About the BVRLA

Established in 1967, the British Vehicle Rental & Leasing Association (BVRLA) is the UK trade body for companies engaged in vehicle rental and leasing.

BVRLA membership provides a quality assurance benchmark, reassuring customers that the company they are dealing with adheres to the highest standards of professionalism and fairness.

The association achieves this by maintaining industry standards and regulatory compliance via its mandatory codes of conduct, inspection programme and conciliation service. To support this work, the BVRLA shares information and promotes best practice through its extensive range of training and events.

On behalf of its 950+ members, the BVRLA works with governments, public sector agencies, industry associations and key business influencers across a wide range of road transport, environmental, taxation, technology and finance-related issues.

BVRLA members are responsible for a combined fleet of almost five million cars, vans and trucks, supporting around 465,000 jobs and contributing nearly £49bn to the economy each year.

91% of members say that the BVRLA provides status and credibility to their organisation.

2018 Member Survey
Committee of Management

The Committee of Management is the BVRLA’s board of directors, responsible for strategic direction and policy as well as ensuring that the association is run on a sound financial basis.

Matt Dyer
Chairman

With more than 20 years’ industry experience, Matt Dyer, Managing Director of LeasePlan UK, is responsible for a business with £150m turnover, £2bn assets and 500 people.

LeasePlan UK serves a broad customer base, including corporate, public sector, SME and a growing retail presence.

Matt has fulfilled several senior roles for LeasePlan, including Commercial Director and Managing Director of LeasePlan International; he has a strong record in delivering commercial growth and strategic change. Matt has also worked abroad, in Belgium and The Netherlands, and has a significant track record in global business.

Prior to joining LeasePlan in 1996, Matt held management roles at Mobil Oil in both sales and procurement; he has also worked for Hewlett Packard.

Nina Bell
Vice Chairman

In her role of Managing Director of Avis Budget Group and Zipcar Northern Region, covering the UK, Norway, Sweden and Denmark, Nina Bell is responsible for the general management of the company’s operations and strategic direction, as well as more than 1,800 employees and overseeing revenue generation across all business sectors.

She previously held a number of senior positions in strategy and finance, working at Travelport, a global IT distribution company, where she was Vice President of Market Strategy and Planning, and President of Strategic Programmes. She qualified as a Chartered Accountant with PwC.

Freddie Aldous
1928-2017

The BVRLA said goodbye to its Honorary Life President, Freddie Aldous, who passed away in December 2017.

Freddie was an industry pioneer who had a long and illustrious career in the vehicle rental and leasing sectors.

He served as BVRLA Chairman twice, then President and, in later years, as a mark of the industry’s respect for him, Honorary Life President.

In recognition of his contribution, the association has named its conference room the Freddie Aldous Room and is introducing the Freddie Aldous Lifetime Achievement Award at the association’s Annual Dinner.

Brian Back
BVRLA Honorary Treasurer

David Hosking
Tuskerdirect

Ed Cowell
Fraikin

Gary Smith
Europcar Group UK

Henry Brace
BT Fleet Solutions

Ian Tilbrook
Volkswagen Financial Services

Jon Lawes
Hitachi Capital Vehicle Solutions

Khaled Shahbo
Enterprise Rent-A-Car

Margaret Speirs
Arnold Clark Car & Van Rental

Miguel Cabaca
Arval UK

Nick Brownrigg
Alphabet GB

Peter Cakebread
Marshall Leasing

Peter Collins
MAN Financial Services

Richard Davies
Hertz UK

Tim Buchan
Zenith
Chairman’s Comment

2018 has been a year of unprecedented trials for the vehicle rental and leasing industry.

From air quality and electric vehicles to counter-terrorism, connected vehicles and consumer finance, the period has seen BVRLA members getting to grips with a rising number of business-critical issues.

Unsurprisingly, then, it has also been a year of unprecedented activity for the BVRLA. Your association started 2018 with a clear mandate to provide stronger industry representation, a louder voice of influence and a deeper insight into the changes impacting our sector.

I am pleased to report that the last twelve months have seen a real change in our industry’s media profile, with more proactive coverage in the national and regional press and on social media.

The association has delivered more than a dozen pieces of original research and insight, much of it providing vital data to underpin our policy asks. Most compelling of all was our updated analysis of the economic impact of vehicle rental and leasing. It now tells the story of an industry that makes a £49bn contribution to the UK economy, supporting over 465,000 jobs and generating £7.6bn in tax revenues each year.

In local Town Hall workshops or in the halls of Westminster our events have been larger, more widely spread across the country, and have involved a wide range of members and other fleet industry stakeholders. 2018 has seen us invited to No 10 to discuss Mobility Credits, and sharing the Zero Emission Vehicle Summit stage with the Prime Minister.

The BVRLA is opening more doors than ever, engaging with politicians, parliamentarians and regulators on a daily basis, developing constructive and ongoing relationships.

As ever, it has been a year of both achievements and setbacks. Nonetheless, I am confident that the BVRLA’s increased investment in its research, communications and campaigning activity is already delivering some long-term benefits that extend beyond the life of any one policy issue. The wide range of activities we have undertaken in 2018 are all enhancing our sector’s ‘political equity’ and increasing its ability to influence political and regulatory decisions.

In the pages that follow, I hope we will demonstrate that your association has focused its activities on the issues that matter to you and your business.

The year began with the BVRLA fighting the corner for a rental and leasing sector that was under scrutiny from regulators, politicians and law enforcement. The media was full of stories about our industry’s potential fallibility in terms of terrorist ‘vehicle-as-a-weapon’ attacks and misselling of motor finance.

The BVRLA has worked closely with the relevant authorities to make sure that they understand how our industry works. It has also published some groundbreaking research into vehicle-based terrorism and updated its governance and training offering. In both areas the vehicle rental and leasing industry’s reputation has been enhanced and the threat of regulation has reduced.

In a related development, the association also won a major victory in persuading insurers to ‘pool’ the risk associated with major motor vehicle-related terrorist claims. The BVRLA continues to engage with the industry to deliver the expected reduction in self-drive hire insurance premiums.

This year has seen a record level of engagement with local authorities. The BVRLA and its members have spent much of the year meeting with fleet stakeholders and local policymakers to discuss a range of air quality issues and the measures being considered to address them.

The Clean Air Zones that are due to arrive in London, Birmingham, Nottingham, Glasgow, Oxford and a host of other cities in the coming years represent both a threat and an opportunity for BVRLA members and their customers. The threat looms largest for commercial vehicle operators, and the association has worked closely with its colleagues at the RHA, FTA and NFDA to lobby for greater support for truck operators.

Across the UK, the BVRLA’s air quality activity has helped demonstrate that vehicle rental, leasing and car clubs will play a vital role in delivering the transition to cleaner urban transport. Each city has its own requirements, but it is essential that we get a robust national framework that gives members the confidence to support businesses and individuals in upgrading to low or zero emission vehicles and changing their transport behaviour.

Regulatory frameworks are essential, as is a fair and well-signposted tax and incentives regime – something that has been sorely lacking in 2018. A ‘Perfect Storm’ of mismanagement and confusion around the withdrawal of plug-in vehicle incentives, the publication of new company car tax rates and the tax impact of the new WLTP emissions regime is putting the fleet sector under intolerable pressure.

Persuading the government of the need to act – and of the damage from not doing so – has been one of the association’s toughest challenges in 2018.

Nonetheless, progress has been made. We have gained unprecedented levels of access to the Treasury this year and have been able to present them with clear, comprehensive and compelling evidence on...
what needs to be done. We are hopeful that the tax review announced in the 2018 Budget will be just the start of a more constructive partnership with government that delivers a reliable tax base and a roadmap towards zero-emission motoring.

The BVRLA continues to have one eye on the future, where the most pressing issue is the arrival of the ‘mobility services’ era and ever-increasing demands to integrate our industry’s road transport offerings with other modes.

Mobility as a Service (MaaS) is one of the most over-hyped phrases of recent years, but the concept is high up the agenda of every transport policymaker across the UK, thanks to its promise of reducing congestion, cutting emissions and improving accessibility in cities. Once again, the BVRLA’s role is to ensure that the vehicle rental and leasing industry’s voice is heard and that members can enjoy a level playing field when it comes to tax and regulation.

Looking back on all this activity, 2018 feels like a year when the BVRLA and its members have gained strength in adversity. By raising its voice, increasing its influence and gaining greater insight, the industry is in a better position than ever to shape its own destiny.

We thank you for your support and look forward to continuing our work in 2019.

Matt Dyer, BVRLA Chairman
and Managing Director of LeasePlan UK
Chief Executive’s Foreword

In December 2017 the BVRLA launched its first-ever Three-Year Plan, outlining our key strategic priorities and committing the largest financial investment the association has seen in its 50 year history.

Twelve months on, many of these investments are now in place and have enabled us to scale up both our operations and our effectiveness. We have now updated our plan to emphasise the strategic priorities we will be using to evaluate our activities and progress.

We will be focused on delivering a supportive regulatory and economic environment that helps members grow their businesses.

We will enhance the brand and reputation of the BVRLA and its members by setting a benchmark for compliance, sustainability, security and customer service.

Finally, we want our members to lead the transition to ‘future mobility’ and will help them to embrace new technology and innovation so that they can help the UK tackle its transport challenges.

It is vital that we increase our capabilities and ambition as we continue to serve the needs of a large and diverse group of members. I am delighted to report that the BVRLA bucked the trend of many trade associations by growing its membership again over the last twelve months. We now have over 950 vehicle rental, leasing and car club members, who own and operate a combined fleet size of nearly five million cars, vans and trucks.

This is not just an endorsement of the work of the BVRLA. It also reflects the growing trend from vehicle ownership to usership and the increased ‘consumerisation’ of our industry.

As the popularity of transport as-a-service increases, members sign-up with us because they need an organisation that provides reliable market insight and can explain the needs of their evolving business models to policymakers. As our industry faces an increasing media and regulatory spotlight, it is more important than ever that it comes together and demonstrates that it sets and maintains the highest standards.

This is where our strategic priorities come from, and this is where we are investing for the future.

We have welcomed three new staff to our policy and communications teams this year and retained the services of two external public affairs agencies. These additions have provided much-needed expertise, capacity, contacts and creative input on a range of vital campaign areas, helping us to put on our biggest-ever Parliamentary Reception, a series of regional air quality roundtables and a workshop on the future of Motoring Taxation.

2018 also saw us expand our research budget with the aim of providing greater insight into the trends shaping the rental and leasing market and more evidence to support our lobbying. Recent highlights include our latest report on the Economic Impact of the Vehicle Rental and Leasing Sector and our Fleet Sustainability Credentials, which are already helping to demonstrate the vital role BVRLA members will play in tackling air quality issues. Behind the scenes, we have been working with members to crunch the numbers on company car tax, producing vital new data that shows how this sector is over-taxed and under-appreciated for the role it plays in driving uptake of low-emission vehicles.

Maintaining and demonstrating high levels of customer service and regulatory compliance is a priority for every member, and the BVRLA continues to increase its value proposition in this area. Our government-approved Alternative Dispute Resolution service has experienced another record year that saw it deal with more than 4,000 complaints on behalf of members and their customers, from across the UK and Europe.

As the leasing broker sector continues to grow, so has our inspection process, which now features a full-day audit that provides a thorough assessment against FCA compliance. In 2018 the association carried out more than 450 audits of rental and leasing broker members, providing invaluable feedback that can be fed back to participants and used to raise industry standards.

Much of the feedback now gets incorporated into our learning and development activities, which have also made significant progress this year. Our e-Learning platform recently welcomed its 1,000th subscriber and continues to bring affordable and convenient compliance training to members across a range of topics, including fraud avoidance, counter-terrorism, safeguarding the vulnerable and data protection.

The growth of our e-Learning platform is a partial reflection of the difficulty many members, particularly SMEs, face in spending time away from the office or branch. We have welcomed record numbers of people to our forums and conferences this year, but our range of free topical webinars have had a particularly big impact. Almost a thousand of you have registered for our Budget, counter-terrorism and GDPR webinars this year, with a similar number catching up via our growing YouTube channel.

Digital investments are driving huge levels of innovation across our industry and the BVRLA is no different. Our newly updated, GDPR-compliant CRM
system is now integrated with our new website. As a result, our content and communications are more mobile-friendly, dynamic, and easy to find and consume.

We are aware that, from a member communications perspective, one size does not fit all. A key benefit of this investment is that we are now able to deliver more personalised information that fits your profiles and business needs.

Your needs continue to drive the decisions we make. Our latest Member Survey was our largest and most comprehensive yet, with more than 500 responses from over 280 different companies. We have summarised the results throughout this Annual Review. Please rest assured that we are already digesting this feedback and using it to guide our plans for the years ahead.

Whether you are responding to our surveys, attending our events or participating in one of our committees and workshops, your contributions are more vital than ever as we negotiate an increasingly uncertain political and economic landscape.

We thank you for this support and look forward to working with you in 2019.

Gerry Keaney, Chief Executive.
The Value of Membership

BVRLA membership represents a mark of quality and professionalism, providing members’ customers with the reassurance that they are dealing with a company that meets the highest industry standards.

From small and medium-sized businesses to large PLCs, the BVRLA welcomes all those who are committed to delivering excellence.

Industry Representation
The BVRLA works with members, partners and advocates to actively lobby policymakers and regulators in the best interest of the industry, mitigating the risk of over-regulation, anti-competitive behaviour or detrimental policymaking that could adversely affect the vehicle rental, leasing and fleet sectors.

Knowledge Sharing
The BVRLA informs, advises and updates members on the latest industry news, insights and developments via a series of regular communications, including published guidance, weekly email updates, daily social media posts and regular face-to-face engagement opportunities.

Reputation Enhancing
By adhering to best practice and delivering the highest industry standards, BVRLA members can differentiate themselves from others, assuring customers that they are dealing with a professional company who is subject to regular inspection and adheres to the BVRLA’s mandatory Code of Conduct.

Developing Skills
Via a combination of free and paid-for webinars, e-learning modules, guidance documents, training courses, forums, seminars and conferences, the BVRLA helps members to develop skills across their organisations, building capability and driving high standards of service.

Dispute Resolution
Since 2016, the BVRLA has provided a government-approved Alternative Dispute Resolution Service (ADR) giving added reassurance to members and their customers that they have somewhere to go should they find themselves unable to satisfactorily resolve a dispute directly.

121 organisations joined the BVRLA family during 2018*

*Figures as at 19 November 2018
Customer Qualification
The BVRLA RISC Database provides members with the added reassurance that the person they are renting or leasing a vehicle to does not pose a risk. With over 8,000 individuals and companies previously identified as ‘problem customers’, this check is invaluable to the customer qualification process.

Legal Documentation
The BVRLA provides members with VE103B Certificates to issue to customers taking rental or leased vehicles abroad. Having this legally required document to prove ownership ensures that the vehicle does not get refused at the border, or, worse still, impounded.

Get involved...
To find out more about joining the BVRLA family, contact membership@bvrla.co.uk.

Membership was made easy and we felt welcomed.

2018 Member Survey
Members’ Views

The 2018 Annual Members Survey canvassed the opinions of over 5,000 individuals from across all sectors of membership to gain valuable insight into members’ views. These views and opinions enable the BVRLA to understand members’ priorities, which informs where the association’s resources and services should be focussed in the year ahead.

As a small operator I am very happy. When I have called for advice, I felt supported.

70% would recommend the BVRLA
The BVRLA is an industry body I can trust. A great reputation.

2018 Member Survey

The important issues
What members consider to be the TOP 5 policy areas for the BVRLA to focus on in 2019:

- **62% Economy / Brexit**
- **48% Regulation**
- **43% Taxation**
- **41% Environmental**
- **30% Vehicle Technology**

The Value of Membership
What members consider to be the TOP 5 most important benefits of membership:

- **91%** Status and Credibility
- **87%** Voice of the Industry
- **87%** Information and Advice
- **78%** Training & Events
- **68%** Conciliation Service
Government Engagement

The BVRLA has been actively campaigning the UK government on behalf of the industry to ensure that regulation and legislation affecting members is fair and supportive of commercial growth.

During 2018, the BVRLA has grown its internal policy and communications teams and enlisted the support of specialist public affairs agencies WA Communications and Tendo to strengthen the association’s ability to be a louder voice of influence amongst policymakers and influencers.

Air Quality

Parliamentarians support BVRLA Plug-in-Pledge

30 MPs and Peers joined over 100 BVRLA members and guests at a Parliamentary Summer Reception in the House of Commons to launch the BVRLA ‘Plug-in Pledge’, outlining the vehicle rental and leasing sector’s commitment to increasing its annual purchase of new plug-in vehicles from 17,000 to 300,000 per year.

Whilst at the reception, MPs and Peers added their names in support of the Pledge and took the opportunity to voice their appreciation for the leading role BVRLA members are taking in the drive to improve air quality. Since the event, around 45 Parliamentarians have pledged their support.

The coming decades are expected to be transformative for our motor industry, our national infrastructure and the way we travel... We want to work in partnership with industry and businesses to make these shared ambitions a reality, so we welcome the commitment made by the BVRLA today.

Transport Minister Jesse Norman MP, July 2018

94% of members say the BVRLA is an important voice for the industry

2018 Member Survey

Top 3 most campaigned policy areas in 2018:

1. Taxation
2. Air Quality
3. Vehicle Terrorism
39 meetings with Ministers, MPs and Select Committees during 2018

81 meetings with Government officials and Special Advisers in 2018

25 Parliamentary Questions were put to ministers by MPs on behalf of the BVRLA during 2018

8 MPs supported a BVRLA priority in Parliamentary Debates during 2018

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**Security**

**BVRLA protects the rental sector by helping to secure Motor Insurance Bureau 'YES VOTE’**

In July 2018, the Motor Insurance Bureau (MIB) announced that UK motor insurers have voted for MIB to handle and pay the claims from victims involved in a terrorist event where a vehicle is used to kill or injure.

This was a huge success for the BVRLA, which had been lobbying on the issue following a spate of terrorist attacks involving rental vehicles.

We are delighted that the motor insurance market has agreed to mutualise this risk instead of leaving individual insurers to carry the risks associated with motor claims arising from terrorist attacks. This provides much needed reassurance for the vehicle rental industry.

Gerry Keaney

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I should thank all those involved in the sector for their advice and briefings since last June for the various meetings and events – the BVRLA and Thrifty are just the latest two.

Neil Coyle MP, Counter Terrorism and Border Security Public Bill Committee hearing, July 2018
Regional Engagement

During 2018, the BVRLA has been working with members, trainers, local authorities, trade media and other industry bodies, helping to develop knowledge and skills and taking the voice of the industry out to regional policymakers.

Air Quality

Regional Clean Air Zone roundtables

The BVRLA has hosted a series of regional roundtable discussions on the topic of CAZs in partnership with the Energy Saving Trust, Fleet News and ACFO. Each of these events brought local authority representatives from Leeds, Nottingham, Derby, Birmingham and Glasgow together with local businesses, fleet managers and BVRLA members to enable discussions on the potential impact of these zones.

A total of 38 individual local businesses and members attended the regional roundtables, representing public services such as NHS Trusts and police forces, through to utility providers and commercial groups. All of the roundtables produced very positive feedback from council members, officials and participating members. The discussions also provided invaluable insights which have supported the formulation of a set of key recommendations from the association on this topic.

“This roundtable event will give us a perfect platform to stimulate some great discussion and no doubt provide us with plenty of information to include in our proposal to government.”

Councillor Lucinda Yeadon, Leeds City Council

 BVRLA Training & Accreditation in the Regions

- IMI Rental Operator Skills Certificate
- Introduction to the Daily Rental Industry
- IMI Technical Customer Service Staff (Level 3)
- IMI Technical Customer Service Staff (Level 2)
- Customer Service Workshop
- Driving Skills and Knowledge
- BVRLA Fair Wear and Tear Training
- GDPR Workshop
- Introduction to the Vehicle Fleet Industry
- NLP Skills for Effective Selling
- Project Griffin – Counter-Terrorism Workshop
- Selling Contract Hire
- Certificate in Fleet Management

 BVRLA Conferences

- Fleet Technology Congress
- Industry Outlook Conference
Regional forums have been very helpful.

2018 Member Survey

BVRLA industry experts are guest speakers

- FT Future of the Car Summit
- Zero-Emission Vehicle Summit
- London Automotive Forum
- Resolution Foundation Future Mobility Event
- BT Fleet Summit
- Intelligent Mobility Conference
- Tech Xclerate Urban Mobility Summit
- ICFM Conference
- ACFO Annual Conference
- Low CVP Conference
- Energy Saving Trust Air Quality Summit

BVRLA Roundtables

- Clean Air Zone roundtables

Get involved…

To find out more about the BVRLA’s planned regional engagement opportunities, contact events@bvrla.co.uk.
Communications

In addition to increasing the amount of content published via the media and the association’s own platforms, the BVRLA has increased the reach of its communications by expanding the range of channels used to include members’ own channels and government-owned channels. This has enabled the association to reach more people across a broader range of target audiences.

Member communications

The BVRLA Weekly Update and the association’s bimonthly newsletter, BVRLA News, provide members with regular updates to ensure that they are kept informed of any news, developments and regulatory changes affecting the industry, as well as the latest news on the association’s activities.

Digital and social

The BVRLA has made a significant investment into the development of a new improved website. Launched in December 2018, the site includes enhanced functionality for members, more consumer-facing content and provides a better user-experience for all who use bvrla.co.uk as a key information resource.

Corporate communications

The BVRLA produces two annual corporate publications: The Annual Review provides an overview of the association’s deliverables at the year-end and the Annual Report publishes the association’s statutory financial statement. In 2018, the association also launched a new corporate communications product, the BVRLA Three-Year Plan, which focuses on setting out the association’s strategic priorities for the year ahead.

During 2018, the BVRLA has started to publish BVRLA News on members’ intranets to help keep employees informed of the latest news from the association.

291 individual news stories published in Weekly Updates during 2018

BVRLA Twitter followers, up 17%

BVRLA LinkedIn followers, up 20%

All figures correct as at 22 November 2018
Media & PR

2018 saw the association receiving unprecedented levels of national, regional and trade media coverage online, on TV and in print. This increased exposure of the BVRLA brand has helped to bring the association’s voice of influence to a broader audience.

40 press releases issued during 2018

uplift in BVRLA media coverage during 2018 37%

Stories relating to regional Clean Air Zones, the BVRLA Plug-in-Pledge, company car tax, motor finance and vehicle terrorism were all of interest to the mainstream media. The issuing of several consumer advice pieces also led to coverage relating to taking vehicles abroad, leasing scams and what to do in the event of a dispute with a rental or leasing company.

By adopting a proactive PR strategy, the BVRLA has often led the news agenda, building awareness of, and advocacy for, the association’s lobbying work as well as promoting the benefits of using a BVRLA member.

If hiring in the UK, check to see if the company is a member of the BVRLA. This gives you more rights in the event of a problem.

Financial Times, May 2018

All figures as at 23 November 2018
Research & Insight

During 2018 the BVRLA carried out more research projects than ever before, delivering against the commitment in the Three-Year Plan to increase the research budget, collate more data and develop deeper industry insights to strengthen its evidence-based lobbying.

The association produced regular sector-specific reports and conducted research activity focusing on a range of business and policy areas.

2018 saw significant investment being made to build deeper industry insight across the rental sector. Four policy areas were also studied in-depth:

1. Economy

2. Taxation

3. Air Quality

4. Vehicle Terrorism

The BVRLA increased its research budget by 70% during 2018.
This report underlines the role that rental and leasing plays in the UK economy. The industry will play a crucial role in delivering the UK’s transition to connected, autonomous and zero-emission road transport in the years ahead.

Gerry Keaney
Compliance & Advice

During 2018, the BVRLA has continued to work closely with the AA and Consumer Credit Advisory Service (CCAS) to carry out regular compliance audits across new and existing member organisations throughout the UK.

The BVRLA audit regime forms part of the association’s wider governance programme to ensure that members are adhering to the highest industry standards and, during 2018, the audits have been strengthened to provide a more in-depth, robust assessment of processes, procedures and standards.

A combination of desktop audits and on-site visits verify that members are adhering to the association’s Code of Conduct and are meeting their regulatory obligations. Advice and guidance are provided to address any shortcomings, ensuring that best practice is met and standards are raised.

The BVRLA compliance team works closely with colleagues in policy, communications, dispute resolution and training to ensure that members are kept informed of any issues and regulatory or legislative changes affecting the industry.

The association also issues VE103 certificates to members, enabling their customers to meet their legal obligations when taking vehicles abroad.

500
BVRLA new and existing member inspections carried out during 2018

VE103B certificates issued during 2018

54,778

It was a good process to go through which I believe will help... any leasing broker’s business. My advice is to embrace the BVRLA inspection, learn from it and use it to fill any knowledge gaps.

2018 Leasing Broker Member

Regulation & Compliance

Enhanced audit regime launched in 2018

Driven by members’ feedback, the BVRLA introduced a new, tougher, audit regime during 2018. With the support of committee members, the decision was taken to introduce two new initiatives to enhance and strengthen the value and effectiveness of the inspection regime.

The rental inspection regime became more robust with the introduction of unannounced visits, a deeper-dive inspection and an improved feedback report.

The leasing broker inspection regime was also enhanced by introducing:

1. Full day inspections to allow time for looking at members’ compliance monitoring and sales processes, providing a deeper-dive enhanced inspection.
2. More detailed interviews with senior management and other relevant members of staff as part of the inspection to test their understanding of regulatory requirements.
3. A revised ‘Get Well’ process which may subject members to a further remote desktop review if needed to support the member’s implementation of mandatory polices and registers.
The audit resulted in some extremely valuable advice. Great at giving advice on difficult questions.

2018 Member Survey

Over 5,000 requests for advice answered during 2018

93% of BVRLA members consider information & advice to be an important benefit of membership

BVRLA Member Survey

The health-check visit was very interactive, and recommendations made were on point.

2018 Member Survey

68,000 + Fair Wear & Tear Guides issued during 2018
I am very impressed by how quickly and efficiently your department has handled my complaint.

A member’s customer 2018

Dispute Resolution

The BVRLA’s government-approved Alternative Dispute Resolution (ADR) service provides members’ customers with the added reassurance of knowing that they have somewhere to go should they need to escalate a complaint that has not been resolved directly.

Once internal complaints processes have been exhausted, members’ customers can escalate the matter to the BVRLA free-of-charge, for independent adjudication. The reassurance of knowing that this service is available can incentivise customers to prefer a BVRLA member when deciding which company to use to rent or lease a vehicle.

The ADR is not only a valuable member benefit, it is also a key part of the wider BVRLA governance programme, helping the association to keep abreast of any emerging issues and trends that may require addressing through additional industry training or guidance.

20 days was the average time taken to conclude cases during 2018

The BVRLA encourages members to welcome feedback from customers, as that is what drives a culture of continuous improvement and ultimately makes for a better customer experience.

73% of members consider the BVRLA dispute resolution service to be important to them

2018 Member Survey

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2018 Member Survey
Over 2,200 new records added to the BVRLA RISC Database during 2018

The BVRLA RISC Database holds the details of over 8,000 individuals and companies who have been identified as posing a potential risk, due to having previously failed to comply with the terms and conditions of a rental or lease contract.

Members can access the BVRLA RISC Database as part of the customer qualification process, to help protect the asset, mitigate the risk of releasing a vehicle to the wrong person and avoid future dispute.

Demand for the ADR has increased by almost a third during 2018, driven largely by the continued increase in personal contract hire (PCH) and there being a greater awareness of the service. Mainstream media and consumer advice outlets have been actively encouraging consumers to do business with companies that provide an ADR, as this gives consumers more rights. The BVRLA welcomes this and has expanded the ADR team to ensure that service levels can continue to be met.

The European Car Rental Conciliation Service (ECRCS)

The ECRCS has been run by the BVRLA on behalf of Leaseurope in Brussels for the past eight years. The service helps customers with unresolved complaints concerning cross-border vehicle rentals within Europe. Member organisations include Alamo, Avis, Budget, Enterprise, Europcar, Firefly, Hertz, National and Sixt.

2,100 cases handled during 2018

Thank you. It is reassuring to see that consumers still have options to defend their interests.

A member’s customer 2018

You provide an excellent service. Thank you!

1,700 ECRCS cases handled during 2018

Regulation & Compliance

Customer qualification

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Members can access the BVRLA RISC Database as part of the customer qualification process, to help protect the asset, mitigate the risk of releasing a vehicle to the wrong person and avoid future dispute.
Key annual events...

The BVRLA hosted a wide range of different events during 2018, including forums, webinars, roundtables and the association’s four flagship annual events.

Around 300 industry leaders convened at this year’s two annual conferences to hear expert views and opinion on a range of subjects affecting the industry.

**Fleet Technology Congress**
Technology was the focus of the day, with specialists sharing views and opinions on issues such as the future of electric motoring, understanding connectivity and vehicle data, and mobility as a service.

**Industry Outlook Conference**
Keeping an eye on the year ahead, industry experts shared their views on what they consider will be the hot topics affecting the industry in the year ahead. Presentations, panel debates, breakaway discussions and networking with industry colleagues form part of the day.

“I came away energised about strategy and with a great overview of what issues are important in the industry now and in the future.”

**Parliamentary Reception**
Around 100 BVRLA members and guests were joined by 30 MPs and Peers at the House of Commons, where the association unveiled its Plug-in Pledge, reinforcing the industry’s commitment to driving the uptake of electric vehicles.

“The Parliamentary Reception in the summer was great.”

52% annual increase in event attendance during 2018

27 BVRLA events hosted during 2018
Annual Dinner

941 tickets sold for the association’s Annual Dinner. The industry’s most illustrious social gathering was a huge success, with guests enjoying the London Hilton’s fantastic food – whilst stand-up comedian and TV panel show star Katherine Ryan kept everybody entertained.

The evening was excellent. My colleagues and guests had a super time.

Get involved...
To find out more about how you can attend, sponsor, exhibit or speak at a BVRLA event, contact events@bvrla.co.uk.

More members than ever before attended a BVRLA event in 2018.
The BVRLA delivered a record number of training and professional development opportunities during 2018, enhancing the skills and knowledge of employees across all core membership sectors, helping to build capability, raise standards and support member compliance.

The association has made learning even more accessible to a broader range of individuals by offering formal classroom training, group knowledge-sharing and remote distance-learning opportunities. Via a combination of free and paid-for webinars, e-learning modules, guidance documents, training courses, forums, seminars and conferences, the BVRLA encourages members to promote a culture of continuous professional development.

Every person working in the industry should go on the BVRLA Fair Wear & Tear training course. Excellent.

2018 Course Delegate

10,856 CPD hours delivered by the BVRLA during 2018

45 BVRLA training courses delivered in 2018

78% of members consider training and events to be important to them

2018 Member Survey
Learning & Development

The flexibility and cost-effectiveness of learning remotely via the BVRLA e-Learning Platform and the association’s series of webinars have made these two methods of learning the most popular during 2018.

Webinars

During 2018, the BVRLA ran eight live webinars covering a range of subjects including customer service, GDPR, treating customers fairly, conflicts of interest and incentives, commissions and remuneration, counter-terrorism awareness, leasing broker audit programme and 2018 post-Budget analysis.

The BVRLA e-Learning Platform, developed in partnership with:

2018 post-Budget analysis webinar attracted unprecedented numbers of attendees with 236 tuning in live.

e-learning

During 2018, four new packages were launched. Two tailored for leasing broker members and two for rental and commercial vehicle members. Each package contains ten learning modules providing generic and sector-specific governance and compliance training to meet the requirements of the Financial Conduct Authority, funders and the BVRLA Code of Conduct.

“Get involved…”

To find out more about the BVRLA’s learning and professional development opportunities, contact training@bvrla.co.uk.

“Leasing Broker Member, Select Car Leasing

The BVRLA e-learning portal definitely helps demonstrate that we are taking compliance seriously.”

Individual users registered for e-learning in 2018

1,025

40 new e-learning modules launched in 2018

1,456 individuals have tuned into a BVRLA webinar during 2018

Figures as at 19 November 2018

The BVRLA Fair Wear & Tear training course was the most popular course during 2018, closely followed by the counter-terrorism awareness course.

Webinars

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The BVRLA e-Learning Platform, developed in partnership with:
Working Groups

During 2018, the BVRLA hosted nine different working groups, providing specialists from across member organisations with the opportunity to come together to discuss a particular issue affecting the industry. Members from across all sectors, and from businesses of all sizes took part.

150 individuals attended a BVRLA working group in 2018

62% of members feel involved with the BVRLA

Plenty of interaction in many forms during 2018.

2018 Member Survey
The Tax Advisory Working Group has been established to bring together tax specialists from a cross-section of member organisations, who convene quarterly to discuss and consider the impact of future taxation issues affecting the industry.

During 2018, the group has helped to shape the BVRLA tax-related policy asks in areas such as Company Car Tax and Vehicle Excise Duty, and was instrumental in influencing the decision to invest in a market survey to build an evidence-based case to persuade policymakers of the benefits of having a fairer company car tax regime.

The group also formulates and distributes general advice and provides clarity on key tax issues affecting members and monitors legislative and tax policy proposals within the UK and EU.

The BVRLA and its members also took part in a Vehicle Terrorism Working Group, hosted by the Department for Transport, to ensure that the views of the sector were considered by policymakers looking to mitigate the risk of rental vehicles being used as weapons in terrorist attacks.

45 organisations took part in 9 BVRLA Working Groups during 2018
Residual Value and Remarketing Committee

The RVR Committee consists of member representatives from the rental, leasing and fleet sectors who focus on issues relating to the residual value of vehicles and resale as part of the de-fleet process.

One of the main areas of work currently being undertaken by the committee is around air quality and the impact the various regional proposals being considered could have on residual values for diesel vehicles.

Other areas we have been looking at in 2018 include best practice around data deletion from vehicles at end of rental and lease, a review of the car fair wear and tear guide, remarketing messages for electric vehicles, and discussion of the ASA ruling with regards to the selling of ex-rental and leased vehicles.

Objectives:

- Determine the content of the Residual Value and Remarketing Forum, which takes place three times a year.
- Identify and address the key remarketing and vehicle residual values issues.
- Comment on current and future legislative issues affecting remarketing and residual values.
- Creating the environment for members to establish and share industry best practice in areas such as vehicle disposal and vehicle collection, and develop suitable training programmes where gaps are identified.
- Assess economic forecasts and implications of fiscal policy changes that would impact upon the future value of vehicles.

Get involved...

This committee meets three times a year in Amersham. To express an interest in taking part or to find out more about attending one of the three annual regional RVR Forums, contact events@bvrla.co.uk.
The TOM Committee consists of member representatives from the rental, leasing and fleet sectors who have an interest in new technologies and innovations affecting operational effectiveness.

Objectives:

- Determine the content of the BVRLA Technical and Operational Management Forum, which takes place three times a year.
- Stimulate discussion and debate on issues relating to vehicle service and repair, as well as vehicle and contract administration.
- Improve communications between vehicle manufacturers, suppliers, service providers and BVRLA members.
- Promote best practice and administration improvements to provide added protection for members under their ‘duty of care’ responsibilities.
- Discuss and review impending legislation to protect BVRLA members’ interests and promote benefit to the supply chain.
- Continue to develop professional standards in the sector by providing members with technical and customer service support training, and development and accreditation opportunities.

One of the main areas of work currently being undertaken by the committee has been around the impact of the new worldwide harmonized light vehicles test procedure (WLTP), including how to manage customers through the change, and producing guidance for the wider membership.

Other areas we have looked at in 2018 include improving relationships with private parking companies, developing fleet services with the DVLA, and making improvements to the IMI accreditation to take into account developments in hybrid and electric vehicle technology.
Commercial Vehicle Committee

The Commercial Vehicle Committee consists of member representatives from a cross-section of large and small organisations operating LCVs and HGVs.

Peter Collins
Committee Chairman
and MAN Financial Services
Director

Committee Members:
Andrew Goodwin    BT Fleet
Andrew Morley     Prohire
Andy Hill         Lex Autolease
Charles Starr     Close Brothers Commercial Vehicle Solutions
Colin Melvin      Fraikin
Dave Adderley     Enterprise Flex-e-Rent
Dean Hedger       Alphabet GB
Dominic Hutchinson Hitachi Capital Commercial Vehicle Solutions
Ian Martin        BT Fleet
Lisa Spong        LCV Hire Solutions T/A Reflex Vans
Mark Gallimore    Essential Fleet Services
Matt Cranny       ARI Fleet
Nigel Martin      Ryder
Paul Winter       Turner Hire Drive
Philip Moon       DAF Trucks
Ryan Long         Zenith
Stuart Russell    Europcar UK
Tim Bailey        Northgate Vehicle Hire

The Commercial Vehicle Committee has been principally concentrating on air quality in 2018, in particular lobbying at a national and regional level to ensure that clean air zones and other air quality measures being considered do not adversely impact the sector. As HGVs are one of the most frequently impacted vehicles within the planned zones the committee has offered essential guidance on the association’s related approach and recommendations.

Another issue upon which the committee has been focusing its efforts is the government’s review of van VED tax. Committee members have provided important insights to inform the association’s consultation response and related campaigning activity.

In addition, the committee has helped steer and advise the association’s work to prevent the use of vehicles as weapons in acts of terror, resulting in the successful lobbying of the Motor Insurance Bureau for mutualisation of risk by insurers.

The committee has also been keeping a watching brief on the direct vision standard being considered in London and assisting with the association’s response regarding changes to the company van tax regime.

78% of Commercial Vehicle members are satisfied with the BVRLA.

Leasing Broker Member 2018

13% growth in CV members’ combined fleet size during 2018

65% of BVRLA members’ combined HGV fleet is CAZ-compliance, compared to 36% of the wider UK fleet

Get involved...
This committee meets quarterly in Amersham. To express an interest in taking part, contact amanpreet@bvrla.co.uk.
Leasing Broker Committee

The Leasing Broker Committee consists of member representatives from a cross-section of large and small organisations, including intermediaries operating in vehicle leasing and their funders.

The BVRLA are really looking out for our wellbeing, making sure that we are doing everything right.

Leasing Broker Member 2018

Committee Members:

<table>
<thead>
<tr>
<th>Name</th>
<th>Company</th>
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<tbody>
<tr>
<td>Alan Carreras</td>
<td>Bridle Vehicle Leasing</td>
</tr>
<tr>
<td>Andy Chatwin</td>
<td>ALD Automotive</td>
</tr>
<tr>
<td>Chris Swallow</td>
<td>Hitachi Capital Vehicle Solutions</td>
</tr>
<tr>
<td>Graham Conway</td>
<td>Alphabet (GB)</td>
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<tr>
<td>Graham Prince</td>
<td>Neva Consultants</td>
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<tr>
<td>Jane Pocock</td>
<td>Vansdirect</td>
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<tr>
<td>Martin Brown</td>
<td>Fleet Alliance</td>
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<tr>
<td>Mike Thompson</td>
<td>LeasePlan UK</td>
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<tr>
<td>Nigel Brain</td>
<td>Leasing Options</td>
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<tr>
<td>Paul Parkinson</td>
<td>Synergy Automotive</td>
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<tr>
<td>Rod Lloyd</td>
<td>Low Cost Vans</td>
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<tr>
<td>Stephen Greenstreet</td>
<td>Greenfleets</td>
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<tr>
<td>Steve Cocks</td>
<td>Lex Vehicle Leasing</td>
</tr>
<tr>
<td>Todd Williams</td>
<td>Arval UK</td>
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<tr>
<td>Vince Pemberton</td>
<td>Rivervale Cars</td>
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</tbody>
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The Leasing Broker Committee’s key focus during 2018 has been to further enhance the inspection programme to make it more robust and to develop a broader range of accessible learning opportunities to support compliance and the delivery of high standards.

The committee supported the development of two additional e-learning packages tailored for leasing brokers, each incorporating ten new modules. There has also been an increase in the delivery of regional engagement with the wider leasing broker community by hosting a series of regular Leasing Broker Forums across the country. The first being held in Lancashire.

Practical advice has also been given by the committee to inform and direct the association’s consumer communications related to the transition to WLTP testing. The feedback received from the committee has resulted in updated resources to help members explain the changes clearly and succinctly to their customers. The committee has also been instrumental in reviewing the BVRLA Leasing Broker Code of Conduct.

5% growth in members’ leasing contracts in first half of 2018

61% of new contracts in first half of 2018 were PCH

Get involved...

This committee meets quarterly in Amersham. To express an interest in taking part, contact amanpreet@bvrla.co.uk.

40 leasing brokers joined the BVRLA in 2018
Leasing & Fleet Management Committee

The Leasing & Fleet Management Committee consists of member representatives from a cross-section of large and small organisations who own or manage leased vehicles.

73% of leasing members say that BVRLA membership provides good value for money.

- **Ian Tilbrook**
  Committee Chairman and Fleet Director, Volkswagen Financial Services UK

Committee Members:

- David Cooper
- Graham Hale
- Guy Mason
- Joel Lund
- Lesley Slater
- Mark Connor
- Matthew Rumble
- Neal Francis
- Paul Gilshan
- Paul Walters
- Peter Cakebread
- Philip Newton
- Simon Carr
- Tim Laver

- Arnold Clark
- SG Fleet
- Lex Autolease
- Arval
- LeasePlan UK
- Zenith
- Inchcape Fleet Solutions
- Pendragon Vehicle Management
- Tusker
- JCT600 Vehicle Leasing Solutions
- Marshall Leasing
- Windsor Vehicle Leasing
- Alphabet GB
- ALD Automotive

The Leasing & Fleet Management Committee has been primarily concentrating on two key policy areas that are having a big influence on the sector: air quality and taxation.

Particular attention for the committee has been given to the issue of WLTP and its impact on the sector as well as the future of the company car. The committee offered invaluable feedback on the everyday challenges beginning to emerge, particularly for customers due to delays caused by WLTP. Committee members also provided important insights to support the formulation of the association’s key asks to the Chancellor on the topic of company car tax and WLTP.

The growing number of Clean Air Zones being implemented across the UK has been another area of significant interest for the committee. The association’s engagement work on the topic with stakeholders and government has been greatly supported by the committee’s views and input. Other priority areas have included agreeing an approach in response to the Financial Conduct Authority’s Motor Finance Review.

- 87% of car fleets are Euro 6 compliant
- 10% How much cleaner new cars registered by BVRLA leasing members are than the UK average

Get involved...
This committee meets quarterly in Amersham. To express an interest in taking part, contact amanpreet@bvrla.co.uk.
Rental Committee

The Rental Committee consists of member representatives from a cross-section of large and small organisations operating in the vehicle rental and car club sectors.

BVRLA’s motor insurance lobbying was a big success and will save many operators from the risk of closure.

The Rental Committee has been working on issues relating to the reputation of the sector over the last year, including closely monitoring complaint and audit trends and developing guidance and training solutions to help raise industry standards.

The committee has also been instrumental in reviewing the BVRLA Rental Code of Conduct, supporting the development of guidance for the wider membership to support compliance both with the Code and regulatory requirements affecting the sector, such as the new General Data Protection Regulation.

Other areas of work have included discussion on how to increase engagement with the wider membership, and the committee has been instrumental in helping to ensure that the voice of the sector has been heard by government officials developing policy to mitigate the risk of rental vehicles being used as weapons in acts of terror.

Committee Members:

Margaret Speirs
Committee Chairman and Operations Manager, Arnold Clark Car & Van Rental

Ben Lawson
Enterprise Rent-A-Car

Linda Malliff
Thrifty Car Rental

Louisa Bell
Avis Budget Group

Nicole Strathdee
Hertz Rent a Car

Philip Spain
Alley Cat Car and Van Rentals

Robert Shaw
Europcar

Scott Jenkins
Autohorn

Simon Grime
Miles and Miles

Tim Vettes
Sixt Rent a Car

94% of BVRLA members’ car rental fleet is CAZ-compliant

56% of BVRLA members’ van rental fleet is Euro VI-compliant, compared to 13% UK average

Get involved...
This committee meets quarterly in Amersham. To express an interest in taking part, contact amanpreet@bvrla.co.uk.

47 rental firms joined the BVRLA in 2018
### Membership Directory

#### Rental Broker Members
Companies who are acting as an intermediary in the rental of vehicles

- Assured Vehicle Rental Ltd
- Auto International Car Rental Ltd
- CarTrawler
- Compello
- Flexible Car Hire.com Ltd
- Fourways Vehicle Solutions Ltd
- Nexus Vehicle Rental
- Yello Car Hire Ltd

#### Associate Members
Companies who supply products or services to our industry

- ABN Amro Lease N.V., UK Branch
- ADESA
- All Fleet Services Ltd
- All Star Business Solutions Ltd
- American Car Rental Association
- APQ Global Research Ltd
- Arthur J. Gallagher Insurance Brokers
- Association of Car Rental Industry System Standards
- Assured Group Ltd
- Aston Barclay Ltd
- ATS Euromaster Ltd
- Audi UK
- Australian Fleet Lessors Association
- Auto Trader Ltd
- Auto Windscreens
- Autoclean Ltd
- Autodata Ltd
- Autofutura Ltd
- autrupt Ltd
- Barclays Corporate
- BCA Marketplace Plc
- Beijing Leasing Association
- Black Horse Fleet Finance
- Blake Morgan
- BMW (UK) Ltd
- BYNX Europe Ltd
- cap hpi
- Casara
- CD Auction Group Ltd
- ChipAway International
- Clifford Thanes Ltd
- Clydesdale Bank Plc
- Compliancy Services Ltd
- Consumer Credit Advisory Services (CCAS)
- Consumer Credit Trade Association
- ContractHireAndLeasing.com
- Copart UK Ltd
- Corporate Insurance Partners (CIP)
- Cox Automotive UK
- Creative Clarity Ltd
- Dekra Automotive
- DMN Logistics Ltd
- Drive Software Solutions Ltd
- Ebben-Oacs Ltd
- Epyx Ltd
- Experian Ltd
- Fiat Chrysler Automobiles UK
- Finance & Leasing Association
- FMG
- Ford Motor Company Ltd
- Freight Transportation Association
- Gain Solutions Ltd
- Geotab GmbH
- Glass’s Information Services
- GMG Asset Valuation Ltd
- Grant Thornton UK LLP
- Groomer Training Services Ltd
- GTG Training Ltd
- Hill Dickinson LLP
- Honda UK
- Hudson Kapel Ltd
- Hyundai Motor UK Ltd
- I247 Group
- Inchcape Retail Ltd
- International Decision Systems Ltd
- Investec Asset Finance plc
- Inviros EMEA LLP
- Issuo Truck (UK) Ltd
- IT Fleet Automotive Ltd
- Invco Ltd
- Jaama Ltd
- Jaguar Land Rover
- Jiepsof
- JPC Asset Management Ltd
- Keef Resources Ltd
- Kia Motors (UK) Ltd
- Kwik-Fit Fleet
- Legate Group Ltd
- LexisNexis Risk Solutions Ltd
- LHE Finance Ltd
- Licence Check Ltd
- Lloyds Bank
- Locke Lord (UK) LLP
- Lombard Corporate Finance
- Macquarie Corporate and Asset Finance
- Man Truck & Bus UK Ltd
- Maserati (GB)
- Masternaut Ltd
- Mercedes-Benz UK Ltd
- Mervyn Motor Auctions
- Michelle Tyns Plc
- Morton Fraser
- Motorcycle Industry Association Ltd
- MS Automotive (London) Ltd
- Nissan Motor (GB) Ltd
- Northbridge Finance
- Pexen Group Ltd
- PIM Group Ltd
- POC Point Ltd
- Premia Solutions Ltd
- PricewaterhouseCoopers
- Professional Inspirations Ltd
- Prohine Software Systems Ltd
- PSA Group
- Renault UK Ltd
- Retail Motor Industry Federation
- Ridecell, Inc
- Rival Insurance Services Ltd
- SAFO EUROPE
- Seat UK
- Sentinel Insurance Solutions Ltd
- Shoosmiths LLP
- Shoreham Vehicle Auctions
- Skoda
- SMH Fleet Solutions Ltd
- Society of Motor Manufacturers & Traders Ltd
- Suzuki GB Plc
- Symmetrics Solutions Ltd
- The AA
- The Miles Consultancy
- TomTom Telematics B.V.
- Towergate Insurance
- Toyota (GB) Plc
- Tracker Network (UK) Ltd
- Trak (Global Solutions) Ltd
- Trakmart Ltd
- V Group International
- Vale Fleet Solutions
- Vehicle Leasing Association of Ireland
- Vodafone Automotive UK Ltd
- Volkswagen (UK) Ltd
- Volvo Car UK Ltd
- Wagonex Ltd
- White Clarke Group Ltd
- WSP UK Ltd