RMI. Alongside the new Association name came the need for a complete revision of the logo of the Association. **The new logo depicts the convergence of the three paths of our members businesses: revenue, overheads and margin, distribution in various directions, and the third, an ever-expanding diversity of products and services.**

TEPA participated in the Festival of Motoring show and in Automechanika 2019, and presented the first Tyre Changing Competition at Automechanika. The competitors needed to strip a tyre from a rim, and reseal it again with Balancing as well. The top competitor's time was 1 minute and 58 seconds, this was unbelievable to watch the competitor at work.

Immediately after Automechanika, RMI CEO Jakkie Olivier, the TEPA National Chairperson, Frans Maritz, and the National Director of TEPA, Hedley Judd, travelled

on a fact-finding mission to India and the UAE regarding the trends in Tyre Shows and Fitment Centre Operations in both countries. This exercise was conducted as part of an invitation to attend the Tyre Expo in Chennai India by SING EX the Expo organisers. Valuable insights were gained regarding selling prices, costs, styles of operation, product ranges, equipment developments, and technology developments. In addition, the delegation also learnt how an expo is run and managed in India, where there are certain market similarities with South Africa. The exercise was most beneficial to how TEPA and the RMI approach particular aspects of business.

From Robert Burns in 1759 who penned the line much-used "Of mice and men the best laid plans" was very apt to what lay ahead in the balance of the year. The TEPA NEC devised and built a business plan to take the new Association forward for the next five years. With lots of detail and enthusiasm, the plan was launched at the final NEC for 2019. However, who could ever have predicted the events of early 2020 that culminated in the total, national lockdown under Alert Level 5, which had barely been lifted when the end of the financial year was suddenly upon us.

However, it was certainly not all doom and gloom for the year. In early January it was decided to find a path towards collaboration for the three predominantly Aftermarket Associations, MIWA, TEPA and ARA. The process was to embark on a number of joint initiatives, such as website structure, member meetings, and promotional material-buying. The essence of which was to realise savings

in each area with combinations of bulk values. Connected Life was approached to provide a platform for a singular approach to the websites, which has proven enormously beneficial with cross-profiling of ideas and systems.

A series of very successful collaborative members meetings were held across the country by the three associations, where sharing venues and costs realised the expected savings. Furthermore, during April 2020, under the strict lockdown regulations, TEPA in collaboration with MIWA and ARA held a successful webinar which saw 276 attendees online at the same time.

The Covid-19 lockdown had far-reaching effects across the industry and not one of our members was not negatively impacted by the process. However, our members were open to adapting to the changes in regulations and were ready to do whatever was necessary to be compliant.

The TEPA office was receiving upwards of 50 calls a day from members requiring clarification on the regulations. Thanks to a great team in the larger RMI, we were able to provide the best advice at the time to the member base. As with most things, there are unforeseen consequences – and benefits - from most actions. The most noticeable was the rapid transition to the world of virtual meetings, webinars and virtual townhalls, which enabled usually office-bound people to operate just as effectively remotely.

Additionally, a lot less time is wasted travelling to and from meetings, with substantial cost

savings. RMI members are now able to attend meetings and stay up-to-date with trends in the Association without the need to leave their office. This is expected to have a positive impact on the levels of attendance at meetings as well as deeper penetration with online voting and election processes in the 2021 round of AGMs.

In summarising the financial results for the 2019/2020 financial year, the Association has produced good results with a significant growth in the reserves. Bearing in mind that, in 2015, the original TDAFA was in the red by almost R2 million, there was concern that the MPEA reserves would be used to balance out the negative in TDAFA. However it is pleasing to note that prior to the merger of the two Associations, TDAFA was already in a positive balance of over R2 million, indicating an turnaround of close on R4 million in 4 years for the TDAFA. Hence, both MPEA and TDAFA merged finances from positive positions, not burdening either one, into the TEPA set of accounts.

In concluding this report it is pleasing to note that although the worst of the lockdown impact on commerce has passed, the aftermarket has bounced back dramatically well in comparison to the new vehicle sectors. As at the end of June 2020, the trend appeared to be that turnovers were climbing exponentially. With the noticeable difference being between the urban/metropolitan areas and the rural outlying areas, where the latter we faring better than the city-based operations. No definitive reason has been found for this other than perhaps the customer relationships in

the rural areas being of a more personal than in the larger cities.

It is also with great thanks to the members of the extended executive committee that the association has prospered well under these strange and trying times.

Frans Maritz

FMIG Group:
Western Cape TEPA chair, National TEPA Chair, RMI Vice President

Johann van de Merwe

Auto Boys:
Western cape TEPA (Parts) Vice Chair

Les Richardson

Supa Quick Silverton:
Gauteng North TEPA Chair

Stewart Vambe

Alert Engine Parts: Gauteng South TEPA chair Angie Frederic,
Supa Quick Hillcrest:
KZN TEPA (Tyres) Chair

Rajen Moodley

Capricorn Parts:
KZN TEPA (Parts) Chair

Yolandi Small

Dynotherm:
KZN TEPA (MIMA) Chair

Sean Jevon

Tiger Wheel and Tyre:
Border TEPA (Tyres) Chair

Wayne Staude

USA Spares:
Border TEPA (Parts) Vice Chair

Robert van der Merwe

Tyre Mart Grahamstown:
Eastern Cape TEPA (Tyres) Chair

Stephen Pohlman

Midas Newton Park:
Eastern Cape TEPA (Parts) Vice Chair

Morné Viviers

Auto Tyre Barkley East:
OFS/NC TEPA (Tyres) Chair
Hennie Fourie: OFS/NC (Parts) Vice Chair

Sean Harrison

Managing Director
- Hi-Q Tyres, Participant

Dawie Pretorius

Operations Manager
- Point S, Participant

Adri Koeglenberg

Franchise General Manager
- Supa Quick, Participant

Brett Lovell-Greene

Franchise development
- Supa Quick, Participant

Shannon Drake

Franchise Manager
- MIDAS, Participant

Phil Cells

Professional Alignment Technologies – Co-Opt
Training coordinator



The year ahead is expected to bring about a far faster and deeper focus on the move to digitalisation in our industry and TEPA's future operations.

We look forward to many years of growth in membership and to be able to offer value-added benefits to our members.

Overview of RMI Labour Activities



The RMI Team continues to protect and promote the interests of its members on the various Boards of Trustees for the Motor Industry Retirement Funds. Currently, more than R36bn in managed funds are under investment by the Fund Administrators with exceptional performance recorded for all of the Funds.

Motor Industry Retirement Funds

	Fund Value	Surplus	Total
Copartes	916 890 000	0	916 890 000
MIPF	5 260 754 000	1 433 435 000	6 694 189 000
AW Prov	16 018 971 000	326 095 000	16 345 066 000
MI Prov	12 547 182 000	32 102 000	12 579 284 000
MIBF	295 482 000	-	295 482 000
TOTAL	35 039 279 000	1 791 632 000	36 830 911 000

Source: Motor Industry Fund Administration | Data as at 30 June 2020.

The three-year MIBCO wage agreement the RMI negotiating team managed to conclude early in 2020 has been submitted to the Department of Employment and Labour to be promulgated and extended to non-parties. However, publication of the new agreement has not taken place as yet, and there is no certainty as to when it will.

The Motor Industry Bargaining Council (MIBCO) has been ably led by its President, Mr Lindsay Bouchier, and the MIBCO Ad Hoc Advisory Committee (in the place of the now defunct Governing Board) over the past 12 months. Although a number of challenges have emerged over the past three years, the RMI

team representing industry has left no stone unturned in ensuring that good governance will be restored. All the MIBCO administrative and provident fund collective agreements have been published and the MIBCO Inspectorate is actively conducting compliance visits to all businesses in the industry. The Dispute Resolution Centre (DRC), accredited by the CCMA to resolve employer-employee disputes in the industry, recorded exceptional rates of settlement and continues to conclude referred cases at a cost-per-case far less than what the CCMA can achieve. Self-determination, through the bargaining council system, remains the most viable alternative to government regulation of the Industry.

Employer Representivity



Employers belonging to more than 1 organisation are counted in multiple organisations.

■	RMI Employers	6 707	30.0%
■	FRA Employers	2 363	10.6%
■	NEASA Employers	998	4.5%
■	Non Party Employers	12 275	54.9%
TOTAL		22 343	100.0%

Employee Representivity



Based on employee count.

Employees at employer belonging to more than 1 organisation are counted in multiple organisations.

■	RMI Employees	136 474	43.6%
■	FRA Employees	52 092	16.6%
■	NEASA Employees	15 373	4.9%
■	Non Party Employees	109 032	34.8%
TOTAL		312 971	100.0%

Source: Motor Industry Bargaining Council, 30 June 2020.

Sick-, Accident- and Maternity Pay Fund

The Sick-, Accident- and Maternity Pay Fund continues to represent an excellent benefit for members, with healthy performance recorded. The current agreement has been extended to 31 August 2022.

The Sick-, Accident- and Maternity Pay Fund received an unqualified audit report for the period ending 31 December 2019. The table below reflects the financial position of the Fund as of this date.

Statement of Financial Position as at 31 December 2019

Figures in Rand	2019	2018
Assets		
Current Assets		
Contributions and other receivables	5 758 385	5 600 751
Cash and cash equivalents	140 246 829	122 570 450
Total Assets	146 005 214	128 171 201
Funds and Liabilities		
Funds		
Accumulated surplus	141 583 272	122 095 207
Liabilities		
Current Liabilities		
Trade and other payables	487 571	494 403
Accrual for outstanding claims	3 934 371	5 581 591
	4 421 942	6 075 994
Total Funds and Liabilities	146 005 214	128 171 201

Registration number: LR2/6/6/1). Annual Financial Statement for the year ended 31 December 2019.

The financial impact of the 13-week contribution holiday for participants in the Fund during the national state of disaster has not been accounted for and will be reported on in the next report.

It is important to note that participation in the Fund is restricted to paid-up members of the RMI only, with membership being compulsory for employees who are members of the Motor Industry Staff Association

(MISA). All non-MISA members, employed by RMI-registered employers, may participate in the Fund on a voluntary basis.

Voluntary membership by non-MISA members is at the behest of the employer and represents a benefit that is better than that provided for in the MIBCO Main Collective Agreement.



Below is a summary of benefits accruing to employees who are members of the Fund

MISA Members:

Sick leave

- First 10 days at 100% of wages/salaries
- Next 5 days at 50% of wages/salaries
- Employers will pay MISA members directly and claim the benefit back from the Fund afterwards.

All Other Employees:

Sick leave

15 days at 75% of wages/salaries

Other Benefits, for all employees:

Accident Pay

- Up to 40 days at 75% of wages/salaries Maternity Pay
- Up to 17 weeks at 30% of wages/salaries

With effect from 1 January 2020, all employees registered on the Fund will receive the following additional benefits after eight consecutive weeks' contributions:

- A death benefit of R20,000.00 per Fund member, upon the passing of the member.
- A funeral benefit of R10,000.00 for the Fund member, as well as their spouse/partner, children between the ages of 14 and 18 and R7,000.00 for children under the age of 14, to a maximum of three claims per year.
- A funeral benefit R7,000.00 in the case of the still-birth of a child of the member new benefit.

Moto Health Care Fund

The Moto Health Care Fund, the Retail Motor Industry's preferred medical aid service provider, represents good value for money with an industry-relevant benefit mix that caters for all income and age groups.

Moto Health Care is a restricted Scheme that operates in the retail sector of the automotive value chain. It was formed in 2007 when two bargaining council schemes (MIMED and Automed) merged to form a single medical scheme to cater for the healthcare needs of staff employed in the motor industry. Upon its establishment, it registered with the Council for Medical Schemes and is now fully compliant with the Medical Schemes Act.

Moto Health Care is a well-reserved scheme and has maintained a solvency ratio around 50% for the past few years. Over the last 5 years, the scheme has approved and implemented lower-than-industry-average contribution increases made possible by sound financial management and a lower-than-forecasted claims experience assisted by better outcomes management

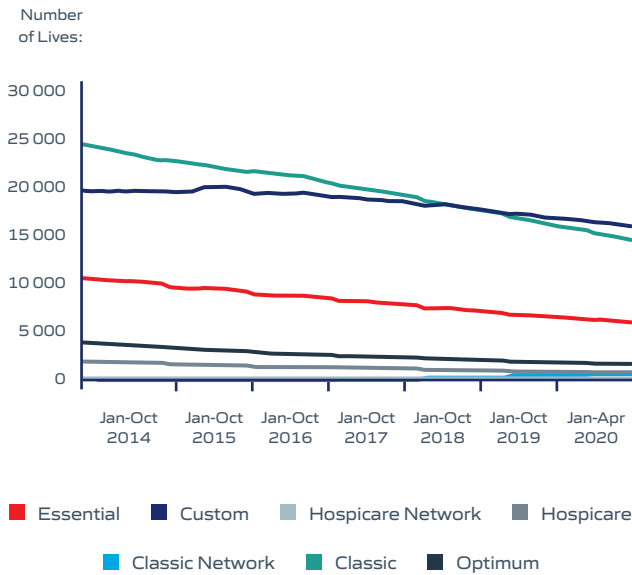
through the integrated care model and wellness coaching.

The Scheme is well governed by a Board of Trustees, independently elected by members from members, who meet regularly to oversee the affairs of the Scheme. In addition, to the Board of Trustees, an Audit Committee comprising of 3 fully independent members, also meets regularly to ensure that the Scheme is fulfilling all corporate governance obligations and makes recommendations to the Board on pertinent issues.

According to the 2018 CMS Annual Report, Moto Health Care is the 11th largest restricted medical scheme, based on the number of beneficiaries (an improvement from the 13th largest in 2017), and operates at a solvency level well above that of the regulatory minimum required level. Membership of the Fund is only open to the employees who work for an employer in the motor industry* and their dependents, and ex-employees who have retired in service.

*As defined in the collective agreements for the Motor Industry Bargaining Council of South Africa.

Number of Beneficiaries over time



The Fund is in a healthy financial position as at 31 May 2020.

	Actual	
	R'million	R PMPM*
Number of members	18 897	
Risk Contribution Income	R269.29	R2 824
(Relevant Healthcare Expenditure)	- R280.40	- R2 940
Gros Healthcare Result	- R11.11	- R117
(Non-healthcare Expenditure)	- R26.17	R274
Net Healthcare Result	- R37.28	- R391
Investment Income	- R8.68	R91
Surplus	- R45.97	- R482

*Rand per member per month.

RMI Industrial Relations Service

The RMI Regional Offices provide an ongoing IR service by highly skilled legal practitioners who specialise in labour relations, and includes offerings such as chairing disciplinary enquiries, attending to grievance meetings, representing members at the DRC, CCMA and Labour Court, assisting with the compiling EE plans and submitting reports, and managing strikes in the workplace. This service is provided to members at a highly subsidised rate that cannot be sourced anywhere else.

As a registered employers' organisation, the RMI represent an excellent value proposition for employers in the retail motor industry, who are encouraged to join the RMI if they are not already highly valued members.

During the lockdown period, the RMI entered into a cooperation agreement with the Motor Industry Staff Association (MISA) to administer the claims process for UIF and TERS benefits for an initial period of three

months, for employees employed by members of the RMI, on a no-cost and no-obligation basis.

This service was in respect of all employees employed at RMI member establishments, and not only MISA members. The total value of claims processed on behalf of members was **R40 090 351**. The table below indicates the number of members who received assistance.

Month	Employers	Employees
April	175	6 169
May	122	5 433
June	87	3 106
July	15	286
Total	399	14 994

Financial Report

Period ended 30 June 2020.

The audited financial statements were tabled for acceptance and ratification at the Board meeting held on 15 September '20. The financials continued to reflect surpluses, following the turnaround established in the 2013/2014 financial year.



For the first time since 2013 and contrary to a previous RMI Board mandate, is now a deficit budget, following as an immediate and direct result of the declaration of a National State of Disaster by the South African Government under the Disaster Management Act, 2002 on 15 March 2020.

The magnitude and severity of the Covid-19 outbreak, which has been declared a global pandemic by the World Health Organisation (WHO), is continually being evaluated, but the underlying assumption is the full extent thereof will continue to be felt for years to come.

It is thus extremely difficult to predict what the full impact will be on the retail motor sector and, by implication, the Retail Motor Industry Organisation (RMI). Thus an extremely conservative approach to

both income and expenditure is being taken and will be monitored quarterly by the RMI Board through the services of the Audit and Risk Committee. The information garnered from these assessments of actual performance against budget will be used to actively determine the ongoing strategy for the RMI.

Previous decisions taken by the Board to strengthen the RMI balance sheet by converting existing assets, both current and fixed, into more desirable properties in burgeoning areas, has been somewhat retarded, but the underlying decision to do so, remains in place.

The strategy of selling our existing properties and replacing them with new, better located properties will continue into the foreseeable future.

Revenue

1.5% *against a projected growth of:* **2.5%**

Income has increased marginally from

R70 159 895 to **R71 216 781**
as at 30 June 2019 in 2020

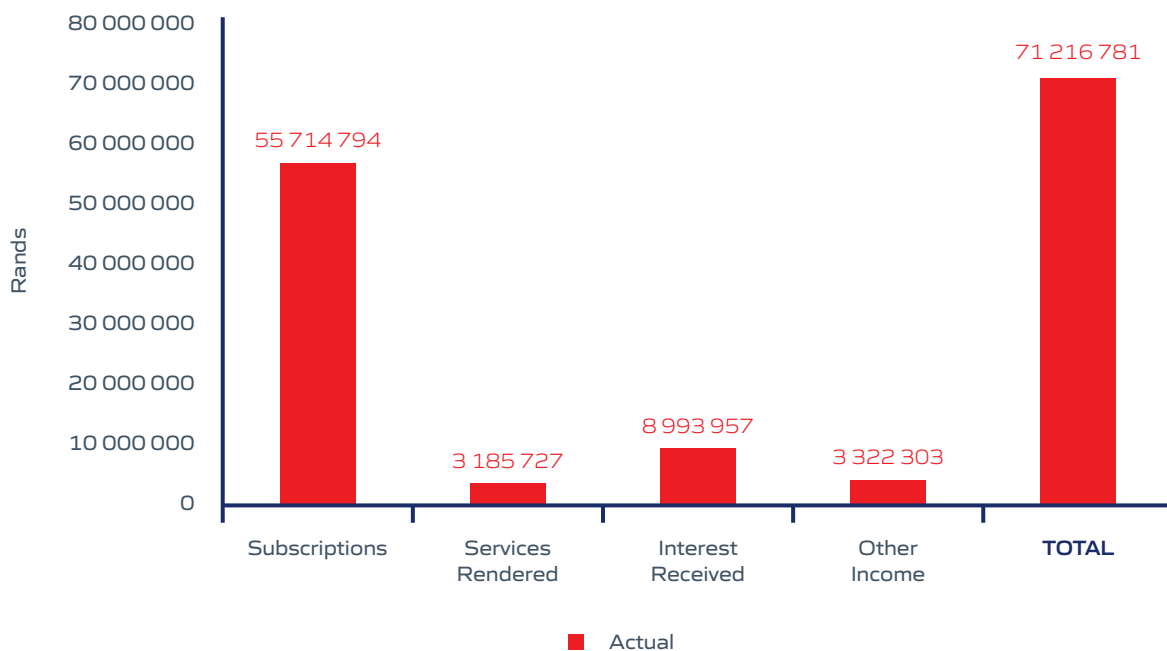
The RMI Board took a decision in April 2020 to allow businesses affected by the lockdown to carry forward a portion of outstanding balances. At the time of writing this report, a very small portion of this amount carried forward had been recovered. After some discussion regarding the treatment of this potential revenue, it was agreed

not to provide for it beyond a note to the Financial Statements of the affected Associations. The RMI cash reserves have grown during the period under review, but will certainly diminish in the new financial year, as the RMI Board provided a 35% discount, across the board, to its members to assist members with the financial

impact on business as a result of the pandemic.

Income from The Department of Higher Education and Training (DHET) for the Automotive Motor Mechanic and Diesel Mechanic Trade initiatives is ongoing and should continue until 31 March 2022.

Income - RMI & Associations 30 June 2020



Contingent Asset

The Organisation has shares in Guardrisk Insurance Company in the form of a Cell, RMI4Sure. On 1 July 2018, the Solvency Assessment and Management (SAM) regulatory treatment came into effect. The structure and the methodology required for the Solvency Capital Requirements (SCR) of the cell under SAM are very different from the previous regime known as 'Interim Measures'.

Several meetings have been held with Guardrisk and their actuarial team to ensure that the income (in the form of dividends) has being calculated correctly and that there is sufficient capital available to cover any contingencies.

This had been ascertained and, at the Board meeting on 15 June 2020, the RMI Board declared a dividend of R5 000 000 from the cell, which was paid over to the RMI in July 2020.

Expenditure

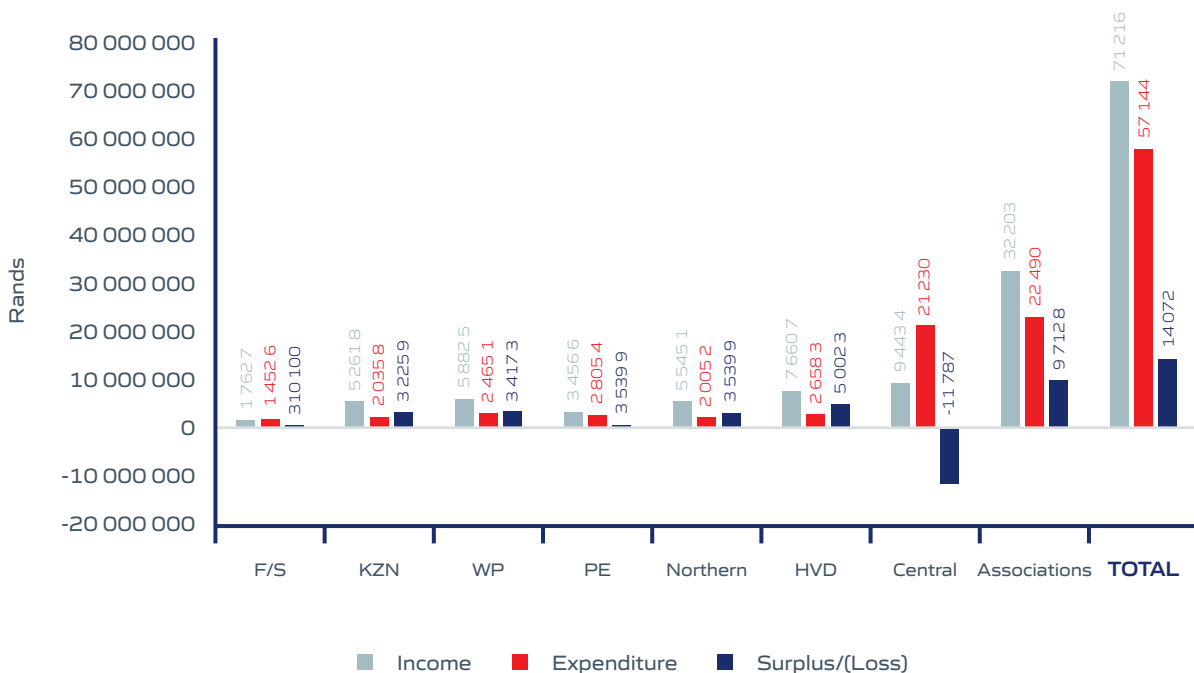
Total expenditure decreased from R60 086 227 in 2019 to:

R57 144 403
in 2020

This reduction in expenditure was mainly due to vacancies budgeted for, but not filled. From March 2020, drastic cost-cutting was implemented as the Organisation quickly made changes to accommodate the economic upheaval caused by the lockdown in South Africa.

The actual surplus achieved as at 30 June 2020 was R14 072 378. This surplus is across all Regions and Associations.

Abridged Income Statement RMI & Associations



Solvency

Current assets available for the payment of liabilities have decreased from 156 cents in 2019 to 148 cents in 2020.

The stated intention of the RMI Board to have 6 months' worth of Opex Reserve has been achieved. The RMI currently has 28.76 months of reserves, including the Associations, and 11.99 months of reserves, excluding the Associations.

SOLVENCY	
2017	1.75:1
2018	1.68:1
2019	1.56:1
2020	1.48:1

Equity

The Statement of Changes in Equity from 1 July 2019 to 30 June 2020, reflects a positive change in equity holding of R23 654 120.

This trend would explain the improvement in reserves.

Cash Flow

The RMI is arguably in its strongest financial position since inception. This is very encouraging, given the uncertain times we are experiencing. The RMI would be in far different situation if these reserves were not available to carry us through difficult times.

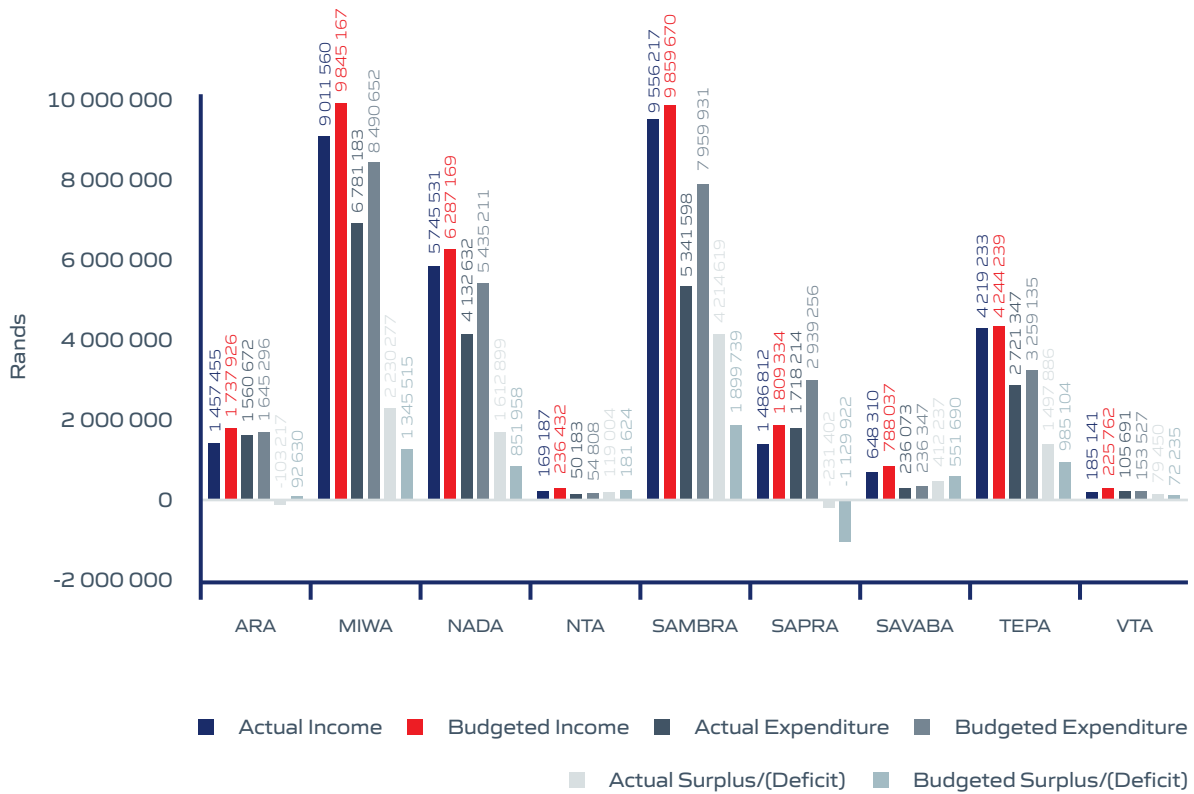
CASH FLOW (Operating Activities)		
Date	Balance	Movement
1 July 2012 Cash on Hand	23 540 420	- 1 216 629
1 July 2013 Cash on Hand	22 323 791	-1 082 248
2 July 2014 Cash on Hand	21 241 543	12 221 275
2 July 2015 Cash on Hand	33 462 818	11 785 551
3 July 2016 Cash on Hand	45 248 369	14 801 909
3 July 2017 Cash on Hand	60 050 278	15 091 073
4 July 2018 Cash on Hand	75 141 351	6 497 550
4 July 2019 Cash on Hand	81 638 901	9 072 700
5 July 2020 Cash on Hand	90 711 601	



Retail Motor Industry Organisation & Constituent Associations

Statement of Changes in Equity

Figures in Rand	Revaluation of Land & Buildings Reserve	Special Training Reserve	Other NDR	Total Reserves	Accumulated Surplus	Total Equity
Balance at 01 July 2018	5 774 714	4 169 890	3 544	9 948 148	70 372 232	80 320 380
Changes in equity						
Interest on special training reserve	-	258 322	-	258 322	-	258 322
Surplus for the year	-	-	-	-	9 815 348	9 815 348
Total changes	-	258 322	-	258 322	9 815 348	10 073 670
Balance at 01 July 2019	5 774 714	4 428 212	3 544	10 206 470	80 187 580	90 394 050
Changes in equity						
Surplus for the year	-	-	-	-	14 370 138	14 370 138
Transfer from special training reserve	-	-4 662 269	-	-4 662 269	3 898 678	-763 591
Interest on special training reserve	-	234 057	-	234 057	-	234 057
Transfer from reserves	-	-	-3 544	-3 544	-	-3 544
Transfer to non-current asset held for sale	-	-	-	-	-256 610	-256 610
Total changes	0	-4 428 212	-3 544	-4 431 756	18 012 206	13 580 450
Balance at 30 June 2020	5 774 714	0	0	5 774 714	98 199 786	103 974 500



RMI Office Bearers

Period ended 2019/2020.

RMI Board of Directors

Jeánné Esterhuizen | President
1 Jul 2019 - 30 Jun 2020

Lindsay Bouchier
1 Jul 2019 - 30 Jun 2020

Danie Fourie
14 Nov 2019 - 30 Jun 2020

Frans Maritz | Vice President
1 Jul 2019 - 30 Jun 2020

Riaan Botha
1 Jul 2019 - 30 Jun 2020

Trevor Gordon
14 Nov 2019 - 30 Jun 2020

Vuyani Mpfu
1 Jul 2019 - 30 Jun 2020

Les McMaster
1 Jul 2019 - 30 Jun 2020

Jakkie Olivier | CEO
1 Jul 2019 - 30 Jun 2020

Jeremiah Modiba | Advocate
1 Jan 2020 - 30 Jun 2020

Andrea Bogner
1 Jul 2019 - 30 Jun 2020

Barry Canning | Vice President
1 Jul 2019 - 14 Nov 2020

Ferose Oaten
1 Jul 2019 - 30 Jun 2020

Sello Molemela
14 Nov 2019 - 30 Jun 2020

Chris Le Roux
1 Jul 2019 - 14 Nov 2020

Mark Dommissie
1 Jul 2019 - 30 Jun 2020

Eduan Naude
14 Nov 2019 - 30 Jun 2020

Dupre Le Roux
1 Jul 2019 - 14 Nov 2020

Frank MacNicol
1 Jul 2019 - 30 Jun 2020

George Jacovides
14 Nov 2019 - 30 Jun 2020

Mams Rehaman
1 Jul 2019 - 14 Nov 2020

Eugene Ranft
1 Jul 2019 - 30 Jun 2020

Charles Canning
14 Nov 2019 - 30 Jun 2020

Johann van de Merwe
1 Jul 2019 - 14 Nov 2020



RMI Audit & Risk Committee

Vernon Beck
Independent Chairperson

Bruce Allen
Independent

Jan Schoeman
Chief Operations Officer

Lindsay Bouchier
Board Member

Saskia le Roux
Independent

Renee Coetsee
Financial Director

Marcel van Ruler
Independent

Jakkie Olivier
Chief Executive Officer

Gary McCraw
Company Secretary

RMI Labour Executive Committee

Northern Region: Les McMaster | Highveld Region: Henry van der Merwe | Free State/Northern Cape Region: Dewald Ranft | Western Cape Region: Frans Maritz | Eastern Cape Region: Trevor Gordon (Vice Chairperson) | Border Region: Lindsay Bouchier (Chairperson) | KwaZulu-Natal Region: Mark Roberts

Belonging is Better Business

here's why...



Your voice

RMI represents the industry at:



Centralised wage negotiations.



Various MIBCO and Industry-related Boards and committee structures.



Various South African Bureau of Standards (SABS) committees and working groups.



The National Regulator for Compulsory specifications (NRCS), defending our industry when compulsory specifications and standards are compromised.



The Moto Health Care Fund, Industry Provident Funds and the Sick, Accident and Maternity Pay Fund.



Meetings hosted by reputable organisations recognised by government, big business, consumers and relevant stakeholders like Business Unity SA (BUSA).

Legacy & unity

100+ yrs retail motor industry representation

8,000 + member businesses, our unity is our strength

Supports your business



Professional industrial relations advice ensuring procedural and substantive fairness when disciplining staff.



Chairing of disciplinary hearings and AUTOMATIC entry at the CCMA, DRC and Labour Court.



Exceptional CPA support at the National Consumer Commission (NCC) and the Motor Industry Ombudsman of South Africa (MIOSA).



Facilitation of a business-to-business complaint where both parties are RMI members, with a complaint resolution rate in excess of 95%.



Training needs and representation via merSETA and W&RSETA.



Industry-specific products like RMI4BEE, RMI4LAW, RMI4OHS and RMI4SURE.

Keeps you in the know



Industry labour relations seminars.



Automobil magazine and weekly web letters.



Commenting on industry topics in the media, and participating in and hosting numerous conventions and shows.

RMI Constituent Associations

The Retail Motor Industry Organisation (RMI) is a proactive, relevant, retail and associated motor industry organisation recognised as the leading voice in South Africa's automotive aftermarket. It serves the daily needs of its members and plays a key role in enabling motor traders to deliver a superior service to motoring consumers. Eight Associations fall proudly under the RMI umbrella. Inter-associational business-to-business trading is encouraged in the interests of all stakeholders.



ARA – Automotive Remanufacturers' Association

ARA represents the remanufacturing trade sector. This includes component remanufacturers involved in safety-critical components, inclusive of, but not limited to vehicle cooling, turbocharger and braking systems; automotive engineers who machine and remanufacture engine components by way of expert engineering – ultimately rebuilding engines to its original specifications, and specialists in the repair, servicing and remanufacturing of diesel fuel injection systems fitted to diesel engines in earth moving equipment, highway trucks, stationary engines and passenger vehicles. **ARA promotes the responsible reuse of remanufactured engine components for a 'greener' environment (carbon footprint).**

Its members are dedicated to providing consumers with only the best advice, finest service delivery, and highest quality workmanship.

MIWA – Motor Industry Workshop Association

MIWA, the Independent Workshop Association, representing general repairs, auto electrical; air conditioning; accessories and fitment as well as transmission and driveline workshops, **strives to remain ahead of the ever-changing technologies and best practices of the aftermarket motor industry.** MIWA encourages members to support inter-associational, business-to-business trading with a view to strengthen the RMI.

MIWA remains the leading resource for members ensuring continued relevance and sustainability.

NADA – National Automobile Dealers’ Association

NADA represents the interests of business people who own or operate new motor vehicle and motorcycle franchise dealerships and qualifying used motor vehicle and motorcycle outlets.

NADA is committed to the image enhancement of the retail motor business, facilitating the interface between dealers and OEMs, importers and distributors, building relationships between dealers and customers and bringing relevant industry issues to the attention of government. **NADA is the respected voice on all matters relating to motor vehicle and motorcycle dealer business.**

SAMBRA – South African Motor Body Repairers’ Association

SAMBRA is the pre-eminent motor body repair association in South Africa representing the majority of accredited motor body repairers.

SAMBRA’s grading system, which was introduced over 30 years ago, regulates repair standards in the motor body repair industry in South Africa and instils confidence in consumers and industry stakeholders alike. The Association works in close collaboration with various key industry stakeholders including Insurers, Original Equipment Suppliers, paint and equipment suppliers, the labour department and trade unions, as well as related SETAs – to

maintain industry sustainability and development. It ensures the provision of technical and business management skills training in order for members to meet the demands of the industry.

SAPRA – South African Petroleum Retailers’ Association

SAPRA represents the interests of all petroleum retailers in South Africa. Its aim is to improve growth and profitability for the investor. SAPRA plays an important role in tracking global and local trends that affect sustainability and help retailers remain relevant in an ever-changing business environment.

Retailers voice concerns through one of the seven regional chairs strategically located around the country, into a National Executive Committee (NEC), where strategy and solutions are developed. This bottom up approach is a fundamental SAPRA imperative.

SAVABA – South African Vehicle and Bodybuilders’ Association

SAVABA members are professional, certified and regulated vehicle body builders in South Africa who manufacture commercial vehicle body applications (tanker, coal, refrigerated trucks and trailers) and bus bodies (commuter and tourist type).

Members manufacture using the latest equipment and highly trained staff to ensure strict compliance with NRCS regulations; SABS standards and all other legal specifications and requirements.

TEPA – Tyre, Equipment, Parts Association

TEPA represents tyre dealers, garage and workshop equipment and tool importers and distributors, auto part wholesalers, retailers and independent operators in the aftermarket motor parts industry as well as manufacturers and importers of parts for the automotive aftermarket.

The members of TEPA represent, promote, sell and endorse the use of legitimate, bona fide, quality branded products. TEPA members also export parts, equipment and components into Africa and other countries in the world. TEPA encourages at all times inter-associational RMI business-to-business trading, intent on strengthening the RMI Organisation as a whole. TEPA is seen as the mark of integrity and fair trade for the consumer, the business operator and the government. **The Association is the legitimate voice of the tyre, equipment, and parts industry in South Africa and is positioned as an intermediary between government, business, and the consumer.**

VTA – Vehicle Testing Association

The VTA represents private vehicle testing stations that are committed to operating within the law in accordance with the Road Traffic Act and the relevant SANS standards.

In this highly regulated environment, the association represents the interests of its members at government level working groups and is committed to enhancing the reputation of the industry in all the spheres.

Contact Details

RMI Executive Committee

Jakkie Olivier
jakkie.olivier@rmi.org.za
Chief Executive Officer

Jan Schoeman
jan.schoeman@rmi.org.za
Chief Operations Officer

Reneè Coetsee
renee.coetsee@rmi.org.za
Financial Director

Gary McCraw
gary.mccraw@rmi.org.za
Company Secretary

Jeffrey Molefe | jeffrey.molefe@rmi.org.za

Louis van Huyssteen | louis.vanhuysteen@rmi.org.za

Vishal Premlall | vishal.premlall@rmi.org.za

Nonhlanhla Noni Tshabalala | Noni.Tshabalala@rmi.org.za

Department Specialists

Brand & Communication Manager
Danelle van der Merwe | danelle.vandermerwe@rmi.org.za

Transformation Director & HR Manager
Nonhlanhla Noni Tshabalala | noni.tshabalala@rmi.org.za

Financial Director
Reneè Coetsee | renee.coetsee@rmi.org.za

National Training Director
Louis van Huyssteen | louis.vanhuysteen@rmi.org.za

Regulatory Compliance Manager
Julian Pillay | julian.pillay@rmi.org.za

RMI Head Office



011 - 886 - 6300



Surrey Square Office
Park, 330 Surrey
Avenue, Ferndale,
Randburg 2194



retailmotorindustry



www.rmi.org.za

RMI Partners

RMI4BEE
066 - 292 - 0102

RMI40HS
072 - 787 - 5503

RMI4Sure
0860 - 104 - 202

RMI4Law
0861 - 668 - 677

Associational Directors and Regional Managers



Gary McCraw
Company Secretary
& NADA Director



Vishal Premllal
SAPRA Director



Jeff Molefe
Regional Manager
(Highveld/Northern)



Erwin Stroebe
Regional manager
(EC & Border)



Pieter Niemand
MIWA Director



Louis van Huyssteen
Training Director



Attie Serfontein
ARA Director



Richard Green
SAMBRA Director



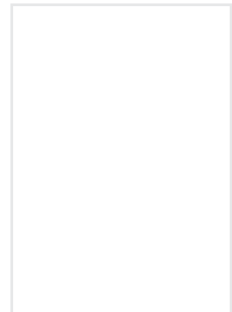
Hedley Judd
TEPA Director



Jacques Viljoen
Regional manager
(Free State & NC)



Julian Pillay
Regional Manager
KZN & Regulatory
Compliance Manager
& Director SAVABA
& VTA



Vacant Position
Regional Manager
(WC)



RMI National Office
Surrey Square Office Park
330 Surrey Avenue
Ferndale, Randburg 2194

rmi.org.za