

ICDP Spring Meeting 2010
Wednesday 24th – Thursday 25th March, NH Carlton Hotel, Amsterdam
Business models for a changing decade

ICDP's member meetings are a unique opportunity for senior managers from across the auto retailing and after-sales sectors to consider dedicated research results and debate their implications with peers in a closed environment. They are also an ideal occasion for informal networking and sharing of experiences.

Our Spring Meeting 2010 will address a number of critical issues around the theme of business models for a changing decade. With continued volatility across the car markets of Europe, and with a number of manufacturers struggling to sustain the viability of their dealer networks, how should the business models supporting car ownership and usage be reconfigured to meet the evolving competitive environment? We will examine developments both within and outside the traditional sales and service model, look at the broader picture of where the industry is heading, and extend our evaluation of the regulatory environment.

The Meeting will be held in Amsterdam, at the NH Carlton Hotel, situated next to the famous Flower Market in the historic heart of the city, and easily reached from Schiphol Airport. Amsterdam has excellent connections to all the major European airports and is served by both the low-cost and the traditional carriers.

Please complete and return your Booking Form to the Project Office to secure your place.

DRAFT AGENDA

Wednesday 24th March

- 5.00 p.m. **Recovery in the European car industry** Max Warburton
Senior Analyst,
Bernstein Research
- Presentation and discussion session
One of Europe's most respected automotive analysts, Max will give his assessment of the big picture of the European car industry as it struggles to shake off the effects of the recession
- 7.00 p.m. Cocktails hosted by BOVAG and RAI in the hotel's bar followed by
dinner at Restaurant Selecta

Thursday 25th March

8.45 a.m. **Changing approaches to car usage**

Introduction

Andrew Tongue

Fleet and business market issues

Thomas Chieux

The fleet and business car sector impacts new car sales, the aftermarket and also the operation of the used car market. In the opening stages of our current research into this topic, we shall examine the impact of the recession on purchase and usage patterns for fleet cars and present a framework for the analysis of channels providing car usage

Car Clubs: fad or threat?

Andrew Tongue

In a number of European markets, consumers now find themselves with a growing range of alternatives to traditional car ownership. From small-scale community-based beginnings, the so-called 'Car Clubs' are now growing rapidly as big business starts to get involved. How do these schemes work, and what will they mean for other players in the sector?

Discussion session on changing approaches to car usage

Coffee

Feedback from discussion session

Rethinking the model

The aftermarket: future shape and strategies

Thomas Chieux

In the latest stage of our research projecting the future size, shape, and value of the aftermarket, we shall focus on the strategic options for the key players in the service and repair market

**Building strategic alignment between
new car supply and margin systems**

Ben Waller

Following on from our benchmarking of the performance of new car margin and standards policies, and our assessment of how consistency and effectiveness might be improved, this presentation will explore the next piece in the strategic jigsaw, the role played by new car supply systems

12.45 p.m. Lunch

2.00 p.m.

Innovation in car retailing

John Whiteman

Panel discussion

ICDP's recent work has looked at the dynamics of the new car selling model, and at how it might be reconfigured for greater effectiveness and profitability. We shall summarise this research, and then invite a panel of industry experts to give their own perspectives on the possible paths for innovation in car retailing, and to share their experiences of driving change within their own organisations, in dialogue with delegates

Tea

Block Exemption update

Andrew Tongue

With the first part of the new European legal framework governing franchise agreements in sales, service, and parts distribution coming into force on 1st June, we will provide a timely update on the issues at stake and the emerging implications for different types of operator in the sector

Conclusions

John Whiteman

4.15 p.m.

Close of meeting

BOOKING FORM

PART ONE: Contact Details In order make a booking, please complete all parts of this form and fax it back to Jane Trace in the Project Office 00 44 1564 782 555, thank you.

Name			
Title			
Company			
Tel		Fax	
Email			
Special Dietary Requirements			
<i>If you do not wish your contact details to be passed onto another delegate, please tick the box</i>			
			<input type="checkbox"/>

PART TWO: Credit Card/Purchase Order Bookings will only be accepted with a Visa, MasterCard or American Express number and expiry date, or a company purchase order number. Cancellations will not be accepted after Friday 12th March 2010 (unless a straight forward swap with a colleague). The price is €475 per package. Check-out from the hotel is **12 noon** on the day of departure when all extras should be settled directly with the hotel.

Credit Card – OR - Purchase order No.			
Expiry Date		Visa/MasterCard/ American Express	
Name on Card			

PART THREE: Delegate Package €475 includes:

- All events on the 24th March
- Accommodation and breakfast at N H Carlton Hotel on 24th March
- Spring Meeting package on the 25th March

If you wish to be accompanied by your partner, please enter their details below and the Project Office will contact you to confirm the additional cost.

Name of Partner	
Special Dietary Requirements	