

PART III – Appendix 14: Commercial Vehicles

A. Description

The Commission was aware that there are certain differences between passenger and commercial vehicles and wanted a more accurate picture of these two categories so that these differences could be taken into account, if necessary, in any new legislative regime.

B. Classification of commercial vehicles

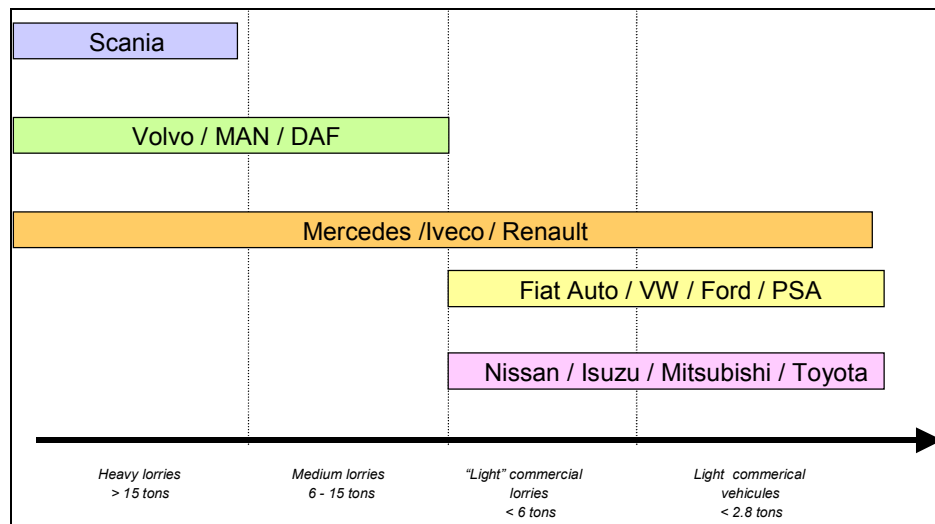
Commercial vehicles may be classified in a number of ways including by the eight official classes²⁶¹ or by the attributes of the vehicles²⁶². In this study, segmentation based on the distribution channels of vehicles is used²⁶³ and the weight of the vehicles is also taken into account. Hence, the market is structured around the following elements²⁶⁴:

Major Categories	Gross Vehicle Weight	Distribution Channel	WE Production		Growth (2000)
Light commercial vehicles	2.8 T - 5.99 T	Use same distribution channel as normal passengers cars	2.1 million	82.00%	8.00%
Medium commercial vehicles	6T - 14.99T	Separate distribution channel			
Heavy lorries*	>15T			18.00%	

In addition to these three categories based on the weight, buses and coaches are considered as an independent category.

C. Position of the players in the different markets

Analysis of the position of the players reveals the following:



²⁶¹ Eight classes of vehicles are officially listed (<2t, 2t-4t, 4t-6t, 6t-8t, 8t-10t, 10t-12t, 12t-15, >16t).

²⁶² For example, within heavy lorries, the following categories are most significant (each has a specific market):

- Distribution lorries (medium distance transport);
- Tractor units (long haul operations);
- Construction lorries (construction market).

In addition, buses and coaches should not be considered on the basis of their weight but more on the basis of the number of passengers they can transport.

²⁶³ See Point E below that explains the organisation of distribution.

²⁶⁴ Source: Andersen Analysis.

D. Characteristics of the commercial vehicle market

The main characteristics of the commercial vehicle market are as follows:

The commercial vehicle market is a 'Business-to-Business' market:

Customers are professional users who have specific servicing requirements that are related to the intensive use of the vehicles. The following issues are important to note:

- Sales people often need a technical/engineering background which results in a high cost of sales;
- The vehicles are often used for long distance journeys both within a country and on an international basis;
- Off-road vehicles are a key issue;
- Productivity issues lead to continuous use of commercial vehicles;
- Specialised requirements lead to a high degree of customisation;
- Lorries, bus and coach operators mainly buy 'all-inclusive' solutions consisting of several service-related products such as agreements on a fixed price per kilometre, extensive warranties, maintenance and repair contracts or round-the-clock assistance;
- The second-hand market is important;
- Customers in some segments have their own maintenance workshops.

Product and technological development:

The technical complexity of the product is significant.

- Products are defined by two components: the vehicle itself and the bodies the customer needs to carry on his business;
- The complexity of the product leads to complexity of servicing;
- On-board computers are being aggressively developed;
- Environmental considerations and safety requirements are essential issues.

E. Distribution and after-sales organisation

Distribution of commercial vehicles can be characterised as follows:

- **Light commercial vehicles**

Manufacturers generally use the same distribution channel for light commercial vehicles as they use for normal passenger cars²⁶⁵. To this extent, the value chain is the same for both. Not all dealers distribute light commercial vehicles since main dealers often act as specialised centres for this type of vehicle. Consolidation among the dealers is ongoing.

- **Medium and heavy commercial vehicles**

Manufacturers have a separate channel for distributing products in these segments. Dealerships in such segments have much lower territorial density and have the following characteristics:

- Dealers do not have a showroom, but usually have only an office and a repair centre;
- They have special equipment for lorry repair;
- The repair area is much larger and is determined according to the size of the lorry.

Distribution practices in this segment might differ from player to player. For example, some manufacturers favour an integrated²⁶⁶ distribution network while others build working relationships with authorised independent dealers.

- **Bus and coach**

Since conditions in the bus and coach market have evolved significantly (due to deregulation of public transport and consolidation of bus players), the organisation of the distribution process for such vehicles is often independent of that for lorries and is mainly ensured through direct sales by the vehicle manufacturer.

F. Position of the players

Three types of players have been interviewed here:

- Commercial vehicle manufacturers;
- Official dealers;
- Customers.

Views on several issues are unanimous. The sector seems to have taken up a common position. The most critical legislative variables on which there are clear-cut positions are:

- Exclusive and selective distribution;
- The link between sales and after-sales servicing;
- Access to information;
- Original spare parts;
- Multi-branding;
- The method of dealer remuneration and pricing policy;
- The system of allocating vehicles to distributors.

²⁶⁵ Except Iveco.

²⁶⁶ Commercial vehicle manufacturers justify this integration based on financial grounds/profit reasons especially in service-related operations. This information has been gathered during the qualitative interviews. For some manufacturers this integration involves up to 50 % of their network.

F.1 Exclusive, selective distribution:

All the manufacturers (even those who are distributing vehicles through a network of independent dealers) are willing to protect the high levels of investment²⁶⁷ made by dealers.

All the players consulted favour a selective and exclusive distribution system that protects the high initial investments of the dealers and that guarantees sufficient access to distribution and service networks and maximum professionalism in a 'Business to Business' environment.

F.2 Sales/after-sales link:

Due to the negative impact on profit of a vehicle being off the road, customers place great emphasis on vehicle utilisation. For these financial reasons, users expect an outstanding level of quality, reliability and geographical coverage of after-sales servicing. Therefore, any manufacturer willing to offer heavy commercial vehicles for long haul operations needs to have a European network with assistance and repair operations in many countries.

All dealers are contractually compelled to develop repair services. In addition, some authorised repair workshops may operate without being compelled to develop sales activities. For example, the Iveco network in Italy has 67 dealerships that control and certify more than 750 independent service points. It is obvious that every manufacturer's strategy in this field will have different characteristics and that their selection criteria will differ.

The compulsory link between sales and after-sales servicing together with the possible certification of authorised repairers are guarantees for commercial vehicle users. Such an arrangement contributes to the density of the network, which is necessary to rapidly perform all types of maintenance and repair jobs regardless of the vehicle's location.

F.3 Access to technical information:

It is extremely important for independent repairers carrying out fleet maintenance work on commercial vehicles to have access to technical information. Other information and more complex diagnostic equipment are less important to them because they usually do nothing but maintenance.

F.4 Spare parts:

The arguments of commercial vehicle manufacturers are similar to those of their counterparts in passenger cars. For reasons of safety, reliability and protection of the environment, commercial vehicles must be repaired with original spare parts or parts of matching quality. The intensive usage of the vehicles and the requirements for outstanding performance tend to reinforce this need.

F.5 Multi-branding:

Although there are relatively few brands of commercial vehicle on the market and although their identities are very strong, **commercial vehicle manufacturers** are opposed to dealers selling different brands in the same area. Reasons for rejecting multi-branding differ and appear to depend on the market segment the product occupies. These reasons are:

- For light commercial vehicles the reason is quite similar to that given for passenger cars - the risk of the distributor promoting models/brands on which they can expect a larger profit margin.
- For medium and heavy lorries as well as for buses and coaches, commercial vehicle manufacturers argue that it is a 'business-to-business' market where a dealer needs a specially trained and experienced sales force with in-depth technical knowledge of the highly customised products. The multi-branding concept should be rejected due to the complexity of the product and hence the need to concentrate on one brand.

²⁶⁷ Depending on the brand concerned, investments can be between 2 and 4 million € of which about 30% is not recoverable on a change of brand by the dealership.

From a commercial vehicle manufacturer's perspective, multi-branding should be allowed only when the manufacturer does not have a full range of products. In such a context, the manufacturer would not object to distributors selling commercial vehicles or bodies from other manufacturers that are not available within his own product range.

Likewise, all the **official distributors** agree that the existing restrictions on multi-branding should be maintained, except where the manufacturer does not have a full presence in every product segment. In addition, they argue that lorry operators are not in favour of multi-branding. As the latter generally have a strong opinion on commercial vehicle brands, they know exactly what they want in terms of the product. Discussion is tightly focused on price and on the reliability of servicing.

Commercial vehicle users do not consider multi-branding to be a significant issue.

They do not see any major advantage of multi-branding for the following reasons:

- Their technical knowledge of the products is even better than that of the dealer;
- Brand loyalty and recognition are very high;
- Depending on the type of commercial vehicle, they only have five to six manufacturers to choose from. Their choice is limited.

F.6 The method of dealer remuneration and pricing policy:

Independent official dealers freely determine the selling price, taking into account the suggested retail price of the product and the manufacturer's discounts. Discounts are given on the basis of volumes purchased and customer loyalty. Fixed remuneration is therefore ruled out.

Distribution networks owned by commercial vehicle manufacturers have relatively little flexibility in setting prices. The manufacturer negotiates the price to the final customer directly.

Sales targets are defined by the manufacturer and must be reached if official dealers are to receive the manufacturer's bonus.

Discounts are high in the commercial vehicle sector. Depending of the product and on the brand, they can range between 20 and 30%. Official distributors are in favour of maintaining a manufacturer recommended price.

Commercial vehicle users are fully aware of the exact price of vehicles. Users maintain that whenever the suggested retail price seems too high, there is a clear trend toward an overall discussion of prices including pre-paid maintenance and repair agreements (the 'zero cost after-sale' concept).

F.7 The system of vehicle allocation to dealers:

With light commercial vehicles, allocation to distributors is based on a schedule determined by them. They are not required to hold stock and the display of vehicles in a showroom depends on the dealer's assessment of market trends and other specific needs.

Heavy lorries as well as buses and coaches are supplied on a made-to-order basis that often leads to long delivery times²⁶⁸ for commercial users. The latter argue that this is not an issue since they are able to manage capacity.

²⁶⁸ For heavy lorries, the delivery time can sometimes be up to three years.

G. Conclusion and major issues

To conclude, the following comments were made during discussions on the impact of the various legislative scenarios defined by the Commission:

- The impact of the legislative scenarios on the distribution of heavy lorries and buses would be limited (for technical reasons, because of the high customisation of the product and because of the professional needs of the users). However, **the impact of the scenarios on the light and medium vehicle segments would be more significant** because:
 - Selectivity is important for vehicle safety on the one hand and for the professionalism of the sales and after-sales processes on the other;
 - Giving up territoriality would surely lead manufacturers to tighten their control over dealerships.
 - Multi-branding may sustain the financial viability of a dealership that does not offer a full range of products. However, multi-branding would remain limited due to the specific requirements of professional users.
- Traditional players as well as users agree **that the present situation of selective and exclusive distribution should be maintained.**
- All players would favour **implementing the General Regulation 2790/1999 for commercial vehicles if the new legislative regime for automobile distribution was to relax the regulation on issues like territorial exclusivity, selectivity and/or the link between sales and after-sales servicing.** However, this general regulation would have major effects such as:
 - The weakening of the financial position of distributors given that the contracts tying them to manufacturers would be for no more than 5 years and that 30% of their investment would not be recoverable;
 - A review of the possibility for manufacturers to impose sales targets on dealers;
 - The absence of any guarantee of access to technical information for independent repairers.
- Due to the specific nature of the commercial vehicle market, **new entrants – except in after-sales – would have little room for developing alternative and coherent business models.**

The **difficulty of differentiating between the two types of vehicle** (light on the one hand, medium/heavy on the other) also has practical aspects. This is especially true for players that offer all types of vehicles and do their best to exploit distribution synergies. They would be bound by two regulatory frameworks within one dealership.

Appendix 15: Glossary of Terms and Abbreviations

Access to the trade:	Generally, Access to the trade' in after-sales servicing is the ability for players to enter the after-sales market. More particularly, the term is used in the analysis of the legislative variables where the possibility of creating a certification for independent repairers is studied.
ACEA:	Association of European Automobile Manufacturers (Association des constructeurs européens dans l'automobile)
After-sales competition:	The level of competition between players in the after-sales servicing market. This level is estimated in the study based on the after-sales market share of official dealers and other players as well as on the number of competitors per area.
Availability clauses:	Clause that states that within the European Community vehicle manufacturers must supply their dealers within their distribution networks with all types of vehicles upon a consumer's request, including corresponding models with specifications applicable to Member States other than those in which the vehicle is purchased.
Balancing (B) loop:	Causal loop that seeks to reach a level of equilibrium. If this loop is activated or de-activated, the system will reach a new equilibrium.
Brand exclusivity:	Obligation to sell and/or service only one brand of motor vehicle.
Brand-related market attractiveness:	Attractiveness of the brand-related distribution and service markets. This is one of the components (component C4) of the product loop (R1) and is detailed in Part II of the study.
CAGR:	Compound Annual Growth Rate
Causal loop:	A causal loop is a chain of cause and effect relationships between components that can either be a reinforcing loop or a balancing loop. The reference model developed by Andersen is built around four main causal loops (the product, customer, reliability and price loops).
Channel diversity:	The study introduces an alternative to the current situation where identical conditions exist for all players with regard to the method of remuneration and to selection criteria. The alternative option proposes to accommodate the co-existence of several sets of criteria. The manufacturer would have the opportunity or may be obliged to distribute vehicles via different channels such as virtual and physical ones; single brand and multi-brand ones; combined sales/after-sales ones and those specialising in sales or service.
Consumers:	Various groups of final users of vehicles as well as fleet buyers.
Contribution margin:	The difference between variable revenue and variable cost.

CRM:	Customer Relationship Management
Customer loop:	Causal loop (called B2) that illustrates how increased intra-brand competition stimulates market initiatives, differentiation among players and innovation in managing customer relationships.
Customer-tailored contact:	'Customer-tailored contact' is one of the four areas of customer satisfaction that is studied. It is a qualitative indicator used to assess the level of response to the specific needs of each category of consumer. It refers to the component (C9) of the customer loop (B2).
D:	Germany
Direct sales:	Direct sales by manufacturers refer to the possibility for a manufacturer to reserve the right to directly sell to certain customer categories. This issue is one of the 10 variables studied.
DM:	Data Monitor
DMS:	Dealer Management System
E:	Spain
EMEIA:	Europe, Middle-East, India, Africa
EU:	European Union (15 countries)
F:	France
Fast fit repair chains:	'Fast fit' repair chains are servicing outlets that are mainly specialised in simple maintenance and repair work.
First come, first served:	A system of vehicle allocation where vehicle stock must be managed at the European level in order to satisfy distributors' requests for vehicles in the order that they arrive. This system is proposed in the Terms of Reference defined by the Commission.
Fleet companies:	Players such as leasing and renting companies that are considered to be the customers of official dealers, that offer vehicle usage based on additional services (leasing, invoicing, fuel cards) and on a new concept ('Total Cost of Ownership').
Hub and Spoke organisation:	The 'Hub and Spoke' concept refers to numerous specialised repair outlets that are centred around a main dealer outlet.
I:	Italy
IAM:	Independent After-Market
Independent repairers:	Repair outlets that do not belong to the official network. These players are often referred to as 'traditional independent repairers' or 'mainstream' or 'generalist' independent repairers in order to distinguish them from new entrants in the after-sales servicing market that are more specialised.

Inter-brand competition:	The level of competition between groups of manufacturers. This level is estimated based on the number of brands and brands per car segment. It should be noted that estimation of the level of inter-brand competition in the study always refers to the European market as a whole.
Intermediaries:	Players that act on the sales market for new cars and that act on behalf of final consumers in whose name they purchase or collect a specified vehicle. The role of intermediaries is one of the ten legislative variables studied.
Intra-brand competition:	The level of competition between players in terms of products of the same brand. In the study, this level is based on the number of distribution channels with a significant (more than 5%) market share and on the number of competitors per area.
Lean distribution:	Lean distribution is a new concept for organising distribution processes and is currently being implemented by major manufacturers. Lean distribution works according to a 'pull' distribution method where customer demand drives production.
Legislative combinations:	'Legislative combinations' are combinations of scenarios and variables that were analysed in the study.
Legislative options:	Legislative options in the study refer to the potential legislative rules that could be set for each of the ten legislative variables studied.
Link between sales and after-sales link (sales/after-sales link):	In the present system, every official distributor is obliged to be an official repairer and vice-versa. This compulsory link between sales and after-sales servicing may be questioned. The Terms of Reference proposes a situation where the two businesses would be carried out separately and sales and servicing players would be selected according to different criteria. In addition, Andersen introduces an additional option, the reorganisation of the link. This option would entail obliging distributors who sell new cars to offer after-sales servicing although they would not be obliged to provide the service themselves. They may choose to have a partnership with one or more official repairers.
m.:	Millions
Manufacturers:	Manufacturers are vehicle producers and are the main player in the automobile industry.
Market integration:	Market integration is one of the four areas of competition that is studied. The degree of integration of European markets is measured by the level of pre-tax price differences between Member States.
Market outcome:	Market outcome refers to the situation that would come about on the market if certain scenarios and variables were to be realised. The study highlights three possible long-term (5 years) market outcomes for the sales and servicing market. These long-term developments are based on the speed of activation of each of the four loops.

Mass-distribution:	Mass-distribution refers to large retail players such as hypermarkets, supermarkets and car-supermarkets that might enter automobile distribution.
Mass-marketing:	The terms 'mass-marketing' and 'mass-sales' in the study are used to describe sales practices of would-be new entrants in the sales of new cars. The practices focus on volume sales of the 'best-selling' or standard models of cars with a standardised sales process. 'Mass-marketing' addresses a larger number of potential customers. This type of sale may be contrasted to the traditional sales process of official car dealers that is based on in-depth product knowledge and personalised customer relationships.
Mass-selling:	'Mass-selling' is one of the three market outcomes identified in the study. In such a situation, the concentration of players would increase, product ranges would shrink while sales and service processes would become more standardised.
Method of dealer remuneration:	The method of dealer remuneration is one of the ten legislative variables studied and refers to the various components of dealer remuneration by manufacturers.
Modelling Exercise:	All estimated figures that are provided in Part IV of the study (Market Outcomes) are based on four quantified 'Modelling Exercises' carried out by Andersen. These relate to 'dealers' profitability', 'market share', 'geographic coverage' and 'distribution costs' and are presented in Appendices 10 to 13.
Multi-branding:	Multi-branding refers to the practice of selling or maintaining products from different manufacturers concurrently and within the same environment and/or structure. In the present situation, manufacturers can impose certain conditions that limit multi-branding in sales (separate sales premises, separate management and separate legal entities and in such a manner that no confusion of brands is possible).
Multi-channel:	'Multi-channel' is one of the three market outcomes identified in the study. In this situation, distribution and service formats would be diversified and manufacturers would manage co-existing channels.
Multi-site:	Multi-site operations refer to sales or servicing players that operate several outlets in different locations.
Network Profitability:	The average profitability of traditional official dealers. This is one of the components (component C6) of the product loop (R1). This indicator is also analysed within the Modelling Exercise 1 (Appendix 10).
New entrants:	The term 'new entrant' or 'would-be new entrants' refers to players that are likely to (or willing to) enter either the sales or the servicing market. These players include for example new entrants such as fleet companies or fast fit repair chains that are already active on the market. The term also includes players such as Internet companies, Supermarkets, Car supermarkets, financial sector companies.

OEM:	<ul style="list-style-type: none"> (1) Original Equipment Manufacturer (2) Parts that are mounted at the assembly line, original assembly parts
Official networks, dealers and distributors:	'Dealers' and 'official networks' both refer to the current official dealers of automobile manufacturers. These players operate both sales and servicing operations. The term 'distributors' is also used in the study to refer more generally to players that operate within the business of selling new cars. Therefore, it should be noted that both dealers and distributors refer to the official dealers when the current situation is described. However, in the future, distributors may include other authorised players that are only active in sales.
Price loop:	This is a causal loop (called B4) that illustrates the potential temporary and/or structural effects of increased price competition.
Price:	'Price' is one of the four areas of customer satisfaction that is studied. It is estimated based on the price level of new vehicle sales and on the various after-sales service activities, price transparency and comparability bearing in mind the Euro and on-line price comparisons. Several components refer to 'price' in the reference model. These are the quality/price ratio (12); the average price to the final customer (C16) and the level of price competition (C19).
Product innovation:	'Product innovation' is one of the four areas of customer satisfaction that are studied. It is also a basic component (C1) of the product loop (R1). It is estimated based on the number of brands, models, customer segments and on the average length of time required to launch new products.
Product loop:	Causal loop (called R1) that points to the close working relationships between manufacturers and their official networks and the effect of these relationships and joint investments on innovation.
R.O.I.:	Return on investment. In the system-based analysis, ROI refers to the component C13 of the reliability loop (B3).
Reinforcing (R) loop:	Causal loop that has an exponential function when activated. It creates either a benevolent circle (in the case of a positive loop) or a vicious circle. Within the reference model, the product loop (R1) is the only reinforcing loop.
Reliability loop:	Causal loop (called B3) that shows how the profitability of the various after-sales activities tends to balance itself out, bringing satisfactory results in terms of the quality/price ratio and the geographical spread of the sales and service outlets.
Reliability:	'Reliability' is one of the four areas of customer satisfaction studied. It is a qualitative indicator used to assess the level of experience and reliability of the service players.
Scenario:	The term 'scenario' in the study always refers to the five legislative scenarios defined by the Commission in the Terms of Reference. The word 'sub-scenario' refers to variations of the five scenarios.

Selectivity:	Selectivity means that dealers are chosen using product-based qualitative and/or quantitative criteria defined and applied in a non-discriminatory manner by the manufacturer.
Spare parts manufacturers:	Makers of spare parts and diagnostic equipment.
Speed of activation:	This speed reflects the intensity of the relationships between the components of the loop (high, stable or low).
Status quo:	'Status quo' is one of the long-term market outcomes identified in the study. In such a situation, close relationships and integrated operations between manufacturers and their networks would remain.
System-based analysis:	The term 'system-based' in the study refers to an assessment that is conducted based on the reference model developed by Andersen.
T:	Tons
Territorial exclusivity:	Territorial exclusivity means that the manufacturer sells his goods exclusively to one distributor within a given territory, and therefore assigns a territory exclusively to one distributor
Total Cost of Ownership (TCO):	The direct and indirect costs incurred throughout the life of the vehicle.
UK:	United Kingdom
USA:	United States of America
Variable:	The term 'variable' refers to the ten legislative issues identified by the Commission in the Terms of Reference.
VAT:	Value Added Tax
VDA:	Verband der Automobilindustrie
veh.:	Vehicles
VM:	Vehicle Manufacturer
WE:	Western Europe

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	Type of actor	Car Manufacturers	Importers	Distributors	New entrants	Parts	Repair	Final users
Europe	Federations	ACEA		CECRA	Eurocommerce	CLEPA	CECRA	ECATRA
		JAMA (Eur.)		Euro-Commerce		CLEDIPA/Figiefa	AIRC	BEUC
				GACI Europe				IRU
								FIA/AIT
National								
- France	Federations	CCFA		CNPA		FIEV		
	Industry	PSA			AXA	Valeo	AutoDistribution	
		Renault			Soc. Générale		Norauto	
					Carrefour			
- Belgium	Federations		Febiac					
	Industry	Scania	D'leteren		Cardoen			
- UK	Federations	SMMT	SMMT	RMIF		SMMT		
	Industry				Virgin Cars			
					JamJar			
- Germany	Federations	VDA		VKW (H. Weis)		VDA	VKW (H. Weis)	
	Industry	DCX				Bosch		Sixt
		DCX						
		Ford Europe						
- Italy	Federations			SVI				
	Industry	Iveco						
		Fiat						
- The Netherlands	Federations			BOVAG			BOVAG	ANWB
	Industry	DAF Trucks			Autobytel			ABN-AMRO

Legend:	
	Specific commercial vehicle actors
	All other actors