

## European Developments & Trends - 2006

This year, four volumes cover the European market

Volume 1 - June - Market, OEMs, DMS Providers

Volume 2 - April - Dealers & Groups

Volume 3 - July - Specialist DSPs

January - Systems in the on-line Parts Market

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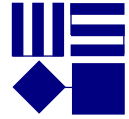
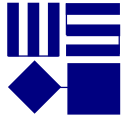


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## European Developments & Trends - 2006

### Four analyses for 2006

#### □ A clearer picture of Europe is emerging

The European markets\* are developing quickly now, and the situation in each of them is becoming clearer than it was two years ago when we published the January 2004 edition of *Developments & Trends - Europe*.

\* *Note: there is still no single European automotive market; each country has individual characteristics which are not expected to go away quickly - if ever.*

#### □ There are many developments to cover in 2006... including for Parts...

Because **Parts** are such an important contributor to OEM and Dealer profits, and the *Internet* is at last becoming significant in facilitating on-line trading, in January we delivered...

□ *The on-line Parts Market in Europe*... an Analysis covering the wide variety of business situations and systems of OEMs, Dealer Associations, DSPs and **Independent Parts Distributors\***.

\* *Note:* Although we usually concentrate on the Authorised sector, the BER aimed to provide more opportunity for Independent Parts and Service organisations to compete with Authorised Dealers.

The Independent sector has some excellent business processes and systems which were covered in our February 2005 Analysis...

#### *IT in the European Independent Automotive Aftermarket*

Our main coverage in 2006 is...

#### □ Three Analyses of the Authorised Dealer market...

As the first three Analyses in our March 2006 - February 2007 Subscription Year, we are providing...

□ *European Developments & Trends 2006 - Volume 1 - The Market* ... covering the positions of automakers, DSPs (Dealer Systems Providers) and products. This was delivered in June.

□ *European Developments & Trends 2006 - Volume 2 - Dealers & Groups* ... more indications of the ways in which the market is developing at the Dealer level. This was delivered in April.

- This Analysis expands on the content of *Dealers & Groups - Organisation and IT - April '05*, and shows how the Brand and country have a significant impact on Dealer systems strategies.

□ *European Developments & Trends 2006 - Volume 3 - The growing array of Specialist DSPs.*

Altogether, Europe is a fascinating and complex set of markets. Some of its characteristics are similar to those of North America, but others are very different.

- However, North America should not believe that innovation in automotive systems and services only happens there. Europe may not publicise its advances so prominently, but in several areas it is ahead of North America in its development and use of systems in automotive distribution.

**The Contents lists and Prices for these 4 Analyses are in the following pages.**

#### □ Some other aspects of Europe were covered in 2005...

At the beginning of 2005, the positions of the OEMs, DSPs and Dealers had not changed enough after the European Union's 1400/2002 Block Exemption Regulation (BER), to make a new edition of our usually annual *Developments & Trends* necessary.

Instead, we concentrated on four aspects of the market which were of strong interest to our Subscribers...

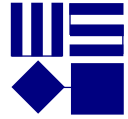
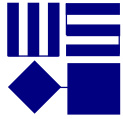
① *Dealers & Groups - Organisation and IT - April '05* ... covering the real trends at the "front line".

- We consider this to be one of the more useful Analyses we have produced, because of the trends which it identified, and their potential impact on future strategies, especially for the automakers.

② *Dealer IT Costs - April '05* ... to assess the variety of cost levels for different categories of Dealers.

③ *Standards for Dealer IT - June '05* ... a review of the progress to-date in planning common IT standards at the Dealer systems level in Europe - potentially similar to the STAR activity in the USA.

④ *Dealer System Providers in Car and Truck Makers' Networks - July 2005* ... to show the extent of multi-DSP penetration in each Network.



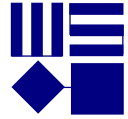
Contents lists for our four 2006 Analyses of Europe are in the following pages, with Prices on page 29.

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### Market, OEMs, DMS Providers

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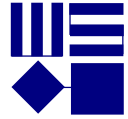
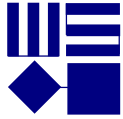
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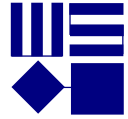
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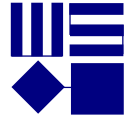
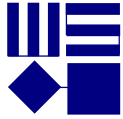
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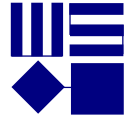
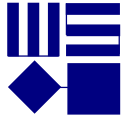
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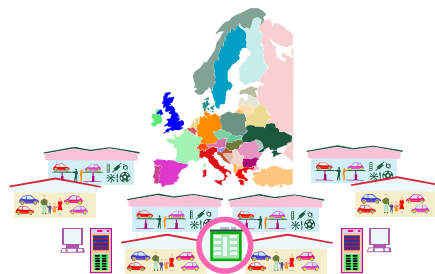
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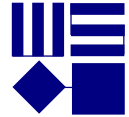
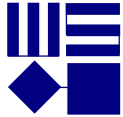
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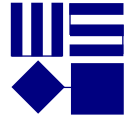
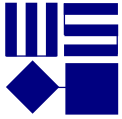


## European Developments & Trends - Volume 2 - April 2006

### Dealers and Groups

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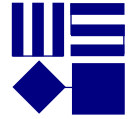
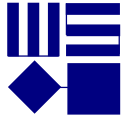
### Locations of Dealers & Groups reviewed in this Analysis and in the previous three years

- Reviewed in this Edition
- Reviewed in 2005 Edition
- Reviewed in 2004 Edition
- Reviewed in 2003 Edition



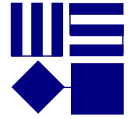
Combined with information from other sources, the Dealers & Groups shown above provide a useful overview of the direction of IT strategy developments in automakers' Networks.

Automaker control of the types of DMS used in their Networks appears to be still reducing, but their requirements for integration to satisfy "Standards" is increasing.



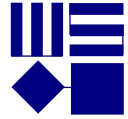
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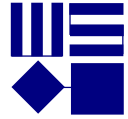
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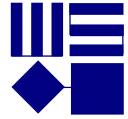
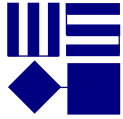


## European Developments & Trends - Volume 3 - Summer 2006

### The growing array of Specialist DSPs

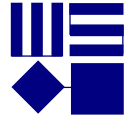
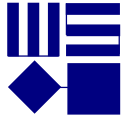
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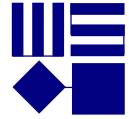
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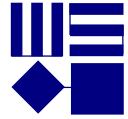
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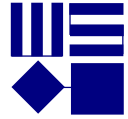
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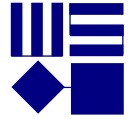
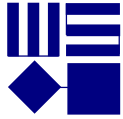
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## European Developments & Trends

### The on-Line Parts Market - January 2006

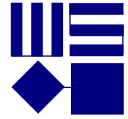
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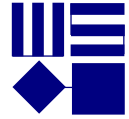
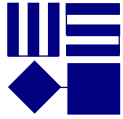
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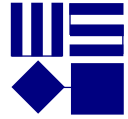
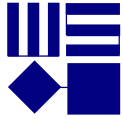
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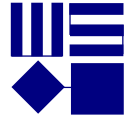
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