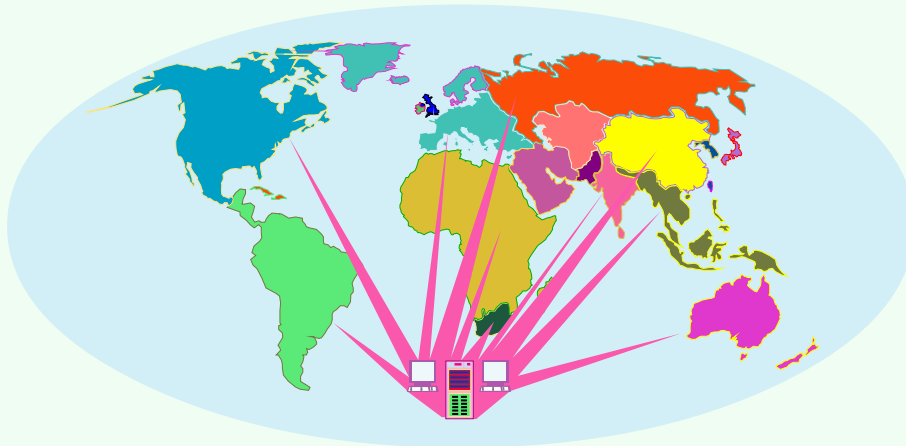


## Contents List and Prices



# International Dealer Systems Providers Initial Review February 2007

Compiled and Published by



Woods & Seaton Research



# International Dealer Systems Providers

Initial Review - February 2007

## Preface

### □ Reasons for this Analysis

Until now, our Analyses have concentrated on Europe and North America, with some references to other parts of the world.

But the business is changing, and three forces are making it necessary to consider the "Global" position in more detail...

### ① OEM desire for Global Standardisation

Some OEMs with a Brand which is recognised in virtually all countries, are already working towards Global Standardisation of other aspects of their businesses, ranging from...

- Vehicle floor plans...  
to...
- Dealer Processes for Sales and After-Sales.

The desire for Global Standardisation is a driving force behind some OEM Dealer Systems projects, and their increasing interest in Dealer System Providers (DSPs) which can deliver the same type of system in all countries, configured for their standard processes.

### ② DSPs aiming to be "Global"

Several DSPs are aiming to become Global in their coverage, for two main reasons...

- ① In response to OEM desire for Global Standardisation
- ② Their desire to emulate "MacDonalds" and cover the Globe to maximise revenues and profits.

To-date, there are relatively few examples of Dealer Systems which are operating in more than one Continent, and none (as far as we know) which are operational in all Continents.

- The AXIS GDS of Volvo Truck, and ADP-Kerridge *Autoline*, are two very different examples of DMS which are leading the way in operating in more than one Continent.

Most of those covered in this Analysis are DMS providers. But a few "Specialists" are also covered.

### ③ Groups aiming to be "Global" - or at least Multi-Continental

Although not yet as strong an influence on systems standardisation as OEM "globalisation", several Automotive Groups are also operating in more than one Continent.

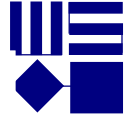
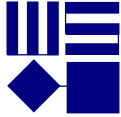
### □ The struggle between "horizontal" Groups and "vertical" OEMs

The extent to which standardisation of Dealer Systems can be achieved depends partly on the relative strengths of the OEMs which have "vertical" integration objectives, and Dealers, especially the larger Groups, which also have "horizontal" objectives.

### □ Only the beginning ...

This is only the first of a series of Analyses which will be needed to cover the...

- Developments in the positions of multi-Brand Groups
- Relative strengths of OEMs and Dealers in deciding "systems issues"
- Continuing evolution of DSPs towards global operation.

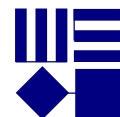


# International Dealer Systems Providers

## Initial Review February 2007

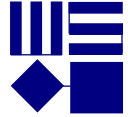
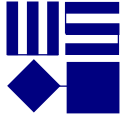
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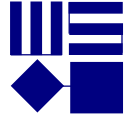
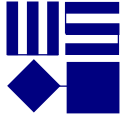
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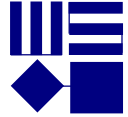
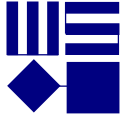
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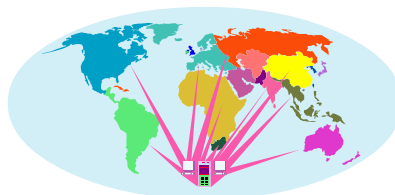
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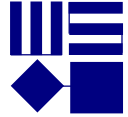
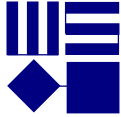
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