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1



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3. STAR and other Standards

A landmark achievement

In the past decade a significant change has been taking place in the franchised auto-dealer sector in North America.

There is now no question about “whether” open standards will exist between the systems of automakers and dealers.

They are here and being used extensively, although the main benefit is still ahead.

In the early '90s, AMDSG began its voluntary work on standards for dealer systems, generating a level of interest which led to the creation of the formally funded STAR organisation - *Standards for Technology in Automotive Retailing* - in 2000.

- Previous editions have reported on the progress of AMDSG and STAR, and the potential for dealers, automakers and vendors to gain benefit from their actions.

The complaints of some participants that progress is too slow, and that they have no return on their investment yet, have also been reported. The possibility has existed that some members would lose interest and reduce their investment in STAR.

Until this year it has not been easy to identify tangible benefits. Some projects were incomplete, and in others the effect of STAR was combined with other factors.

But a critical point has been passed, and it is absolutely clear that...

- Tangible benefits are being gained, although they are not always easily measurable.
- Most automakers, ranging from the largest to smallest, are using STAR standards.
- Some vendors, but not yet all, are reporting that they are helped by the standards.
- A very large majority of the market is committed to STAR.

3.1. Background to STAR

Standards in the wider automotive industry have been evolving for many years. The franchised auto-dealer sector was the last to accept that joint action was needed.

- Figure 3.1. outlines standards which exist in the Heavy Truck, Aftermarket and Collision Repair sectors, and in the automakers' supply chain.

Initially, AMDSG was seen by some in the franchised auto-dealer sector as a group of importers, plus NADA, working on a project which was of interest only to them.

Now, virtually all of the automakers are fully involved - with Chrysler, Ford and GM - who were very cautious initially - even taking the lead in some (but far from all) areas of development.

3.1.1. Different situations

Other automotive sectors - notably the Aftermarket - had strong reasons for working on standards. The participants needed to co-operate.

In the franchised auto-dealer sector, automakers saw each other as competitors, with “proprietary interfaces” sometimes considered an advantage.

Also, the “Big 3” DMS vendors had already developed most of the proprietary interfaces, and saw standards as easing the way for new competitors to enter their market.

But NADA's work on behalf of dealers and Groups - who are rarely willing individually to commit resources to develop standards - has been a key catalyst.

Figure 3.1. Automotive Standards - Where they fit into the overall market

The franchised auto-dealer sector is only a part of the automotive market.

The figure below outlines the **standards** which are becoming established in the USA, and the position of STAR in its sector.

The other sectors have been ahead in implementing standards.

- More Aftermarket details are included in *North American Automotive Aftermarket - May 2002*.

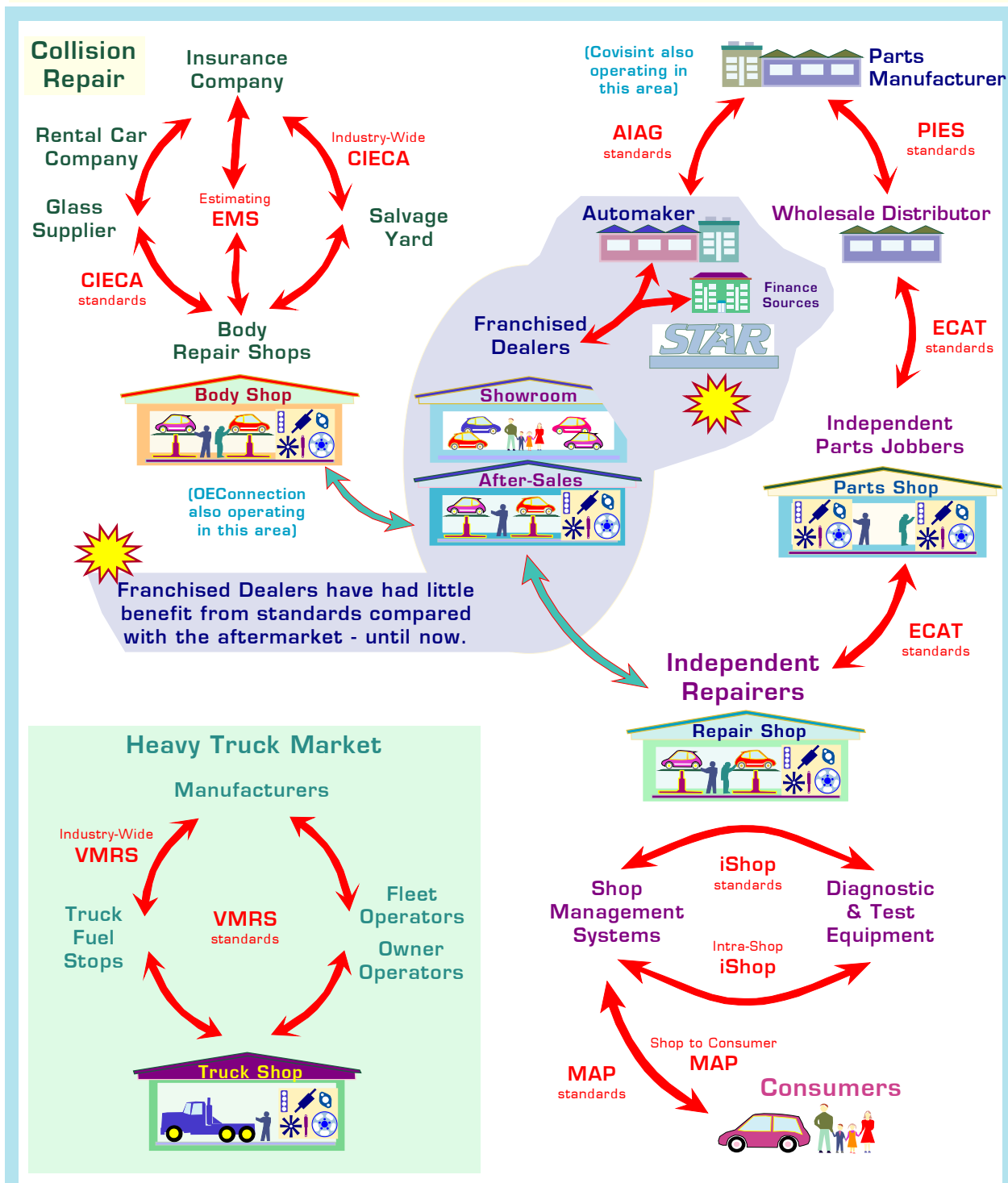
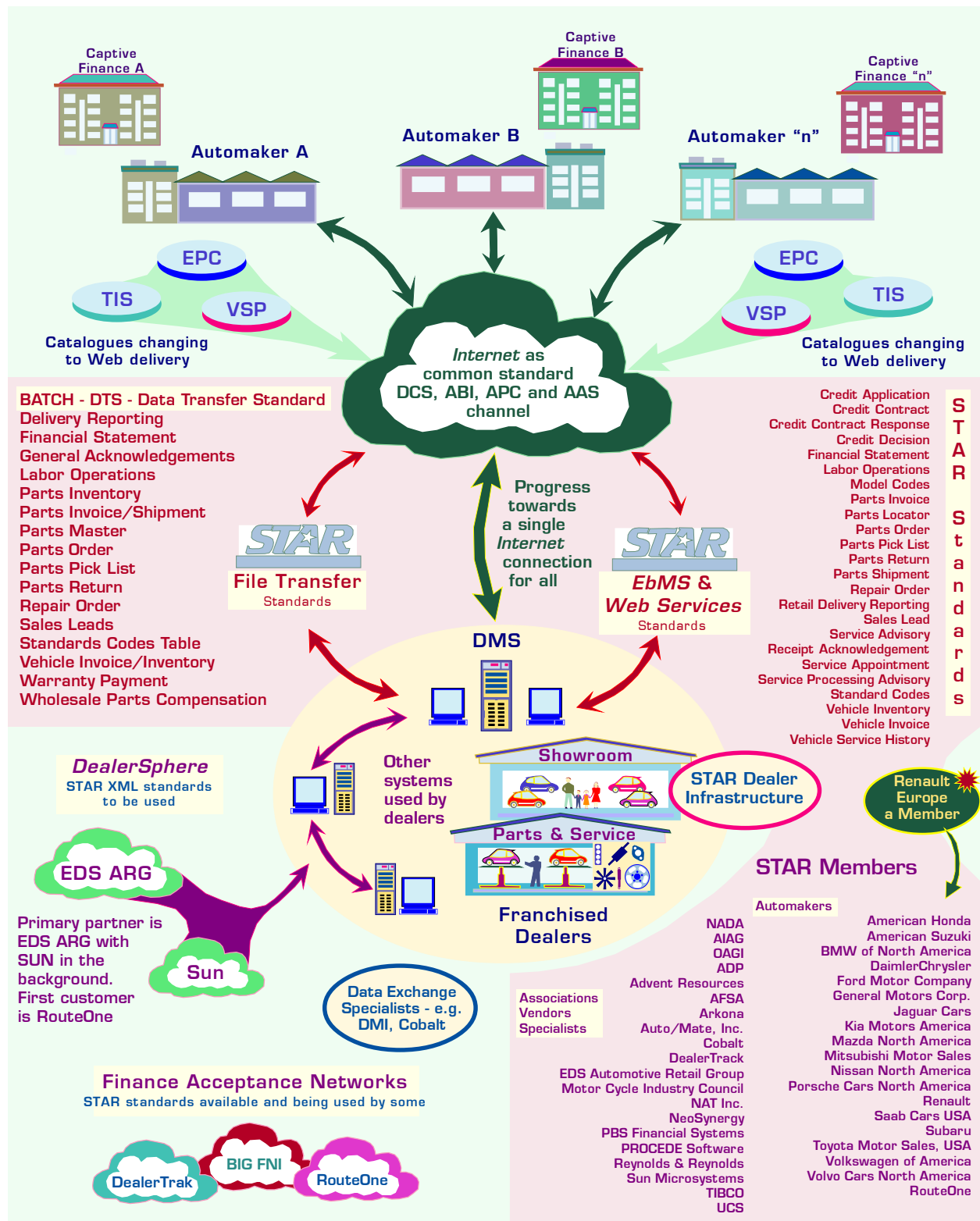




Figure 3.2. Standards emerging in the Franchised Automotive Sector

This figure shows (in red) the applications for which STAR has standards.
It also shows the other influences at work in the market, involving automakers and vendors.





3.1.2. Primary objective

Standards work started with the objective that each DCS application - e.g. a Parts Order or a Warranty Claim - should have the same "interface" for all automakers.

Vendors could then develop a single software interface for all, reducing costs and the time required.

The work has widened to include...

- Applications which did not exist in the early '90s - e.g. Web sales leads
- The infrastructure of dealer LAN-WAN
- The potential for all types of dealer communication to share a single IP connection
- The potential for interconnection of systems from different vendors.

The ultimate - visionary - objective is a wholly open dealer systems environment.

In some areas the benefits are proving to be wider than expected, including...

- Standards used internally by the automakers for exchanging data or linking systems in different departments.

3.1.3. Some constraints

The vision of "totally open" is not wholly achievable in the near future. Three of the constraints are...

- ① Major automakers have many long-standing internal systems which need re-development or adaptation.

Most are not re-writing the complete application, but using middleware.

- ② Automakers need to implement network infrastructures which can support *Internet* data communication.

Both ① and ② are significant investments and require commercial justification.

- ③ Major DMS vendors are not very interested in allowing open interconnection of the systems of specialist vendors.

- Their reasons are a combination of commercial and data security.

So in this area, "open" will develop slowly, and will need market pressure.

However, there has been...

3.2. A dramatic change

AMDSG's progress was slow because the members were working on a voluntary basis, in any time they could make available.

STAR has a \$0.7million annual budget from the contributions of automakers, vendors, NADA and various other members from associated businesses.

This has allowed it to generate - relatively quickly - a set of real-time standards to complement the "batch data transfer" standards developed by AMDSG.

The work has been done by a combination of continued voluntary investment of time by members, plus full-time staff and consultants for project management and drafting standards for members to review.

3.2.1. A toolset exists

The majority of tools needed for an open standards environment now exist for any automaker starting development of a new set of DCS applications. They include...

- **Data Dictionary**
- **DTS** - Data Transfer Standards - for batch *FTP*.
- **XML** - Real-time Standards.

The DTS and XML standards define the data content and format for each of the applications listed - see below.

- **XML Implementation Guidelines**
- **Dealer Infrastructure** Standards.

However, there are other issues which STAR has to resolve, especially the basic transport standard.

- There have been intense discussions about whether *EbMS* or *Web Services* should be the standard.

This has been resolved by adopting both of them, with members - primarily the automakers - able to choose which they will adopt.

- As reported in Section 4.4.7., VWNA has decided to offer both standards to vendors who wish to connect their DMS to its new Web-based DCS.

The first new or re-engineered DCS applications developed by automakers from the



late '90s used the DTS "batch" standards. Now the emphasis is almost totally on the XML standards.

3.2.2. Some Standards timing difficulties

Several automakers have needed to move to new DCS applications before the XML standards they needed were ready.

- Chrysler and Toyota were affected, and for some applications worked to the STAR "principles", not with the specific standards.

But for VWNA, starting in 2003 with its new applications, the standards exist.

3.2.3. Some automaker timing difficulties

Vendors often say that too few automakers have converted, and they must continue to support old applications as well as STAR.

- But especially Ford and GM have many old applications which they have not scheduled to renew for some time, and which require a major investment.

However, both have been implementing XML messaging solutions internally for a year, and GM expects to convert its DCS completely to STAR by 2006.

3.3. Standards available, and their users

Figure 3.2. lists the DTS and XML standards which are available.

More important is the list of members who are using them in their various stages of application development.

Section 4 reviews automaker strategies, including their involvement with STAR.

- In effect, virtually all are now using or have used STAR standards.

3.3.1. Two very different examples...

Kia - see Section 4.5.1. - obtained very fast response from the major vendors to its request of interfaces for its new DCS applications.

- 4 STAR standard applications were in operation 120 days after agreement to start.

Also - although not published - the costs appear to have been "acceptable to this relatively small automaker.

- This appears to represent a significant change in vendor ability to respond.

GM - see Section 4.4.3. - has a very much larger task, and will need 3 years to implement its commitment to STAR.

Note: GB is also using STAR standards as a convenient basis for data exchanges and system inter-connections between its own departments.

3.3.2. A uniform automaker response...

Visits to the automakers reviewed in Section 4 confirmed that they are using and are committed to STAR standards, within the constraints of timing of re-investment in DCS applications.

Adoption of the standards is wider...

3.3.3. Specialists using STAR

Both DealerTrack and RouteOne, which operate in the Finance Acceptance Network sector - see Section 10 - are both committed to STAR standards.

However, they are at different stages.

- DealerTrack became operational before the standards were available.
- RouteOne is expected to be operational by the end of 2003.

3.4. The vendors...

The smaller DMS vendor members of STAR are reporting that the standards are reducing their time and cost to develop interfaces for automakers.

A typical comment is...

- "When we had done one STAR DCS, the next was only a small amount of work. It is clear that wider use of STAR will make entry easier for new vendors.

The major vendors are so far much less positive about the effects - not only because new competitors are helped.

- They must pay to be members, and for their people to work in the Special Interest Groups (SIGs) which develop standards.
- They must maintain the array of old DCS interfaces, as well as develop their own new STAR interfaces.



Also, they state that automakers do not use the data in STAR standard formats in the same way, which has a significant impact on development costs.

- Unfortunately STAR cannot define the interpretations which automakers use for individual data fields, and for them to adopt a standard would involve major mainframe software changes.

Overall, the vendors say that STAR does not yet help their quarterly profit reports.

- But they must now see clearly that their market has adopted STAR, and their only logical option is to work with it.

3.5. The dealers

Most dealers are probably still only aware of STAR as a name "in the background".

They have been unwilling individually to be members of STAR, and depend on NADA to represent their interests.

- That is unfortunate, because the automakers have no first-hand dealer views about the way standards should work in the real point-of-sale environment.

Vendors offer some advice, but dealers and Groups need to be involved.

However, slowly, they should begin to see benefits from STAR - e.g. the Kia dealers who gained integration very quickly.

It will be a matter for negotiation between automakers, vendors and dealers, whether the future prices for interfaces will be lower than in the past.

3.6. Conclusions

STAR cannot hope to provide more than an effective (or practical) compromise.

But it is a major advance on the anarchy of proprietary interfaces. By 2006 it will have achieved an open platform, facilitating...

- Faster interface development.
- Lower costs of development.
- Increased sharing of facilities in multi-franchise dealer environments.
- Easier entry for new DMS and specialist vendors - e.g. for CRM, Showroom and Service applications.

- Lower interface costs for dealers - if vendors are persuaded to pass on some of their savings.

Most important, AMDSG and STAR have changed the market's orientation from...

- **proprietary interfaces with no interest in whether dealers can share equipment across franchises, to...**
- **standard interfaces to assist sharing of equipment wherever it is practical.**

3.7. Two other standards organisations

The 2002 edition reviewed *DealerSphere* and *CODA*, and a brief update follows.

Both plan to use STAR standards for their interfaces.

Both have yet to start live operation.

3.7.1. DealerSphere

This organisation was started by EDS ARG with Cobalt and SUN Microsystems.

Currently, EDS ARG is the project "driver" with SUN in a background role, and Cobalt no longer participating.

Its objective is to support real-time data exchanges between incompatible systems, using a central Server to match the different data sets.

The first customer is **RouteOne**, which will use *DealerSphere* as its standard interface to smaller DMS and specialist vendors. See also Sections 6.4. and 10.6.

3.7.2. CODA

This is a co-operative initiated by Ocentrix, a new DMS vendor - see Section 7.7.

Its 7 founder members are vendors who want open interfaces via which their systems can be integrated for use by dealers.

Members now total 12, including Promax and EDS ARG.

At present *CODA* is formulating the basis on which it will operate, and a first meeting has been held.

The objective is operate an *ASP* host delivering DMS and specialist applications which are integrated via open standards including *Web Services*.

See additional comment on STAR in Section 2.5.



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Automakers, Vendors, Standards, *ASP*

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