



## Quick reference to

# Woods & Seaton Analyses and *Briefings*

March 2009

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Starting at .pdf Page 2

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Starting at .pdf Page 50

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Mike Seaton  
Jo Whittingham

March 2009



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Subscription Year and full title	Short title
<b>March 2008 to February 2009 Subscription Year - Analyses supplied to Subscribers</b>	
1. International Dealer Systems Providers - SAP - Second Review - June 2008	Internat. 2008 SAP-2
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6. North American Developments & Trends - "Smaller" DMS Providers - Feb. 2009 Initial two reviews of DSPs and their major customers... • DealerTrack-Arkona and Asbury Automotive Group Inc. • DealerBuilt-Lightyear and Don Wood Group	USA 2009 Smaller DMS
<b>March 2007 to February 2008 Subscription Year - Analyses supplied to Subscribers</b>	
1. European Developments & Trends - Italy - June 2007	Euro-Italy 2007
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3. North American Developments & Trends - Arkona - a subsidiary of DealerTrack - July 2007	USA 2007 - Arkona & DT
4. International Dealer Systems Providers - The "new" Incadea - September 2007	Internat. 2007 Incadea
5. International Dealer Systems Providers - SAP - Initial Review - October 2007	Internat. 2007 SAP Int.
6. International Dealer Systems Providers - Reynolds & Reynolds - European Operations - November 2007	Euro 2007 Reynolds
7. International Service Systems - January 2008	Internat. 2008 Service
8. North American Developments & Trends - Systems Interconnections - A changed situation - March 2008	USA 2008 Interconnect
<b>March 2006 to February 2007 Subscription Year - Analyses supplied to Subscribers</b>	
1. European Developments & Trends - Volume 2 - Dealers & Groups - April 2006	Euro 2006 Vol 2
2. European Developments & Trends - Volume 1 - The Market - June 2006	Euro 2006 Vol 1
3. The growing array of European Specialist Dealer System Providers - July 2006	Euro 2006 Specialists
4. North American Developments & Trends - November 2006	
5. Volume 1 - The Market, OEMs and Dealer Systems Providers	USA 2006 Vol 1
6. Volume 2 - OEM-Dealer Projects, Dealers & Groups	USA 2006 Vol 2
7. International Dealer Systems Providers - February 2007	International DSPs 2007

\* \* \* \* \*

**Searchable Contents List**

Section	Section Heading	Page	Document short title
	European Developments & Trends - Volume 1 - June 2006	1	Euro 2006 Vol 1
1	Executive Summary	2	Euro 2006 Vol 1
1.1.	The markets after the Block Exemption Regulation - 1400/2002 and its "Location Clause"	2	Euro 2006 Vol 1
1.2.	Demand for multi-Brand DMS	2	Euro 2006 Vol 1
1.3.	Demand for multi-Brand "Showroom Systems"	2	Euro 2006 Vol 1
1.4.	Automaker relationships with multi-Brand Groups and DSPs	2	Euro 2006 Vol 1
	Figure 1.1. Market factors in 2006	3	Euro 2006 Vol 1
1.5.	Showroom system trends - Lead Management and reporting	4	Euro 2006 Vol 1

Section	Section Heading	Page	Document short title
1.6.	Compliance	4	Euro 2006 Vol 1
1.7.	"Legacy" DMS	4	Euro 2006 Vol 1
1.8.	DMS providers - a market evolving in three "divisions"	5	Euro 2006 Vol 1
1.9.	DMS newcomers....	5	Euro 2006 Vol 1
1.10.	Composition of the DMS market	5	Euro 2006 Vol 1
1.11.	Impact of Dealer Groups on DSPs	6	Euro 2006 Vol 1
1.12.	How will DSPs increase their revenues?	6	Euro 2006 Vol 1
1.13.	OEM "Standards" affecting Dealers' systems	6	Euro 2006 Vol 1
1.14.	A changing market, under pressure	7	Euro 2006 Vol 1
2	Car and Truck makers (the OEMs) - Overview	8	Euro 2006 Vol 1
	Figure 2.1. OEM-Vertical and Group-Horizontal objectives require compromises	8	Euro 2006 Vol 1
2.1.	The latest European environment	9	Euro 2006 Vol 1
2.1.1.	Brussels is monitoring developments	9	Euro 2006 Vol 1
2.1.1.1.	OEM incentives for "IT"	10	Euro 2006 Vol 1
2.1.1.2.	Wider implications	10	Euro 2006 Vol 1
2.1.2.	Dealer and Group decisions	10	Euro 2006 Vol 1
2.1.3.	Implications for the OEMs	10	Euro 2006 Vol 1
2.2.	OEM strategies for Dealer systems	11	Euro 2006 Vol 1
2.2.1.	OEM Objectives	11	Euro 2006 Vol 1
2.2.2.	Integration requirements	11	Euro 2006 Vol 1
2.2.2.1.	Improved development methods	11	Euro 2006 Vol 1
2.2.3.	Strategic directions	12	Euro 2006 Vol 1
2.2.3.1.	Funding of development work	12	Euro 2006 Vol 1
2.2.3.2.	Charges to DSPs	12	Euro 2006 Vol 1
	Figure 2.2. OEM Strategy variants in Europe	13	Euro 2006 Vol 1
2.2.4.	A wide variety of OEM strategies	14	Euro 2006 Vol 1
2.2.5.	Compromises - up to a point!	14	Euro 2006 Vol 1
2.2.5.1.	Two reasons for "No processes!"	14	Euro 2006 Vol 1
2.2.6.	The situation in the markets	14	Euro 2006 Vol 1
2.2.7.	Flexible, multi-part strategies	15	Euro 2006 Vol 1
2.2.7.1.	The logical strategy for OEMs	15	Euro 2006 Vol 1
2.2.8.	Non-compliance with the BER?	15	Euro 2006 Vol 1
3	OEMs as Dealer System Providers	16	Euro 2006 Vol 1
3.1.	Surprising numbers	16	Euro 2006 Vol 1
3.2.	BMW	16	Euro 2006 Vol 1
3.3.	DaimlerChrysler-Mercedes-Benz	16	Euro 2006 Vol 1
3.4.	PSA - Italy	17	Euro 2006 Vol 1
3.5.	Ford of Europe	17	Euro 2006 Vol 1
3.6.	M.A.N. Trucks	17	Euro 2006 Vol 1
3.7.	Toyota/Lexus	17	Euro 2006 Vol 1
	Figure 3.1. OEMs directly involved as Dealer Systems Providers	18	Euro 2006 Vol 1
3.8.	Volvo Car and Volvo Truck	18	Euro 2006 Vol 1
3.9.	VW Group - VW, Audi, SEAT, Skoda	18	Euro 2006 Vol 1
3.9.1.	A higher-level involvement	19	Euro 2006 Vol 1
3.10.	Other OEM direct involvements	20	Euro 2006 Vol 1
3.11.	Trends	20	Euro 2006 Vol 1
3.11.1.	A potential casualty of the BER?	20	Euro 2006 Vol 1
4	Individual OEM Strategies	21	Euro 2006 Vol 1
4.0.1.	A very large number of strategies	21	Euro 2006 Vol 1
4.0.2.	OEM and Importer influence	21	Euro 2006 Vol 1
	Figure 4.1. OEM Networks - Dealers & DMS	22	Euro 2006 Vol 1
	Figure 4.2. OEM European Networks in Total	23	Euro 2006 Vol 1
	Figure 4.3. OEMs - Total European Networks - Average Sales per Dealer owner	24	Euro 2006 Vol 1
	Figure 4.4. OEMs - European Networks - Number of DMS Types in Networks	24	Euro 2006 Vol 1
4.0.3.	The OEMs covered	25	Euro 2006 Vol 1
4.0.4.	Standardisation within the Family	25	Euro 2006 Vol 1
4.0.5.	Different "attitudes" towards Dealers	25	Euro 2006 Vol 1
4.0.6.	The "balance" in the relationship	25	Euro 2006 Vol 1
4.1.	BMW and Mini	26	Euro 2006 Vol 1
4.1.1.	Overview	26	Euro 2006 Vol 1
4.1.1.1.	Implications of the strategy change	26	Euro 2006 Vol 1
4.1.2.	DMS	26	Euro 2006 Vol 1
4.1.3.	Dealer Communications	27	Euro 2006 Vol 1
4.1.4.	Electronic Catalogues	27	Euro 2006 Vol 1
4.1.5.	Other applications	27	Euro 2006 Vol 1
4.1.6.	Comment	27	Euro 2006 Vol 1
4.2.	The DaimlerChrysler (DC) Family	28	Euro 2006 Vol 1
4.2.1.	Overview	28	Euro 2006 Vol 1
4.2.2.	DMS	28	Euro 2006 Vol 1
4.2.3.	Dealer Communications	29	Euro 2006 Vol 1
4.2.4.	Electronic Catalogues	29	Euro 2006 Vol 1
4.2.5.	Other applications	29	Euro 2006 Vol 1

Section	Section Heading	Page	Document short title
4.2.6.	Comment	29	Euro 2006 Vol 1
4.3.	Fiat Auto - including Alfa Romeo and Lancia	30	Euro 2006 Vol 1
4.3.1.	Overview	30	Euro 2006 Vol 1
4.3.2.	DMS strategies	30	Euro 2006 Vol 1
4.3.3.	Dealer Communications	30	Euro 2006 Vol 1
4.3.4.	Electronic Catalogues	30	Euro 2006 Vol 1
4.3.5.	Other applications	30	Euro 2006 Vol 1
4.3.6.	Comment	30	Euro 2006 Vol 1
4.4.	The Ford and P.A.G. Family	32	Euro 2006 Vol 1
4.4.1.	Overview	32	Euro 2006 Vol 1
4.4.2.	DMS	32	Euro 2006 Vol 1
4.4.3.	Dealer Communications	33	Euro 2006 Vol 1
4.4.4.	Electronic Catalogues	33	Euro 2006 Vol 1
4.4.5.	Other applications	33	Euro 2006 Vol 1
4.4.6.	Comment	33	Euro 2006 Vol 1
4.5.	The GM Family Group	34	Euro 2006 Vol 1
4.5.1.	Overview	34	Euro 2006 Vol 1
4.4.2.	DMS	34	Euro 2006 Vol 1
4.5.3.	Dealer Communications	35	Euro 2006 Vol 1
4.5.4.	Electronic Catalogues	35	Euro 2006 Vol 1
4.5.5.	Other applications	35	Euro 2006 Vol 1
4.5.6.	Comment	35	Euro 2006 Vol 1
4.6.	Honda Motor Europe	36	Euro 2006 Vol 1
4.6.1.	Overview	36	Euro 2006 Vol 1
4.6.2.	DMS	36	Euro 2006 Vol 1
4.6.3.	Dealer Communications	36	Euro 2006 Vol 1
4.6.4.	Electronic Catalogues	36	Euro 2006 Vol 1
4.6.5.	Other applications	36	Euro 2006 Vol 1
4.6.6.	Comment	36	Euro 2006 Vol 1
4.7.	Mitsubishi Europe	37	Euro 2006 Vol 1
4.7.1.	Overview	37	Euro 2006 Vol 1
4.7.2.	DMS	37	Euro 2006 Vol 1
4.7.3.	Dealer Communications	37	Euro 2006 Vol 1
4.7.4.	Electronic Catalogues	37	Euro 2006 Vol 1
4.7.5.	Other applications	37	Euro 2006 Vol 1
4.7.6.	Comment	37	Euro 2006 Vol 1
4.8.	PSA - Citroën and Peugeot	38	Euro 2006 Vol 1
4.8.1.	Overview	38	Euro 2006 Vol 1
4.8.2.	DMS	38	Euro 2006 Vol 1
4.8.2.1.	Importers	39	Euro 2006 Vol 1
4.8.2.2.	Réparateurs Agréés - France	39	Euro 2006 Vol 1
4.8.3.	Dealer Communications	39	Euro 2006 Vol 1
4.8.4.	Electronic Catalogues	40	Euro 2006 Vol 1
4.8.5.	Other applications	40	Euro 2006 Vol 1
4.8.6.	Comment	40	Euro 2006 Vol 1
4.9.	Renault	41	Euro 2006 Vol 1
4.9.1.	Overview	41	Euro 2006 Vol 1
4.9.2.	DMS	41	Euro 2006 Vol 1
4.9.3.	Dealer Communications	43	Euro 2006 Vol 1
4.9.4.	Electronic Catalogues	43	Euro 2006 Vol 1
4.9.5.	Other applications	43	Euro 2006 Vol 1
4.9.6.	Comment on Renault	44	Euro 2006 Vol 1
4.10.	Nissan Europe	45	Euro 2006 Vol 1
4.10.1.	Overview	45	Euro 2006 Vol 1
4.10.2.	DMS	45	Euro 2006 Vol 1
4.10.3.	Dealer Communications	45	Euro 2006 Vol 1
4.10.4.	Electronic Catalogues	45	Euro 2006 Vol 1
4.10.5.	Other applications	45	Euro 2006 Vol 1
4.10.6.	Comment	45	Euro 2006 Vol 1
4.11.	Toyota Motor Europe	46	Euro 2006 Vol 1
4.11.1.	Overview	46	Euro 2006 Vol 1
4.11.2.	DMS	46	Euro 2006 Vol 1
4.11.3.	Dealer Communications	47	Euro 2006 Vol 1
4.11.4.	Electronic Catalogues	47	Euro 2006 Vol 1
4.11.5.	Other applications	47	Euro 2006 Vol 1
4.11.6.	Comment	47	Euro 2006 Vol 1
4.12.	The Volkswagen Family	48	Euro 2006 Vol 1
4.12.1.	Overview	48	Euro 2006 Vol 1
4.12.2.	DMS	48	Euro 2006 Vol 1
4.12.2.1.	DMS situations - by Country	49	Euro 2006 Vol 1
4.12.2.2.	Seat and Skoda	51	Euro 2006 Vol 1
4.12.3.	Dealer Communications	51	Euro 2006 Vol 1

Section	Section Heading	Page	Document short title
4.12.4	Electronic Catalogues	51	Euro 2006 Vol 1
4.12.5.	Other applications	51	Euro 2006 Vol 1
4.12.6.	Comment	51	Euro 2006 Vol 1
5	DCS Standards for Europe	52	Euro 2006 Vol 1
5.1.	Why are standards needed?	52	Euro 2006 Vol 1
5.1.1.	Not a sensible situation	52	Euro 2006 Vol 1
5.2.	ODETTE	52	Euro 2006 Vol 1
5.3.	STAR	52	Euro 2006 Vol 1
5.4.	Other potential leaders in Europe	53	Euro 2006 Vol 1
5.5.	ODETTE co-operation with STAR, plus...	54	Euro 2006 Vol 1
6	DMS providers and their systems	55	Euro 2006 Vol 1
6.1.	Developments in the past 2 years	55	Euro 2006 Vol 1
6.1.1.	Acquisition (consolidation) history	55	Euro 2006 Vol 1
	Figure 6.1. History of DSP Consolidations & Partnerships - to 2002	56	Euro 2006 Vol 1
	Figure 6.1. Major DSP Consolidations & Partnerships - from 2002	57	Euro 2006 Vol 1
6.1.2.	The newcomers	58	Euro 2006 Vol 1
6.1.3.	Partnerships	58	Euro 2006 Vol 1
6.1.3.1.	Software Developers	58	Euro 2006 Vol 1
6.1.3.2.	Growth in the use of Partners	59	Euro 2006 Vol 1
6.1.3.3.	DSPs partly selling via Partners	59	Euro 2006 Vol 1
6.1.3.4.	Developers ONLY selling via Partners	59	Euro 2006 Vol 1
6.1.3.5.	ERP developers and their Partners	59	Euro 2006 Vol 1
6.1.3.6.	Microsoft-Reynolds Partnerships	59	Euro 2006 Vol 1
6.1.3.7.	SAP and its Partners	60	Euro 2006 Vol 1
6.1.4.	Overall numbers of DSPs	61	Euro 2006 Vol 1
6.1.4.1.	Progress of ASP delivery of DMS	61	Euro 2006 Vol 1
6.1.4.2.	ASP delivery of other applications	61	Euro 2006 Vol 1
6.1.5.	Categories of DMS providers	61	Euro 2006 Vol 1
6.1.6.	Tier 1 multi-nationals	61	Euro 2006 Vol 1
6.1.6.1.	Will any others try to join them?	62	Euro 2006 Vol 1
6.1.6.2.	Important "global" differences	62	Euro 2006 Vol 1
6.1.7.	Tier 2 multi-nationals	63	Euro 2006 Vol 1
6.1.7.1.	Significant customer numbers	63	Euro 2006 Vol 1
6.1.7.2.	How strong is Tier 2?	63	Euro 2006 Vol 1
6.1.8.	National DSPs	63	Euro 2006 Vol 1
6.1.9.	American ownership of DSPs in Europe	65	Euro 2006 Vol 1
6.1.9.1.	Comment on American ownership	65	Euro 2006 Vol 1
6.1.9.2.	Other potential sources	65	Euro 2006 Vol 1
6.2.	Types of DMS	65	Euro 2006 Vol 1
	Figure 6.2.2. The main types of "legacy" DMS still in operation	66	Euro 2006 Vol 1
6.2.1.	A frustration for some OEMs	67	Euro 2006 Vol 1
6.2.2.	Main types of "legacy" DMS	67	Euro 2006 Vol 1
6.2.3.	"Modern" DMS types	67	Euro 2006 Vol 1
6.2.4.	Total number of DMS types	67	Euro 2006 Vol 1
6.3.	Tier 1 DMS providers and their systems	68	Euro 2006 Vol 1
6.3.1.	ADP Dealer Services including Kerridge	68	Euro 2006 Vol 1
6.3.2.	Reynolds & Reynolds including Incadea & DCS Automotive	74	Euro 2006 Vol 1
6.3.3.	SAP	80	Euro 2006 Vol 1
6.3.4.	T-Systems including gedas	83	Euro 2006 Vol 1
	Figure 6.1. Outline of the DMS products of the four Tier 1 DSPs	85	Euro 2006 Vol 1
6.4.	Tier 2 DMS providers and their systems	86	Euro 2006 Vol 1
6.4.1.	ASC and F+L	87	Euro 2006 Vol 1
6.4.2.	Aucon - a partner of Audev and EDS-MMS	89	Euro 2006 Vol 1
6.4.3.	AutoMaster	91	Euro 2006 Vol 1
6.4.4.	Datafirst	93	Euro 2006 Vol 1
6.4.5.	EDS-MMS - partner of R&R Incadea	95	Euro 2006 Vol 1
	Figure 6.4.5.1. Outline of the EDS-MMS Carlo Distribution Structure	96	Euro 2006 Vol 1
6.4.6.	Freicon	99	Euro 2006 Vol 1
6.4.7.	Quiter	100	Euro 2006 Vol 1
6.4.8.	Sage-Cogestib	102	Euro 2006 Vol 1
6.4.9.	UCS and Kalamazoo-UCS	104	Euro 2006 Vol 1
6.4.10.	Vector	108	Euro 2006 Vol 1
6.4.11.	Werbas	110	Euro 2006 Vol 1
	Figure 6.12. Outline of the DMS products of the eleven Tier 2 DSPs	112	Euro 2006 Vol 1
6.5.	Tier 3 - National DMS providers and their systems	113	Euro 2006 Vol 1
6.5.1.	National DSPs in France	114	Euro 2006 Vol 1
6.5.1.1.	ASD Informatique	114	Euro 2006 Vol 1
6.5.1.2.	CDMI	114	Euro 2006 Vol 1
6.5.1.3.	EBP	115	Euro 2006 Vol 1
6.5.1.4.	Everlog & Select'up	115	Euro 2006 Vol 1
6.5.1.5.	Fiducial	116	Euro 2006 Vol 1
6.5.1.6.	Micrauto	116	Euro 2006 Vol 1

Section	Section Heading	Page	Document short title
6.5.1.7.	Servisoft	117	Euro 2006 Vol 1
6.5.1.8.	Thales	117	Euro 2006 Vol 1
6.5.1.9.	Comment on France	118	Euro 2006 Vol 1
6.5.2.	National DSPs in Germany	119	Euro 2006 Vol 1
6.5.2.1.	Abis-REICOM	119	Euro 2006 Vol 1
6.5.2.2.	Betzemeier	119	Euro 2006 Vol 1
6.5.2.3.	datentechnik Zänker	120	Euro 2006 Vol 1
6.5.2.4.	DCM	120	Euro 2006 Vol 1
6.5.2.5.	GHS	121	Euro 2006 Vol 1
6.5.2.6.	Ingo Software	122	Euro 2006 Vol 1
6.5.2.7.	Hafu Software	122	Euro 2006 Vol 1
6.5.2.8.	Locosoft	122	Euro 2006 Vol 1
6.5.2.9.	MSD	122	Euro 2006 Vol 1
6.5.2.10.	Procar Informatik	123	Euro 2006 Vol 1
6.5.2.11.	VAPS	123	Euro 2006 Vol 1
6.5.2.12.	Weiss Blau	124	Euro 2006 Vol 1
6.5.2.13.	ZLS	124	Euro 2006 Vol 1
6.5.2.14.	SAP Partners	125	Euro 2006 Vol 1
6.5.2.15.	The ex-UCS Darts situation	125	Euro 2006 Vol 1
6.5.2.16.	Comment on Germany	125	Euro 2006 Vol 1
6.5.3.	National DSPs in Italy	126	Euro 2006 Vol 1
6.5.3.1.	Autentys	126	Euro 2006 Vol 1
6.5.3.2.	D.E.C.	127	Euro 2006 Vol 1
6.5.3.3.	Esseitalia	128	Euro 2006 Vol 1
6.5.3.4.	Global	129	Euro 2006 Vol 1
6.5.3.5.	Lynx-Axed	129	Euro 2006 Vol 1
6.5.3.6.	Tandem - AEC	130	Euro 2006 Vol 1
6.5.3.7.	Visual Software	130	Euro 2006 Vol 1
6.5.3.8.	BIT	130	Euro 2006 Vol 1
6.5.3.9.	Comments on Italy	131	Euro 2006 Vol 1
6.5.4.	National DSPs in the UK	132	Euro 2006 Vol 1
6.5.4.1.	Ebbon-Dacs	132	Euro 2006 Vol 1
6.5.4.2.	Gemini	132	Euro 2006 Vol 1
6.5.4.3.	KBA - Partner of AutoMaster	133	Euro 2006 Vol 1
6.5.4.4.	MMI Automotive	133	Euro 2006 Vol 1
6.5.4.5.	Pinewood	134	Euro 2006 Vol 1
6.5.4.6.	Comment on the UK	136	Euro 2006 Vol 1
6.5.5.	National DSPs in Austria	137	Euro 2006 Vol 1
6.5.5.1.	Porsche Informatik	137	Euro 2006 Vol 1
6.5.5.2.	S4 Computer	137	Euro 2006 Vol 1
6.5.6.	National DSPs in Benelux	138	Euro 2006 Vol 1
6.5.6.1.	D'leteren - VW Importer - Belgium	138	Euro 2006 Vol 1
6.5.6.2.	Pon - VW Importer - Netherlands	138	Euro 2006 Vol 1
6.5.6.3.	Small DSPs in Benelux	138	Euro 2006 Vol 1
6.5.7.	National DSPs in Denmark	139	Euro 2006 Vol 1
6.5.7.1.	Infonizer	139	Euro 2006 Vol 1
6.5.7.2.	IT2000	139	Euro 2006 Vol 1
6.5.8.	National DSPs in Portugal	140	Euro 2006 Vol 1
6.5.8.1.	Importer based DSPs	140	Euro 2006 Vol 1
6.5.8.2.	SGI	140	Euro 2006 Vol 1
6.5.9.	National DSPs in Spain	140	Euro 2006 Vol 1
6.5.9.1.	CCS	140	Euro 2006 Vol 1
6.5.10.	National DSPs in Sweden	142	Euro 2006 Vol 1
6.5.11.	Notes on other DSPs in Europe	142	Euro 2006 Vol 1
6.5.11.1.	DMS - Ireland	142	Euro 2006 Vol 1
6.5.11.2.	IN4U - Switzerland	142	Euro 2006 Vol 1
6.5.11.3.	MAI - Switzerland	142	Euro 2006 Vol 1
6.5.11.4.	SI Data - Norway	142	Euro 2006 Vol 1
6.5.11.5.	Solteq - Finland	142	Euro 2006 Vol 1
6.5.11.6.	Comment on some others...Atos Origin & Tectura	142	Euro 2006 Vol 1
	European Developments & Trends - April 2006 - Volume 2	1	Euro 2006 Vol 2
1	Dealers & Groups - an overview of their situations and systems	2	Euro 2006 Vol 2
1.1.	The variety of Dealer situations	2	Euro 2006 Vol 2
1.2.	The current trends	2	Euro 2006 Vol 2
1.2.1.	A shortage of good data	3	Euro 2006 Vol 2
1.3.	Special situations	3	Euro 2006 Vol 2
1.4.	Attitudes towards "multi-Brand"	3	Euro 2006 Vol 2
1.4.1.	Many Dealers are not secure	3	Euro 2006 Vol 2
1.5.	Freedom to choose systems	4	Euro 2006 Vol 2
1.5.1.	A "mixed blessing"?	4	Euro 2006 Vol 2
1.5.2.	Still some heavy pressure	4	Euro 2006 Vol 2
1.5.3.	The end result	4	Euro 2006 Vol 2

Section	Section Heading	Page	Document short title
1.5.4.	Possible strategies for "100%"	5	Euro 2006 Vol 2
1.5.5.	Lead Management systems	5	Euro 2006 Vol 2
1.5.5.1.	An example in the UK	5	Euro 2006 Vol 2
1.5.6.	Other automaker developments	5	Euro 2006 Vol 2
1.5.7.	Comment on the trend	5	Euro 2006 Vol 2
1.6.	Seven examples of Dealer situations	6	Euro 2006 Vol 2
1.6.1.	Brief updates (see Section 6.)	6	Euro 2006 Vol 2
1.7.	Dealers & Groups reviewed in 2003, 2004 and 2005	7	Euro 2006 Vol 2
	Figure 1.1. Locations of Dealers & Groups reviewed in this Analysis and in the previous three years	8	Euro 2006 Vol 2
2	Three-way Co-operatives - Solutions to support the situation	9	Euro 2006 Vol 2
2.0.1.	Overview of the Swedish market	9	Euro 2006 Vol 2
	Figure 2.0.1. Sweden - an overview	9	Euro 2006 Vol 2
2.1.	BITS DATA - Sweden - Systems for VW and Scania Dealers	10	Euro 2006 Vol 2
2.1.7.	Olofsson Bil - customer of BITS DATA	15	Euro 2006 Vol 2
2.2.	Volvohandelns Utvecklings AB (VHUTV) - Sweden & Norway	17	Euro 2006 Vol 2
2.2.2.2.	Background to TACDIS	18	Euro 2006 Vol 2
2.2.2.3.	Volvo Truck moving to GDS	18	Euro 2006 Vol 2
	Figure 2.2.1. VHUTV Volvo Renault systems structure - in outline	19	Euro 2006 Vol 2
2.2.2.4.	Multi-Brand coming... slowly	20	Euro 2006 Vol 2
2.2.3.	Dealer systems structure	20	Euro 2006 Vol 2
2.2.3.1.	The DMS	20	Euro 2006 Vol 2
2.2.3.2.	GI - Common Information	21	Euro 2006 Vol 2
2.2.3.3.	KM - Customer Market System	21	Euro 2006 Vol 2
2.2.3.4.	Finance Systems	22	Euro 2006 Vol 2
2.2.3.5.	Volvo Car Buying Service	22	Euro 2006 Vol 2
2.2.3.6.	Cost of TACDIS, GI and KM	22	Euro 2006 Vol 2
2.2.4.	Comment on VHUTV	22	Euro 2006 Vol 2
3	Used vehicle specialists	23	Euro 2006 Vol 2
3.0.1.	The vehicle business in Europe	23	Euro 2006 Vol 2
3.0.2.	Used vehicle disposals	23	Euro 2006 Vol 2
3.0.3.	The 3rd category of vehicles	23	Euro 2006 Vol 2
3.1.	Autohaus Brüggemann	24	Euro 2006 Vol 2
3.1.1.	Background to Brüggemann	24	Euro 2006 Vol 2
3.1.2.	Retail sales operations in Rheine	24	Euro 2006 Vol 2
	Figure 3.1. - 3.10 Autohaus Brüggemann - operations in Rheine	25	Euro 2006 Vol 2
3.1.2.1.	On-site Bank	26	Euro 2006 Vol 2
3.1.2.2.	On-site Café/Bistro	26	Euro 2006 Vol 2
3.1.3.	Wholesale operations in Rheine	26	Euro 2006 Vol 2
3.1.4.	The Auction	26	Euro 2006 Vol 2
3.1.5.	Comment on Rheine operations	27	Euro 2006 Vol 2
3.1.6.	The systems used	27	Euro 2006 Vol 2
3.1.6.1.	Background to Betzemeier	28	Euro 2006 Vol 2
3.1.6.2.	Background to WerWiSo	28	Euro 2006 Vol 2
	Figure 3.11. An example of a screen from Betzemeier's WerWiSo	28	Euro 2006 Vol 2
3.1.6.3.	Brüggemann system history	29	Euro 2006 Vol 2
3.1.6.4.	WerWiSo Configuration	29	Euro 2006 Vol 2
	Figure 3.12. WerWiSo configuration in Brüggemann	29	Euro 2006 Vol 2
3.1.7.4.	Brüggemann's use of WerWiSo	30	Euro 2006 Vol 2
	Figure 3.13. A screen from Betzemeier's WerWiSo Auction module	30	Euro 2006 Vol 2
4	Multi-Brand Groups using specialist "front-end" systems	32	Euro 2006 Vol 2
4.0.1.	"Old" DMS	32	Euro 2006 Vol 2
4.0.2.	Even "Modern" DMS	32	Euro 2006 Vol 2
4.0.3.	Specialists can move quickly...	32	Euro 2006 Vol 2
4.0.4.	Dealer and Group preferences	32	Euro 2006 Vol 2
4.1.	Carmeile and Dresden (Germany)	33	Euro 2006 Vol 2
4.2.	Dresen Gruppe - Düsseldorf (Germany)	35	Euro 2006 Vol 2
4.2.3.	Carmeile in Honda	37	Euro 2006 Vol 2
4.3.	Listers Group (No. 23 in UK AM100)	38	Euro 2006 Vol 2
4.3.4.	Use of Contact Advantage	40	Euro 2006 Vol 2
4.4.	Benfield Motor (No. 28 in UK AM100 Top Groups)	43	Euro 2006 Vol 2
4.4.3.1.	Elite DMS	46	Euro 2006 Vol 2
4.4.3.3.	Fastrack sales system	46	Euro 2006 Vol 2
5	Dealer Groups standardising on ERP	52	Euro 2006 Vol 2
5.0.1.	Groups using SAP	52	Euro 2006 Vol 2
5.0.2.	Groups using Reynolds Incadea	52	Euro 2006 Vol 2
5.0.3.	Others	52	Euro 2006 Vol 2
5.1.	Inchcape - International Automotive Group	53	Euro 2006 Vol 2
	Figure 5.1. Inchcape Group - overview of international operations	53	Euro 2006 Vol 2
5.1.1.	Dealer businesses	54	Euro 2006 Vol 2
5.1.2.	Group objectives	54	Euro 2006 Vol 2
5.1.3.	A long search for standardisation	54	Euro 2006 Vol 2

Section	Section Heading	Page	Document short title
5.1.4.	First stage standardisation	55	Euro 2006 Vol 2
5.1.5.	2nd stage standardisation	55	Euro 2006 Vol 2
5.1.5.1.	Selection and decision	55	Euro 2006 Vol 2
5.1.5.2.	Responsibilities	55	Euro 2006 Vol 2
5.1.5.3.	Data Warehouse	56	Euro 2006 Vol 2
5.1.5.4.	Other systems	56	Euro 2006 Vol 2
5.1.5.4.	Inchcape's IT support teams	56	Euro 2006 Vol 2
5.1.6.	Comments	56	Euro 2006 Vol 2
5.2.	Other Dealer Groups standardising on ERP	57	Euro 2006 Vol 2
5.2.1.	Groups using Reynolds Incadea	57	Euro 2006 Vol 2
5.2.1.1.	ACB Dürkop	57	Euro 2006 Vol 2
5.2.1.2.	Häusler Automobil GmbH	57	Euro 2006 Vol 2
5.2.1.3.	Auto Staiger - Stuttgart	58	Euro 2006 Vol 2
5.2.1.4.	Motorhuis - the Netherlands	58	Euro 2006 Vol 2
5.2.1.5.	Conclusions on Incadea	58	Euro 2006 Vol 2
5.2.2.	Groups using Microsoft Axapta	59	Euro 2006 Vol 2
5.2.2.1.	Nellemann Group - Denmark	59	Euro 2006 Vol 2
5.2.3.	Groups using SAP's platform(s)	59	Euro 2006 Vol 2
5.2.3.1.	AMAG (Switzerland)	60	Euro 2006 Vol 2
5.2.3.2.	ASAG (Switzerland)	60	Euro 2006 Vol 2
5.2.3.3.	BMW's own Dealers (Germany)	60	Euro 2006 Vol 2
5.2.3.4.	Wayside Group (UK)	61	Euro 2006 Vol 2
5.2.3.5.	Comment on SAP	61	Euro 2006 Vol 2
6	Updates on 6 Groups reviewed in 2005	62	Euro 2006 Vol 2
6.1.	Gruppo Car World Italia - Milan, Italy	62	Euro 2006 Vol 2
6.2.	Frey Gruppe - Germany	62	Euro 2006 Vol 2
6.3.	Kroymans - Netherlands	62	Euro 2006 Vol 2
6.4.	Pendragon Group - UK	62	Euro 2006 Vol 2
6.5.	Stern Group - Netherlands	62	Euro 2006 Vol 2
6.6.	Marshall Motor Group - UK	63	Euro 2006 Vol 2
6.7.	Sytner Group - UK (part of UAG)	64	Euro 2006 Vol 2
7	Another type of "Group"	65	Euro 2006 Vol 2
7.1.	Retail Automotive Alliance (RAA)	65	Euro 2006 Vol 2
7.2.	Comment on the RAA	65	Euro 2006 Vol 2
	North American Developments & Trends - Volume 1 - November 2006	1	USA 2006 Vol 1
	Volume 1 - concentrating on...	1	USA 2006 Vol 1
	The Market - an overview of developments and trends.	1	USA 2006 Vol 1
	OEMs - Vehicle Manufacturers and their Dealer-related systems.	1	USA 2006 Vol 1
	DSPs - Dealer Systems and Services Providers.	1	USA 2006 Vol 1
	Volume 2 - concentrating on...	1	USA 2006 Vol 1
	Dealers - interesting situations	1	USA 2006 Vol 1
	Groups - strategies and developments	1	USA 2006 Vol 1
	OEM projects involving their Dealer Networks.	1	USA 2006 Vol 1
1	Executive Summary	2	USA 2006 Vol 1
1.1.	DMS business	2	USA 2006 Vol 1
	Two providers continue to dominate	2	USA 2006 Vol 1
	Market view of the merger...	2	USA 2006 Vol 1
	The "smaller" DMS providers...	3	USA 2006 Vol 1
	The "Newcomer" DMS providers...	3	USA 2006 Vol 1
1.1.1.	GM's attempt to change the DMS market...	3	USA 2006 Vol 1
	Figure 1.1. Dealer Business and the categories of DSP which support it	4	USA 2006 Vol 1
1.2.	Specialist DSP business	5	USA 2006 Vol 1
1.3.	The "FANS" - Finance and Insurance Networks	5	USA 2006 Vol 1
1.4.	OEM developments	5	USA 2006 Vol 1
1.5.	Open competition in the market	6	USA 2006 Vol 1
1.6.	Dealer and Group strategies	7	USA 2006 Vol 1
1.7.	Closing comment	8	USA 2006 Vol 1
1.8.	Recent information on R&R-UCS - just before printing started	8	USA 2006 Vol 1
2	Market Review in more detail	9	USA 2006 Vol 1
2.1.	UCS-R&R - an event takes priority	9	USA 2006 Vol 1
2.1.1.	Comment on the merged Company	9	USA 2006 Vol 1
2.1.2.	Future product strategy	9	USA 2006 Vol 1
2.1.2.1.	ERA has a long life ahead	10	USA 2006 Vol 1
2.1.2.2.	Power also has a long life ahead	10	USA 2006 Vol 1
2.1.2.3.	A two-product strategy	10	USA 2006 Vol 1
2.2.	Changing positions of the "Big 2"	10	USA 2006 Vol 1
	Figure 2.1. Estimates of time to change from ERA to other DMS	11	USA 2006 Vol 1
2.2.1.	The cause of market "sentiment"	12	USA 2006 Vol 1
2.2.2.	Much will depend on "credibility"	12	USA 2006 Vol 1
2.2.3.	Effect on the competitive position	13	USA 2006 Vol 1
2.3.	Pressures on the "Big 2"	13	USA 2006 Vol 1
2.3.1.	OEM actions	13	USA 2006 Vol 1

Section	Section Heading	Page	Document short title
	Figure 2.2. Current pressures on ADP and R&R-UCS	14	USA 2006 Vol 1
2.3.2.	Developments by Specialists	15	USA 2006 Vol 1
2.3.3.	Dealer decisions	15	USA 2006 Vol 1
2.3.4.	Large-scale potential challengers	16	USA 2006 Vol 1
2.3.5.	The combined effect	17	USA 2006 Vol 1
2.4.	The Specialist DSPs	17	USA 2006 Vol 1
2.4.1.	Continuing evolution	17	USA 2006 Vol 1
2.4.1.1.	F&I Specialists have lost share	17	USA 2006 Vol 1
2.4.1.2.	Leasing Specialists gained share	17	USA 2006 Vol 1
2.4.1.3.	"CRM" Specialists	18	USA 2006 Vol 1
2.4.2.	Other categories of Specialists	18	USA 2006 Vol 1
2.4.2.1.	In tune with the market	19	USA 2006 Vol 1
2.4.3.	Objectives of the Specialists	19	USA 2006 Vol 1
2.5.	What role will the OEMs play?	19	USA 2006 Vol 1
2.5.1.	Canada is another country...	19	USA 2006 Vol 1
2.5.2.	Influence on DMS selection	19	USA 2006 Vol 1
2.5.3.	A possible change in the situation?	20	USA 2006 Vol 1
2.5.4.	OEMs and Specialist DSPs	20	USA 2006 Vol 1
2.5.4.1.	"Showroom" systems to-date	20	USA 2006 Vol 1
2.5.4.2.	One (unlikely) solution	21	USA 2006 Vol 1
2.5.4.3.	GM's OneSource	21	USA 2006 Vol 1
2.5.5.	The other OEM change of role	22	USA 2006 Vol 1
2.5.5.1.	The impact of IDMS	22	USA 2006 Vol 1
2.5.5.2.	GM alone so far	22	USA 2006 Vol 1
2.6.	The "Open Connection" business	22	USA 2006 Vol 1
2.6.1.	Data exchange and enhancement	22	USA 2006 Vol 1
2.6.1.1.	R&R's action	23	USA 2006 Vol 1
2.6.1.2.	Open Secure Access (OSA)	23	USA 2006 Vol 1
2.6.2.	The "Hubs"	23	USA 2006 Vol 1
2.6.3.	Data and System Security	24	USA 2006 Vol 1
2.6.4.	The "DCS situation"	24	USA 2006 Vol 1
2.6.5.	Conclusions on "Open Connections"	24	USA 2006 Vol 1
2.7.	Dealers and Groups	25	USA 2006 Vol 1
2.7.1.	Centralisation continues	25	USA 2006 Vol 1
2.7.1.1.	Different approaches	25	USA 2006 Vol 1
2.7.2.	The need to be "compliant"	25	USA 2006 Vol 1
2.7.2.1.	Different approaches	25	USA 2006 Vol 1
2.7.2.2.	Extent of "Compliance" systems	26	USA 2006 Vol 1
2.7.3.	"Multiple-option" selling	26	USA 2006 Vol 1
2.7.3.1.	Benefits of "multiple-option"	26	USA 2006 Vol 1
2.7.4.	Growth in showroom systems	26	USA 2006 Vol 1
2.7.5.	New vehicle order optimisation	27	USA 2006 Vol 1
	Figure 2.3. Group New vehicle order optimisation with 3 OEMs	27	USA 2006 Vol 1
2.7.5.1.	OEM co-operation	28	USA 2006 Vol 1
2.7.5.2.	Order calculation specialist	28	USA 2006 Vol 1
2.7.5.3.	A "Hub" provides the connections	28	USA 2006 Vol 1
2.7.5.4.	Impact on the Group	28	USA 2006 Vol 1
2.7.6.	The desire not to change the DMS	28	USA 2006 Vol 1
2.7.6.1.	A good reason needed	28	USA 2006 Vol 1
2.8.	An important next 12 months	29	USA 2006 Vol 1
2.8.1.	All DCS to operate via the open Internet by 2010?	29	USA 2006 Vol 1
2.8.2.	On-line vehicle buying... by Dealers	29	USA 2006 Vol 1
3	STAR, "Hubs", Integration and Data Exchange Services	30	USA 2006 Vol 1
3.1.	Overview	30	USA 2006 Vol 1
3.1.1.	Achievements of STAR	30	USA 2006 Vol 1
3.1.2.	Areas not covered by STAR	30	USA 2006 Vol 1
	Figure 3.1. STAR, "Hubs", Integration and Data Exchange Services	31	USA 2006 Vol 1
	Figure 3.2. STAR Members and published Standards	32	USA 2006 Vol 1
	Figure 3.3. XML Standards - 80 individual Standard data descriptions (BODs)	33	USA 2006 Vol 1
3.2.	The status of STAR	34	USA 2006 Vol 1
3.2.1.	Extent of STAR standards	34	USA 2006 Vol 1
3.2.2.	Future "special" requirements	34	USA 2006 Vol 1
3.2.3.	OEM implementations so far	35	USA 2006 Vol 1
3.2.4.	STAR's direction - Membership	35	USA 2006 Vol 1
3.2.5.	STAR's direction - "Tools"	35	USA 2006 Vol 1
3.2.6.	The role of AIAG	36	USA 2006 Vol 1
3.2.6.1.	A complex implication and question	36	USA 2006 Vol 1
3.2.7.	Still the market's chosen direction	36	USA 2006 Vol 1
3.2.7.1.	OEM variations still the problem	37	USA 2006 Vol 1
3.3.	"Hubs"	38	USA 2006 Vol 1
3.3.1.	The role of "Hubs"	38	USA 2006 Vol 1
3.3.2.	Specialists offering "Hubs"	38	USA 2006 Vol 1

Section	Section Heading	Page	Document short title
3.3.3.	Cobalt Integralink	38	USA 2006 Vol 1
3.3.4.	Oxlo Systems	39	USA 2006 Vol 1
3.3.4.1.	Relationship with STAR	39	USA 2006 Vol 1
3.3.4.2.	Oxlo's customers - OEMs & FANs	39	USA 2006 Vol 1
	Figure 3.4. Oxlo's "Connections"	39	USA 2006 Vol 1
3.3.4.3.	Oxlo's customers - The DSPs	40	USA 2006 Vol 1
3.3.4.4.	Comment on Oxlo	40	USA 2006 Vol 1
3.3.4.5.	Importance of independence	41	USA 2006 Vol 1
3.4.	Data Exchange & Enhancement	41	USA 2006 Vol 1
3.4.1.	A high volume business	41	USA 2006 Vol 1
3.4.2.	Multiple service providers	41	USA 2006 Vol 1
3.4.3.	OSA - a new battle evolving?	42	USA 2006 Vol 1
3.4.4.	Participants and key issues	42	USA 2006 Vol 1
3.4.5.	Progress-to-date	42	USA 2006 Vol 1
3.4.6.	More about OSA's objectives	43	USA 2006 Vol 1
3.5.	Vital factors in the market	43	USA 2006 Vol 1
4	Finance Acceptance Networks (FANs)	44	USA 2006 Vol 1
4.0.1.	A fiercely competitive sector, and widening in scope	44	USA 2006 Vol 1
4.0.2.	The Insurance part of "F&I"	44	USA 2006 Vol 1
4.0.3.	The American Market	44	USA 2006 Vol 1
4.0.4.	The Canadian Market	44	USA 2006 Vol 1
4.0.5.	FANs reviewed	45	USA 2006 Vol 1
4.1.	DealerTrack - USA	46	USA 2006 Vol 1
4.1.1.	DealerTrack in the market	46	USA 2006 Vol 1
4.1.2.	Background to DealerTrack	46	USA 2006 Vol 1
4.1.3.	Current status	47	USA 2006 Vol 1
4.1.4.	Acquisitions	47	USA 2006 Vol 1
	Figure 4.1.1. DealerTrack - Aquisitions and current Product structure	48	USA 2006 Vol 1
4.1.5.	Harmonisation	49	USA 2006 Vol 1
4.1.5.1.	Acquisitions - Applications	49	USA 2006 Vol 1
4.1.6.	Product overview	49	USA 2006 Vol 1
4.1.6.1.	DT's own product	49	USA 2006 Vol 1
4.1.6.2.	Integration of Web ALG	49	USA 2006 Vol 1
4.1.6.3.	Integration of CreditConnection	49	USA 2006 Vol 1
4.1.6.4.	Integration of LML Technologies	49	USA 2006 Vol 1
4.1.6.5.	Integration of DealerAccess	50	USA 2006 Vol 1
4.1.6.6.	Integration of ALG	50	USA 2006 Vol 1
4.1.6.7.	Integration of GoBig and NAT	50	USA 2006 Vol 1
	Figure 4.1.2. Overview of Aquisitions and Partners and current Product Line	51	USA 2006 Vol 1
4.1.6.8.	Integration of Chrome Systems	51	USA 2006 Vol 1
4.1.6.9.	Intergration of DealerWire	51	USA 2006 Vol 1
4.1.6.10.	Integration of Global Fax	52	USA 2006 Vol 1
4.1.7.	Other Product developments	52	USA 2006 Vol 1
4.1.7.1.	eContracting	52	USA 2006 Vol 1
	Figure 4.1.3. Systems and services accessed via DealerTrack's Channel - USA	53	USA 2006 Vol 1
4.1.7.2.	DealWatch	54	USA 2006 Vol 1
4.1.7.3.	ExactID	54	USA 2006 Vol 1
4.1.7.4.	Website Plus	54	USA 2006 Vol 1
4.1.7.5.	DealTransfer	54	USA 2006 Vol 1
4.1.8.	Competitive position	55	USA 2006 Vol 1
4.1.9.	Pricing structure	55	USA 2006 Vol 1
4.1.10.	Comments and conclusions on DT	55	USA 2006 Vol 1
4.1.11.	DealerAccess (DA) - Canada	57	USA 2006 Vol 1
4.1.11.1	A separate business	57	USA 2006 Vol 1
4.1.11.2.	Competitive situation	57	USA 2006 Vol 1
4.1.11.3.	DMS Integration	57	USA 2006 Vol 1
4.1.11.4.	The system	57	USA 2006 Vol 1
4.1.11.5.	Comment	57	USA 2006 Vol 1
4.2.	RouteOne (R1) - USA and Canada	58	USA 2006 Vol 1
4.2.1.	RouteOne in the market	58	USA 2006 Vol 1
	Figure 4.2.1. Systems and services accessed via RouteOne's Channel	59	USA 2006 Vol 1
4.2.1.1.	Use of STAR standards	59	USA 2006 Vol 1
4.2.2.	Product range	59	USA 2006 Vol 1
4.2.2.1.	Innovation	60	USA 2006 Vol 1
4.2.2.2.	User interface enhancement	60	USA 2006 Vol 1
4.2.2.3.	Electronic Contracting (eC)	61	USA 2006 Vol 1
4.2.2.4.	DSP Integration	61	USA 2006 Vol 1
4.2.2.5.	OEM Brand-specifics	62	USA 2006 Vol 1
4.2.2.6.	Other product features	62	USA 2006 Vol 1
4.2.3.	Canada	62	USA 2006 Vol 1
4.2.4.	A new Partner	63	USA 2006 Vol 1
4.2.5.	Comments and conclusions	63	USA 2006 Vol 1

Section	Section Heading	Page	Document short title
4.2.5.1.	Progress - market coverage	63	USA 2006 Vol 1
4.2.5.2.	Progress - applications	63	USA 2006 Vol 1
4.2.5.3.	Resources	63	USA 2006 Vol 1
4.2.5.4.	Managing its owners	63	USA 2006 Vol 1
4.2.5.5.	Conclusions	63	USA 2006 Vol 1
4.3.	Curomax	64	USA 2006 Vol 1
4.4.	BIGFNI	66	USA 2006 Vol 1
4.5.	CUDL	68	USA 2006 Vol 1
4.6.	Finance Express - FEX	69	USA 2006 Vol 1
4.7.	StoneEagle	71	USA 2006 Vol 1
5	OEM Strategies	74	USA 2006 Vol 1
5.0.1.	The main changes since 2005	74	USA 2006 Vol 1
	Figure 5.1. OEM Dealer Systems	75	USA 2006 Vol 1
5.1.	Two "special situation" OEMs	76	USA 2006 Vol 1
5.2.	Six "premium Brand" OEMs	76	USA 2006 Vol 1
	Figure 5.2. OEM Networks	77	USA 2006 Vol 1
5.2.1.	Acura	78	USA 2006 Vol 1
5.2.2.	Audi	78	USA 2006 Vol 1
5.2.3.	BMW and MINI	78	USA 2006 Vol 1
5.2.4.	Lexus	80	USA 2006 Vol 1
5.2.5.	Mercedes-Benz (plus SMART) - part of DaimlerChrysler	81	USA 2006 Vol 1
5.2.6.	P.A.G. - Jaguar, Land Rover, Volvo Car	83	USA 2006 Vol 1
5.3.	Nine "volume Brand" OEMs	85	USA 2006 Vol 1
5.3.1.	Chrysler - part of DaimlerChrysler	86	USA 2006 Vol 1
5.3.2.	Ford and Lincoln-Mercury	88	USA 2006 Vol 1
5.3.3.	General Motors - Buick, Cadillac, Chevrolet, GMC, Pontiac	88	USA 2006 Vol 1
5.3.4.	Honda and Acura	89	USA 2006 Vol 1
5.3.5.	Hyundai	90	USA 2006 Vol 1
5.3.6.	Mitsubishi - MMNA	92	USA 2006 Vol 1
5.3.7.	Nissan and Infiniti	93	USA 2006 Vol 1
5.3.8.	Toyota-Lexus	94	USA 2006 Vol 1
5.3.9.	Volkswagen of North America	95	USA 2006 Vol 1
6	Division 1 Dealer Systems Providers	97	USA 2006 Vol 1
6.0.1.	Who should be in this category?	97	USA 2006 Vol 1
6.0.2.	Competitors to the "Big 2"	98	USA 2006 Vol 1
	Figure 6.0.1. DMS providers in the USA & Canada	98	USA 2006 Vol 1
	Figure 6.0.2. 72 Specialists in the USA & Canada	98	USA 2006 Vol 1
	Figure 6.0.3. DMS providers - Dealer locations supported	99	USA 2006 Vol 1
	Figure 6.0.4. DMS providers - Estimated revenues	99	USA 2006 Vol 1
6.0.3.	This year's reviews of the "Big 2"	100	USA 2006 Vol 1
6.1.	ADP Dealer Services	101	USA 2006 Vol 1
6.1.1.	Financial performance to-date	101	USA 2006 Vol 1
6.1.2.	Customer bases in North America	101	USA 2006 Vol 1
6.1.3.	Acquisitions in 2006	101	USA 2006 Vol 1
6.1.4.	A new "partnership" for "Menus"	102	USA 2006 Vol 1
6.1.5.	Major Accounts	102	USA 2006 Vol 1
6.1.6.	Product-line	102	USA 2006 Vol 1
6.1.6.1.	DMS range	102	USA 2006 Vol 1
6.1.6.2.	"Specialist" systems	103	USA 2006 Vol 1
6.1.6.3.	ASP operation	103	USA 2006 Vol 1
6.1.6.4.	ASP development	103	USA 2006 Vol 1
	Figure 6.1.1. ADP Dealer Services - North America	104	USA 2006 Vol 1
6.1.6.5.	web2006 development	104	USA 2006 Vol 1
	Figure 6.1.2. ADP's web2006 plus specialist "Front-end" and "Back-end" modules	105	USA 2006 Vol 1
6.1.6.6.	Web1000 development	106	USA 2006 Vol 1
6.1.6.7.	DMS@NET.NG development	106	USA 2006 Vol 1
6.1.6.8.	The role of BZ Productions	106	USA 2006 Vol 1
6.1.6.9.	DCS Connections	106	USA 2006 Vol 1
6.1.7.	Partnerships	107	USA 2006 Vol 1
6.1.8.	API - External Interfaces	107	USA 2006 Vol 1
6.1.9.	Comment on ADP	107	USA 2006 Vol 1
6.2.	Reynolds & Reynolds (R&R-UCS)	109	USA 2006 Vol 1
6.2.1.	Financial performance to-date - R&R	109	USA 2006 Vol 1
6.2.1.1.	Financial performance - UCS	109	USA 2006 Vol 1
6.2.1.2.	Financial "summary"	109	USA 2006 Vol 1
6.2.2.	Customer bases in North America	110	USA 2006 Vol 1
6.2.2.1.	Customer base summary	110	USA 2006 Vol 1
6.2.3.	Acquisitions in 2006	110	USA 2006 Vol 1
6.2.3.1.	A different approach in future	110	USA 2006 Vol 1
6.2.4.	A Partnership for Vehicle Inventory	110	USA 2006 Vol 1
	Figure 6.2.1. Reynolds & Reynolds - North America	111	USA 2006 Vol 1
6.2.5.	Major Accounts - R&R	111	USA 2006 Vol 1

Section	Section Heading	Page	Document short title
6.2.5.1.	GM's IDMS recommendation	112	USA 2006 Vol 1
6.2.5.2.	Major Accounts - USA	112	USA 2006 Vol 1
6.2.6.	Product-line - overview	112	USA 2006 Vol 1
6.2.6.1.	R&R's ERA DMS and "Add-ons"	112	USA 2006 Vol 1
6.2.6.2.	ERA versions and modules	112	USA 2006 Vol 1
	Figure 6.2.2. Reynolds & Reynolds - ERA Strategy - pre October 2006	113	USA 2006 Vol 1
6.2.6.3.	UCS Power DMS - overview	114	USA 2006 Vol 1
6.2.6.4.	Power "platform"	115	USA 2006 Vol 1
	Figure 6.2.3. - Power DMS - before the next major release in early 2007	115	USA 2006 Vol 1
6.2.6.5.	Power Applications - pre 2007	116	USA 2006 Vol 1
6.2.6.6.	Power - External Interfaces	117	USA 2006 Vol 1
6.2.6.7.	RCI - External Interfaces	117	USA 2006 Vol 1
6.2.7.	Parts Catalogs (EPC)	118	USA 2006 Vol 1
6.2.8.	Future of the combined R&R-UCS	118	USA 2006 Vol 1
6.2.8.1.	A certainty	118	USA 2006 Vol 1
6.2.8.2.	Fixed assets	118	USA 2006 Vol 1
6.2.8.3.	Product probabilities	118	USA 2006 Vol 1
6.2.8.4.	Market sentiment	119	USA 2006 Vol 1
6.2.8.5.	A complex task	119	USA 2006 Vol 1
7	Division 2 DMS Providers	120	USA 2006 Vol 1
7.0.1.	Significant in numbers, but not yet in Revenues	120	USA 2006 Vol 1
7.0.2.	Future potential	120	USA 2006 Vol 1
7.0.3.	The "unknown" effect of R&R-UCS	121	USA 2006 Vol 1
7.0.4.	Over 30 smaller DMS Providers in the market	121	USA 2006 Vol 1
	Figure 7.0. Smaller DMS providers - relative positions	122	USA 2006 Vol 1
7.0.5.	Those not in the Charts	123	USA 2006 Vol 1
7.0.6.	Individual Updates	123	USA 2006 Vol 1
7.1.	Adam Systems	123	USA 2006 Vol 1
7.2.	Arkona	123	USA 2006 Vol 1
7.3.	Automotive Computer Services - ACS	124	USA 2006 Vol 1
7.4.	Auto/Mate	125	USA 2006 Vol 1
7.5.	AutoSoft International - ASI	125	USA 2006 Vol 1
7.6.	DPC Systems	125	USA 2006 Vol 1
7.7	Dubuque Data Services	126	USA 2006 Vol 1
7.8.	Jarvis Computer Software	126	USA 2006 Vol 1
7.9.	MPK Automotive	126	USA 2006 Vol 1
7.10.	NeoSynergy	127	USA 2006 Vol 1
7.11.	PBS Financial	127	USA 2006 Vol 1
7.12.	Procede Software	128	USA 2006 Vol 1
7.13.	Quorum	128	USA 2006 Vol 1
7.13.1.	Microsoft "Strategic Partner"	128	USA 2006 Vol 1
7.13.2.	Comment on MS and Quorum	128	USA 2006 Vol 1
7.14.	Systems 2000	128	USA 2006 Vol 1
7.15.	DSPs not in the Charts	129	USA 2006 Vol 1
7.15.1.	AFS Information Systems	129	USA 2006 Vol 1
7.15.2.	Karmak	129	USA 2006 Vol 1
7.15.3.	Lightyear Dealer Technologies	130	USA 2006 Vol 1
7.15.4.	Rapid Systems	130	USA 2006 Vol 1
8	Specialist DSPs	131	USA 2006 Vol 1
8.0.1.	A complex sector to monitor	130	USA 2006 Vol 1
8.0.2.	The main changes	130	USA 2006 Vol 1
8.1.	Specialist DSPs - the List	132	USA 2006 Vol 1
	Figure 8.1.1. Specialist DSPs - Categories	133	USA 2006 Vol 1
8.2.	Individual updates	134	USA 2006 Vol 1
8.2.1.	Cobalt	135	USA 2006 Vol 1
8.2.1.1.	Business Structure	135	USA 2006 Vol 1
8.2.1.2.	A background clarification	135	USA 2006 Vol 1
	Figure 8.2.1.1. Cobalt's 4 Divisions	135	USA 2006 Vol 1
	Figure 8.2.1.2. Cobalt's positions in the "Advertising-to-Sale Funnel"	136	USA 2006 Vol 1
8.2.1.3.	Direction of development	136	USA 2006 Vol 1
8.2.1.4.	Web sites	137	USA 2006 Vol 1
8.2.1.5.	Power Search Complete	137	USA 2006 Vol 1
8.2.1.6.	Dealix	138	USA 2006 Vol 1
8.2.1.7.	Procure	138	USA 2006 Vol 1
8.2.1.8.	Lead Manager	138	USA 2006 Vol 1
8.2.1.9.	"CRM" - Prospector	138	USA 2006 Vol 1
8.2.1.10.	Integralink and GAIN	138	USA 2006 Vol 1
8.2.1.11.	The Parts business	139	USA 2006 Vol 1
8.2.2.	ProQuest PBS	140	USA 2006 Vol 1
8.2.2.1.	PBS direction - before Snap-on	140	USA 2006 Vol 1
8.2.2.2.	Snap-on Tools - background	140	USA 2006 Vol 1
	Figure 8.2.2. Snap-on Revenues	141	USA 2006 Vol 1

Section	Section Heading	Page	Document short title
8.2.2.3.	How ProQuest PBS fits in	141	USA 2006 Vol 1
8.2.3	Advent Resources	143	USA 2006 Vol 1
	Figure 8.2.3. Advent's F&I Express "Hub"	143	USA 2006 Vol 1
8.2.4	CIMA Systems	144	USA 2006 Vol 1
8.2.5	dbDirect	144	USA 2006 Vol 1
8.2.6	Fresh Beginnings eLead	145	USA 2006 Vol 1
8.2.7	iMagicLab	145	USA 2006 Vol 1
8.2.8	JMSolutions	146	USA 2006 Vol 1
8.2.9	Maxim Automotive	147	USA 2006 Vol 1
8.2.10.	MPIfix	147	USA 2006 Vol 1
8.2.11.	NCompass	149	USA 2006 Vol 1
8.2.12.	ReckonUp	149	USA 2006 Vol 1
8.2.13.	VinPlus	149	USA 2006 Vol 1
8.2.14	Vehicle Inventory Systems	150	USA 2006 Vol 1
8.2.14.1.	Used Vehicles	150	USA 2006 Vol 1
8.2.14.2.	New Vehicles	150	USA 2006 Vol 1
	Volume 2 - Topics covered	1	USA 2006 Vol 2
1	Dealer-related developments in context	2	USA 2006 Vol 2
1.1.	OEM influences	2	USA 2006 Vol 2
1.1.1.	Co-operative projects involving DMS and "front-end" systems	2	USA 2006 Vol 2
1.2.	Dealer Group projects	3	USA 2006 Vol 2
1.2.1.	AutoNation	3	USA 2006 Vol 2
1.2.2.	United Auto Group	3	USA 2006 Vol 2
1.3.	Five interesting Dealer situations	3	USA 2006 Vol 2
1.4.	Geographic distribution	4	USA 2006 Vol 2
2.1.	General Motors - DMS & Lead Management - IDMS and OneSource	5	USA 2006 Vol 2
2.1.4.	Saturn's new DMS	8	USA 2006 Vol 2
2.1.5.	IDMS Project	8	USA 2006 Vol 2
2.1.6.	OneSource Project	10	USA 2006 Vol 2
2.1.8.	Review of Quorum Xsellerator	11	USA 2006 Vol 2
2.2.	Toyota Canada's "RIMS" and "CustomerOne" projects	12	USA 2006 Vol 2
2.2.8	Heffner Toyota-Lexus - Kitchener (Ontario) - R&R ERA and SCI Napoleon	23	USA 2006 Vol 2
2.2.9.	Brimell Toyota - Scarborough (Ontario) - R&R ERA and CM	26	USA 2006 Vol 2
3.1.	AutoNation - Continuing evolution in the Showroom	31	USA 2006 Vol 2
3.2.	United Auto Group (UAG) Working with R&R as its primary IT Partner	38	USA 2006 Vol 2
4.1.	Hawkinson Nissan - user of ADP's WEB2005 with WEBCRM and IP Phones	45	USA 2006 Vol 2
4.2.	Aloia's Folsom Lake Nissan - Sacramento - A test-bed for 5Square.com	49	USA 2006 Vol 2
4.3.	Galpin - North Hills, California - ser of ADP (DSi) CARman & Specialist systems	52	USA 2006 Vol 2
4.4.	JM Lexus - Margate, Florida - A large-scale user of R&R ERA and other systems	57	USA 2006 Vol 2
4.5.	Brian Finch Pontiac Buick - London, Ontario - Canada - Quorum's Xsellerator	61	USA 2006 Vol 2
1	Introduction to Specialists	2	Euro 2006 Specialists
1.1.	Europe compared with North America	2	Euro 2006 Specialists
1.2.	Changes are in progress	2	Euro 2006 Specialists
1.3.	DMS providers also active	3	Euro 2006 Specialists
1.4.	The "one stop shop"	3	Euro 2006 Specialists
1.5.	On-line Parts specialists	3	Euro 2006 Specialists
1.6.	Expected to be a battleground	3	Euro 2006 Specialists
2	Individual Specialist Dealer Systems Providers	4	Euro 2006 Specialists
	Figure 2.1. Some of the areas covered by "Specialist" DSPs	5	Euro 2006 Specialists
2.1.	2nd Byte - UK	6	Euro 2006 Specialists
2.1.1.	Background to 2nd Byte	6	Euro 2006 Specialists
2.1.2.	Product range... Remarketing	6	Euro 2006 Specialists
	Figure 2.1.1. Overview of the 2nd Byte Remarketing Services	7	Euro 2006 Specialists
2.1.2.1.	Latest remarketing addition	8	Euro 2006 Specialists
2.1.2.2.	Customer base	8	Euro 2006 Specialists
2.1.3.	New Products related to...Advertising & Call Response performance	8	Euro 2006 Specialists
2.1.3.1.	Calls2Account functions	8	Euro 2006 Specialists
	Figure 2.1.2. 2nd Byte's Calls2Account	9	Euro 2006 Specialists
2.1.3.2.	Comment on Calls2Account	9	Euro 2006 Specialists
2.1.4.	The next step - TrackBack	9	Euro 2006 Specialists
	Figure 2.1.3. 2nd Byte's Calls2Account Graphic Sales Aids & Reports	10	Euro 2006 Specialists
2.1.4.1.	Control for OEMs	11	Euro 2006 Specialists
2.1.4.2.	Method of operation - e-mails	11	Euro 2006 Specialists
2.1.4.3.	Method of operation - telephone	11	Euro 2006 Specialists
2.1.4.4.	Comment on TrackBack	11	Euro 2006 Specialists
2.2.	Audatex - Europe	12	Euro 2006 Specialists
2.2.1.	Background to Audatex	12	Euro 2006 Specialists
2.2.2.	Product range	12	Euro 2006 Specialists
2.2.3.	Comment on Audatex	12	Euro 2006 Specialists
2.3.	ADP Dealer Services Contact, Exchange & CubeWare - Europe	13	Euro 2006 Specialists
2.3.1.	Background to ADP Dealer Services	13	Euro 2006 Specialists
2.3.2.	Specialist product strategy	13	Euro 2006 Specialists

Section	Section Heading	Page	Document short title
2.3.2.1.	The three systems	13	Euro 2006 Specialists
2.3.3.	Comment on ADP	13	Euro 2006 Specialists
2.4.	L'Argus and Planet VO - France	14	Euro 2006 Specialists
2.4.1.	L'Argus data services	14	Euro 2006 Specialists
2.4.2.	Planet VO	14	Euro 2006 Specialists
2.4.2.1.	Stock Valuations	14	Euro 2006 Specialists
2.4.2.2.	Group Services	14	Euro 2006 Specialists
2.4.3.	Comment	14	Euro 2006 Specialists
2.5.	Audev CarIT-CRM - Netherlands	15	Euro 2006 Specialists
2.5.1.	Background to Audev	15	Euro 2006 Specialists
2.5.2.	The Specialist system	15	Euro 2006 Specialists
2.5.3.	Audev's Partners	15	Euro 2006 Specialists
2.5.3.1.	Partners outside Europe	15	Euro 2006 Specialists
2.5.4.	Comment on Audev	15	Euro 2006 Specialists
2.6.	AutoScout24 - multi-country	16	Euro 2006 Specialists
2.6.1.	Brief overview	16	Euro 2006 Specialists
2.6.2.	Joined with FairCar	16	Euro 2006 Specialists
2.6.3.	Comment	16	Euro 2006 Specialists
2.7.	CAP - UK	17	Euro 2006 Specialists
2.7.1.	Background to CAP	17	Euro 2006 Specialists
2.7.2.	Product range	17	Euro 2006 Specialists
2.7.3.	Comment on CAP	17	Euro 2006 Specialists
2.8.	Carmeile - Germany	18	Euro 2006 Specialists
2.8.1.	Carmeile's systems business	18	Euro 2006 Specialists
2.8.2.	On-line vehicle sales	18	Euro 2006 Specialists
2.8.3.	Dealer software developments	18	Euro 2006 Specialists
2.8.3.1.	CSS objective and functions	18	Euro 2006 Specialists
2.8.3.2.	CSS tailoring	18	Euro 2006 Specialists
2.8.4.	The first "outside" user	18	Euro 2006 Specialists
2.9.	CarTV - Germany	19	Euro 2006 Specialists
2.9.1.	Overview of CarTV	19	Euro 2006 Specialists
2.9.2.	Other functions	19	Euro 2006 Specialists
2.10.	Contact Advantage - UK	20	Euro 2006 Specialists
2.10.1.	Background to Contact Advantage	20	Euro 2006 Specialists
2.10.2	Customer base	20	Euro 2006 Specialists
	Figure 2.10.1. Two screen images from CA:Automotive	21	Euro 2006 Specialists
2.10.3.	CA:Automotive - Functions	22	Euro 2006 Specialists
2.10.3.1.	External systems & data	22	Euro 2006 Specialists
2.10.3.2.	"Compliance"	23	Euro 2006 Specialists
2.10.3.3.	DMS integration	23	Euro 2006 Specialists
2.10.4.	CA:Automotive IT Platform	24	Euro 2006 Specialists
2.10.5.	Pricing	24	Euro 2006 Specialists
2.10.6.	Comment on CA:Automotive	24	Euro 2006 Specialists
2.11.	D'Arva - France	25	Euro 2006 Specialists
2.11.1.	Background to D'Arva	25	Euro 2006 Specialists
2.11.2.	D'Arva's operations	25	Euro 2006 Specialists
2.11.3.	Impact on DSPs	25	Euro 2006 Specialists
2.11.4.	Comment	25	Euro 2006 Specialists
2.12.	DAT - based in Germany	26	Euro 2006 Specialists
2.12.1.	Overview of DAT	26	Euro 2006 Specialists
2.12.2.	Products	26	Euro 2006 Specialists
2.12.2.1.	Used vehicles	26	Euro 2006 Specialists
2.12.2.2.	Collision repair	26	Euro 2006 Specialists
2.12.2.3.	New vehicle specifications & mechanical repair estimating	26	Euro 2006 Specialists
2.12.3.	Comment	26	Euro 2006 Specialists
2.13.	DCS Automotive (now R&R) - Showroom - UK	26	Euro 2006 Specialists
2.14.	Ebbon-Dacs - UK	27	Euro 2006 Specialists
2.14.1.	Background to Ebbon-Dacs	27	Euro 2006 Specialists
2.14.2.	Specialist systems & services	27	Euro 2006 Specialists
2.14.2.1.	Lead Management software	28	Euro 2006 Specialists
2.14.2.	Comment	28	Euro 2006 Specialists
2.15.	e-GoodManners - GoodManners Ltd - UK	29	Euro 2006 Specialists
2.15.1.	Background to GoodManners	29	Euro 2006 Specialists
2.15.2.	The product	29	Euro 2006 Specialists
2.15.2.1.	GoodManners	29	Euro 2006 Specialists
2.15.2.2.	e-GoodManners	29	Euro 2006 Specialists
2.15.2.3.	The basics of e-GoodManners	30	Euro 2006 Specialists
	Figure 2.15.1. e-GM Reception Data Capture Screen	30	Euro 2006 Specialists
	Figure 2.15.2. e-GM Reception Log screen	31	Euro 2006 Specialists
	Figure 2.15.3. e-GM Customer Appraisal Form - "Top" screen	32	Euro 2006 Specialists
	Figure 2.15.4. e-GM Customer Appraisal Form - "Bottom" screen	32	Euro 2006 Specialists
	Figure 2.15.5. e-GM Sales Executive Diary page	33	Euro 2006 Specialists

Section	Section Heading	Page	Document short title
2.15.3.	OEM relationships - VW UK	33	Euro 2006 Specialists
2.15.3.1.	Additional software	33	Euro 2006 Specialists
2.15.3.2.	Other OEM relationships	33	Euro 2006 Specialists
2.15.4	A Fleet version	33	Euro 2006 Specialists
	Figure 2.15.6. e-GM Sales Manager's homepage	34	Euro 2006 Specialists
	Figure 2.15.7. e-GM Sales Manager's tools options	34	Euro 2006 Specialists
	Figure 2.15.8. e-GM sample management report	35	Euro 2006 Specialists
2.15.5.	Cost indications	35	Euro 2006 Specialists
2.15.6.	Integration	35	Euro 2006 Specialists
2.15.7	Comment	35	Euro 2006 Specialists
2.16.	Epyx - UK	36	Euro 2006 Specialists
2.16.1.	Backgroud to Epyx	36	Euro 2006 Specialists
2.16.2.	Service Network	36	Euro 2006 Specialists
2.16.3.	The other 1Link services	36	Euro 2006 Specialists
2.16.4.	Comment	36	Euro 2006 Specialists
2.17.	EuroTax Glass's - Multi-national in Europe	37	Euro 2006 Specialists
2.17.1.	Background to EuroTax Glass's	37	Euro 2006 Specialists
2.17.2.	Services for OEMs	37	Euro 2006 Specialists
2.17.3.	Partnership with Werbas	37	Euro 2006 Specialists
2.17.4.	Comment	37	Euro 2006 Specialists
2.18.	Experian - UK	38	Euro 2006 Specialists
2.18.1.	Background to Experian	38	Euro 2006 Specialists
2.18.2.	Experian Automotive	38	Euro 2006 Specialists
2.18.2.1.	A hard market	38	Euro 2006 Specialists
2.18.2.2.	Dirty data	38	Euro 2006 Specialists
2.18.3.	The Data Cleansing Business	39	Euro 2006 Specialists
2.18.3.1.	Extraction techniques	39	Euro 2006 Specialists
2.18.3.2.	Reference databases used	39	Euro 2006 Specialists
2.18.3.3.	A tailored service	39	Euro 2006 Specialists
2.18.4.	Points of note	39	Euro 2006 Specialists
	Figure 2.18.1. Overview of Experian's Data Cleansing Service	40	Euro 2006 Specialists
2.18.5.	Customer base	41	Euro 2006 Specialists
2.18.6.	Comment	41	Euro 2006 Specialists
2.19.	Fastrack - UK	42	Euro 2006 Specialists
2.19.1.	Background to Fastrack	42	Euro 2006 Specialists
2.19.1.1.	OEM influence	42	Euro 2006 Specialists
2.19.2.	The system	42	Euro 2006 Specialists
2.19.2.1.	Fastrack modules	42	Euro 2006 Specialists
2.19.3.	OEM connections	43	Euro 2006 Specialists
	Figure 2.19.1. Screen images from Fastrack's Sales Workstation	44	Euro 2006 Specialists
2.19.4.	DMS integration	44	Euro 2006 Specialists
2.19.5.	Delivery options	45	Euro 2006 Specialists
2.19.6.	Comment on Fastrack	45	Euro 2006 Specialists
2.20.	Global Beach - UK (and USA)	46	Euro 2006 Specialists
2.20.1.	Background to Global Beach	46	Euro 2006 Specialists
2.20.2.	Products and Services	46	Euro 2006 Specialists
2.20.3.	Customers	46	Euro 2006 Specialists
2.20.4.	Comment	46	Euro 2006 Specialists
2.21.	HPI - UK	47	Euro 2006 Specialists
2.21.1.	Background to HPI	47	Euro 2006 Specialists
2.21.2.	Norwich Union - owner of HPI	47	Euro 2006 Specialists
2.21.3.	Comment on HPI	47	Euro 2006 Specialists
2.22.	Jato Dynamics - UK based multi-national	48	Euro 2006 Specialists
2.22.1.	Background to Jato Dynamics	48	Euro 2006 Specialists
2.22.2.	Products	48	Euro 2006 Specialists
2.22.3.	Customer base	48	Euro 2006 Specialists
2.22.4.	Comment	48	Euro 2006 Specialists
2.23.	Mobile.de - Germany (Owned by eBay)	49	Euro 2006 Specialists
2.23.1.	Background to Mobile.de	49	Euro 2006 Specialists
2.23.2.	The Mobile.de business	49	Euro 2006 Specialists
2.23.3.	Comment	49	Euro 2006 Specialists
2.24.	Portfolio Europe - UK (owned by Manheim)	50	Euro 2006 Specialists
2.24.1.	Background to Portfolio	50	Euro 2006 Specialists
2.24.2.	Products	50	Euro 2006 Specialists
2.24.3.	Customer base	50	Euro 2006 Specialists
2.24.4.	International expansion	50	Euro 2006 Specialists
2.24.5.	Comment	50	Euro 2006 Specialists
2.25.	ProQuest Alison - UK and other countries	51	Euro 2006 Specialists
2.25.1.	Background to ProQuest Alison	51	Euro 2006 Specialists
2.25.2.	Services and Customers	51	Euro 2006 Specialists
2.25.3.	DMS interfaces	51	Euro 2006 Specialists
2.25.4.	Comment	51	Euro 2006 Specialists

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
2.26	q-bit Systems - UK	52	Euro 2006 Specialists
2.26.1	Background to q-bit	52	Euro 2006 Specialists
2.26.2.	Products and services	52	Euro 2006 Specialists
2.26.2.1.	Web2Office	52	Euro 2006 Specialists
2.26.2.2.	Relationship with DMS	52	Euro 2006 Specialists
2.26.3.	Customer base	52	Euro 2006 Specialists
2.26.4.	Costs	53	Euro 2006 Specialists
2.26.5.	Comment	53	Euro 2006 Specialists
2.27.	RPMcar - Netherlands	54	Euro 2006 Specialists
2.27.1.	Background to RPMcar	54	Euro 2006 Specialists
2.27.1.1.	Initial launch - Version 1	54	Euro 2006 Specialists
2.27.2.	System functions	55	Euro 2006 Specialists
2.27.3.	DMS integration	55	Euro 2006 Specialists
2.27.4.	Costs and returns	56	Euro 2006 Specialists
2.27.5.	Customer base	56	Euro 2006 Specialists
2.27.6.	Comment	56	Euro 2006 Specialists
2.28.	Real Time Communications (RTC) - UK	57	Euro 2006 Specialists
2.28.1.	Background to RTC	57	Euro 2006 Specialists
2.28.2.	Partnership with Shell Oil	57	Euro 2006 Specialists
2.28.3.	Customer base	57	Euro 2006 Specialists
2.28.4.	The system - overview of the "IT"	57	Euro 2006 Specialists
	Figure 2.28.1. Overview of the RTC - Shell Connect	58	Euro 2006 Specialists
2.28.5.	DMS integration	59	Euro 2006 Specialists
2.28.6.	The system - functions	59	Euro 2006 Specialists
2.28.7.	The system - installation	60	Euro 2006 Specialists
2.28.8.	More details about Connect	60	Euro 2006 Specialists
2.28.8.1.	Call Centres	60	Euro 2006 Specialists
	Figure 2.28.2. Example screen displays from RTC Shell Connect	61	Euro 2006 Specialists
2.28.8.2.	Third Party integration	62	Euro 2006 Specialists
2.28.8.3.	"Workshop Control"	62	Euro 2006 Specialists
2.28.9.	DMS Types supported	62	Euro 2006 Specialists
2.28.10.	Pricing	62	Euro 2006 Specialists
2.28.11.	Comment on RTC-Shell Connect	62	Euro 2006 Specialists
2.29.	Select'UP - France	63	Euro 2006 Specialists
2.29.1.	Background to Select'UP	63	Euro 2006 Specialists
2.29.2.	The Product	63	Euro 2006 Specialists
2.29.3.	Customer base	63	Euro 2006 Specialists
2.29.4.	Comment	63	Euro 2006 Specialists
2.30.	Summit Auto Group - Germany	64	Euro 2006 Specialists
2.30.1.	Background to Summit Auto	64	Euro 2006 Specialists
2.30.2.	The Service	64	Euro 2006 Specialists
2.30.2.1.	The business process	64	Euro 2006 Specialists
2.30.2.2.	Development Partners	64	Euro 2006 Specialists
2.30.3.	Comment	64	Euro 2006 Specialists
2.31.	Trader Media Group - UK	65	Euro 2006 Specialists
2.31.1.	Background to Trader Media	65	Euro 2006 Specialists
2.31.2.	The acquired companies...	65	Euro 2006 Specialists
2.31.3.	Future operations	65	Euro 2006 Specialists
2.31.4.	Vehicle Status Check	65	Euro 2006 Specialists
2.31.5.	Comment on Trader Media	66	Euro 2006 Specialists
2.32.	Vector CRM Partner - fmade - Austria	67	Euro 2006 Specialists
2.32.1.	Background to the partnership	67	Euro 2006 Specialists
2.32.2.	Co-operation in the market	67	Euro 2006 Specialists
2.32.3.	Future plans	67	Euro 2006 Specialists
2.32.4.	Comment	67	Euro 2006 Specialists
2.33.	White Clarke Group (WCG) - Multi-national	68	Euro 2006 Specialists
2.33.1.	Background to White Clarke	68	Euro 2006 Specialists
2.33.2.	Product range	68	Euro 2006 Specialists
2.33.3.	Applications	69	Euro 2006 Specialists
2.33.3.1.	Dealer Point-of-sale	69	Euro 2006 Specialists
	Figure 2.33.1 Overview of White Clarke Group's product structure	69	Euro 2006 Specialists
2.33.3.2.	Hand-held applications	70	Euro 2006 Specialists
2.33.3.3.	Finance Company applications	70	Euro 2006 Specialists
2.33.4.	The Integration Hub	70	Euro 2006 Specialists
2.33.5.	Rules (Decision) Engine	70	Euro 2006 Specialists
2.33.6.	Acquisition of Actuate	70	Euro 2006 Specialists
2.33.6.1.	Background to Actuate	70	Euro 2006 Specialists
2.33.6.2.	Products and services	70	Euro 2006 Specialists
2.33.6.3.	DMS integration	71	Euro 2006 Specialists
2.33.6.4.	Costs and values	71	Euro 2006 Specialists
	Figure 2.33.2. A view of the direction of WCG product development	71	Euro 2006 Specialists
2.33.6.5.	Comment on Actuate	72	Euro 2006 Specialists

Section	Section Heading	Page	Document short title
2.33.7.	Comment on WCG	72	Euro 2006 Specialists
2.34	An interesting situation in the Showroom	73	Euro 2006 Specialists
2.34.1.	VW's requirement	73	Euro 2006 Specialists
2.34.2.	Other DSPs in the VW Network	73	Euro 2006 Specialists
2.34.2.1.	Eight technology	73	Euro 2006 Specialists
2.34.2.2.	Complete Automotive Solutions	74	Euro 2006 Specialists
2.34.3.	Implications for VW and others	74	Euro 2006 Specialists
2.34.4.	Implications for DMS providers	74	Euro 2006 Specialists
	Preface	1	International DSPs 2007
1	Definitions of "Global" and "Major Markets"	3	International DSPs 2007
1.1.	Criteria for including DSPs	3	International DSPs 2007
1.2.	Core DMS Applications	3	International DSPs 2007
1.2.1.	Accounting..."core" or not?	3	International DSPs 2007
	Figure 1.1. DSPs with DMS installed in 2 or more Continents	3	International DSPs 2007
1.2.2.	Specialist Applications	4	International DSPs 2007
1.3.	"Major" markets	4	International DSPs 2007
1.4.	A far from static situation	4	International DSPs 2007
	Figure 1.2. A "convenient" division of the Globe into 12 Major Markets/Regions	5	International DSPs 2007
2	Factors affecting Globalisation	6	International DSPs 2007
2.1.	The OEMs, the DSPs, and their customers - the Dealers	6	International DSPs 2007
2.2.	OEM expectations - and complications	6	International DSPs 2007
2.3.	DSP progress towards "Global coverage"	7	International DSPs 2007
2.3.1.	Customer numbers and Markets	7	International DSPs 2007
2.3.2.	The reality of Dealer business	7	International DSPs 2007
2.3.3.	A reality of DSP business	8	International DSPs 2007
2.3.4.	Not always a stable progression	8	International DSPs 2007
2.4.	Is Global standardisation of Dealer systems possible?	8	International DSPs 2007
2.4.1.	Standardisation on a single DMS type	8	International DSPs 2007
2.4.2.	Standardisation on a limited range of DMS types	9	International DSPs 2007
2.4.3.	Handling of Dealers using a "not-recommended" DMS	9	International DSPs 2007
2.5.	Another factor - Legislation	9	International DSPs 2007
3	DSPs operating in multiple Regions - Overview	10	International DSPs 2007
3.1.	"Global DSP" distribution structures	10	International DSPs 2007
3.1.1.	DSPs owned by OEMs	10	International DSPs 2007
	Figure 3.1. The DSPs covered and the Major Markets in which they operate	11	International DSPs 2007
	Figure 3.2. Characteristics of the International DSPs	12	International DSPs 2007
	Figure 3.2.1. Number of Countries with operational DMS	12	International DSPs 2007
	Figure 3.2.2. Estimated Total Dealer Locations	12	International DSPs 2007
	Figure 3.2.3. Estimated Annual Dealer Systems Revenues	12	International DSPs 2007
3.1.2.	The current Global market leader	13	International DSPs 2007
3.1.2.1.	Not a single DMS type ... yet	13	International DSPs 2007
3.1.3.	The "2nd largest" DSP	13	International DSPs 2007
3.1.4.	The large ERP software providers	13	International DSPs 2007
3.1.5.	"Other" multi-Continent DSPs	14	International DSPs 2007
3.1.5.1.	Factors in "consolidation"	14	International DSPs 2007
3.1.6.	The first "Global DMS" ... when?	14	International DSPs 2007
3.1.6.1.	Implications for OEM strategies	14	International DSPs 2007
3.2.	Specialist DSPs operating in multiple Major Markets - Overview	14	International DSPs 2007
3.2.1.	"Global" Specialist DSPs	14	International DSPs 2007
3.2.2.	Electronic Parts Catalogues	14	International DSPs 2007
3.2.3.	Collision Repair	14	International DSPs 2007
3.2.4.	Other Specialists - "CRM"	15	International DSPs 2007
3.2.5.	Specialists in OEM-related services	15	International DSPs 2007
3.2.6.	Specialists - supporting services	15	International DSPs 2007
4	Individual DSPs	15	International DSPs 2007
4.0.1.	Objective	16	International DSPs 2007
4.0.2.	Review headings	16	International DSPs 2007
4.0.3.	Sequence of reviews	16	International DSPs 2007
4.1.	ADP Dealer Services	17	International DSPs 2007
4.1.1.	Background	17	International DSPs 2007
	Figure 4.1.1. ADP's Country coverage and Partners	18	International DSPs 2007
4.1.2.	Product Range	19	International DSPs 2007
4.1.2.1.	North American DMS	19	International DSPs 2007
4.1.2.2.	European DMS	20	International DSPs 2007
4.1.2.3.	"ex-Kerridge" Autoline	21	International DSPs 2007
4.1.2.4.	ADP accounting software	21	International DSPs 2007
4.1.3.	OEM relationships	21	International DSPs 2007
	Figure 4.1.2. ADP Dealer Services - overview of the Global position	22	International DSPs 2007
4.1.3.1.	OEMs - North America	23	International DSPs 2007
4.1.3.2.	OEMs - Europe (excluding Autoline)	23	International DSPs 2007
4.1.3.3.	OEMs - International - Autoline	23	International DSPs 2007
4.1.4.	Dealer relationships	23	International DSPs 2007

Section	Section Heading	Page	Document short title
4.1.5.	Partner relationships	24	International DSPs 2007
4.1.6.	Conclusions and comments	24	International DSPs 2007
4.2.	Arkona - USA	25	International DSPs 2007
4.2.1.	Background	25	International DSPs 2007
4.2.2.	Product range	25	International DSPs 2007
4.2.3.	OEM relationships	25	International DSPs 2007
4.2.4.	Dealer relationships	25	International DSPs 2007
4.2.5.	Conclusions and comments	25	International DSPs 2007
4.3.	ASC - Germany and F+I - Switzerland	26	International DSPs 2007
4.3.1.	Background	26	International DSPs 2007
4.3.2.	Product range	26	International DSPs 2007
4.3.3.	OEM relationships	27	International DSPs 2007
4.3.4.	Dealer relationships	27	International DSPs 2007
4.3.5.	Conclusions and comments	27	International DSPs 2007
4.4.	Audev Holdings BV - Europe, USA and Mexico	28	International DSPs 2007
4.4.1.	Background	28	International DSPs 2007
4.4.2.	Product range	29	International DSPs 2007
4.4.3.	OEM relationships	29	International DSPs 2007
4.4.4.	Dealer relationships	29	International DSPs 2007
4.4.5.	Conclusions and comments	29	International DSPs 2007
4.5.	Auto-IT - Australia	30	International DSPs 2007
4.5.1.	Background	30	International DSPs 2007
4.5.2.	Product range	30	International DSPs 2007
4.5.3.	OEM relationships	31	International DSPs 2007
4.5.4.	Dealer relationships	31	International DSPs 2007
4.5.5.	Conclusions and comments	31	International DSPs 2007
4.6.	Autologica S.A.	32	International DSPs 2007
4.6.1.	Background	32	International DSPs 2007
4.6.2.	Product range	32	International DSPs 2007
4.6.3.	OEM relationships	33	International DSPs 2007
4.6.4.	Dealer relationships	33	International DSPs 2007
4.6.5.	Conclusions and comments	33	International DSPs 2007
4.7.	Automaster - Finland	34	International DSPs 2007
4.7.1.	Background	34	International DSPs 2007
4.7.2.	Product range	35	International DSPs 2007
4.7.3.	OEM relationships	35	International DSPs 2007
4.7.4.	Dealer & Group relationships	36	International DSPs 2007
4.7.5.	Conclusions and comments	37	International DSPs 2007
4.8.	AXIS - Volvo Truck - UK	38	International DSPs 2007
4.8.1.	Background	38	International DSPs 2007
	Figure 4.8.1. Structure of organisations supporting Volvo Truck Dealer systems	39	International DSPs 2007
4.8.2.	Product range	40	International DSPs 2007
4.8.2.1.	Another "light" DMS	40	International DSPs 2007
	Figure 4.8.2. GDS Fusion - Vehicle Management - Sales Tracking screen	41	International DSPs 2007
4.8.2.2.	Sarbanes-Oxley - compliance	41	International DSPs 2007
	Figure 4.8.3. GDS has interfaces to about 40 other Applications	42	International DSPs 2007
4.8.3.	Current status of Fusion	43	International DSPs 2007
4.8.4.	OEM relationships	43	International DSPs 2007
4.8.5.	Dealer relationships	43	International DSPs 2007
	Figure 4.8.4. VT's GDS structure for Importer Parts sales to Workshops	43	International DSPs 2007
4.8.6.	System pricing	44	International DSPs 2007
4.8.7.	Conclusions and comments	44	International DSPs 2007
4.9.	DATAFIRST - France	46	International DSPs 2007
4.9.1.	Background	46	International DSPs 2007
	Figure 4.9.1. DATAFIRST - European coverage	46	International DSPs 2007
	Figure 4.9.2. French DOM TOMs, Morocco, Mozambique and Angola	46	International DSPs 2007
4.9.2.	Product range	47	International DSPs 2007
4.9.3.	OEM relationships	48	International DSPs 2007
4.9.4.	Dealer & Group relationships	48	International DSPs 2007
4.9.5.	Conclusions and comments	48	International DSPs 2007
4.10.	DCS Automotive - part of R&R-UCS	50	International DSPs 2007
4.10.1.	Background	50	International DSPs 2007
	Table 1 DMS types supported by Country	51	International DSPs 2007
4.10.2.	Product range	51	International DSPs 2007
4.10.3.	OEM relationships	52	International DSPs 2007
4.10.4.	Dealer relationships	52	International DSPs 2007
4.10.5.	Conclusions and comments	52	International DSPs 2007
4.11.	Ebbon-Dacs	53	International DSPs 2007
4.11.1.	Background	53	International DSPs 2007
4.11.2.	Product range	53	International DSPs 2007
4.11.3.	OEM relationships	54	International DSPs 2007
4.11.4.	Dealer relationships	54	International DSPs 2007

Section	Section Heading	Page	Document short title
4.11.5.	Conclusions and comments	54	International DSPs 2007
4.12.	IBM - International	55	International DSPs 2007
4.12.1.	Background	55	International DSPs 2007
4.12.2.	DMS project in China	55	International DSPs 2007
4.12.2.1.	The DMS	55	International DSPs 2007
4.12.3.	DMS project for BMW - Germany	56	International DSPs 2007
4.12.4.	Conclusions and comments	56	International DSPs 2007
4.13.	Incadea - current owner is R&R-UCS - USA	57	International DSPs 2007
4.13.1.	Background	57	International DSPs 2007
	Figure 4.13.1. Incadea's Country coverage and Partners	58	International DSPs 2007
4.13.2.	Product range	59	International DSPs 2007
4.13.3.	OEM relationships	59	International DSPs 2007
4.13.4.	Dealer relationships	59	International DSPs 2007
4.13.5.	Conclusions and comments	59	International DSPs 2007
4.13.5.1.	Several multi-national Partners	60	International DSPs 2007
4.13.5.2.	OEM frustrations	60	International DSPs 2007
4.13.5.3.	A need for resolution	60	International DSPs 2007
4.14.	Micrauto - France	61	International DSPs 2007
4.14.1.	Background	61	International DSPs 2007
4.14.2.	Product range	61	International DSPs 2007
4.14.3.	OEM relationships	61	International DSPs 2007
4.14.4.	Dealer relationships	62	International DSPs 2007
4.14.5.	Conclusions and comments	62	International DSPs 2007
4.15.	Microsoft - USA, and Infonizer - Denmark	63	International DSPs 2007
	Figure 4.15.1. Microsoft in the DMS business	64	International DSPs 2007
4.15.1.	Background	65	International DSPs 2007
4.15.1.1.	Microsoft's DMS Organisation	65	International DSPs 2007
4.15.1.2.	MBS - links to other DSPs	65	International DSPs 2007
4.15.1.2.	Infonizer's Organisation	66	International DSPs 2007
	Figure 4.15.2 Nelleman, Infonizer, Partners and Customers - overview	67	International DSPs 2007
4.15.2.	Infonizer's Partners	68	International DSPs 2007
4.15.3.	Microsoft's Partner activity	69	International DSPs 2007
4.15.3.1.	Microsoft's Automotive Retail Solutions Program - NADA 2007	69	International DSPs 2007
4.15.4.	The product	69	International DSPs 2007
4.15.5.	Conclusions and comments	71	International DSPs 2007
4.15.6.	Microsoft's Automotive Retail Solutions Program - February 2007	72	International DSPs 2007
4.15.6.1.	Relationships with Partners	72	International DSPs 2007
	Figure 4.15.3. The "MS DMS"	72	International DSPs 2007
	Figure 4.15.4. Microsoft's North American Partner Structure	73	International DSPs 2007
4.15.6.2.	DMS positions in the market	74	International DSPs 2007
4.15.6.3.	Comment	74	International DSPs 2007
4.16.	Quiter - Spain	75	International DSPs 2007
4.16.1.	Background	75	International DSPs 2007
4.16.2.	Product range	75	International DSPs 2007
4.16.3.	OEM relationships	75	International DSPs 2007
4.16.4.	Dealer relationships	75	International DSPs 2007
4.16.5.	Conclusions and comments	75	International DSPs 2007
4.17.	R&R-UCS - USA	76	International DSPs 2007
4.17.1.	Background	76	International DSPs 2007
4.17.2.	Product range	77	International DSPs 2007
4.17.3.	OEM relationships	77	International DSPs 2007
4.17.4.	Dealer relationships	77	International DSPs 2007
4.17.5.	Conclusions and comments	77	International DSPs 2007
4.18.	Reynolds & Reynolds Pty Ltd - Asia-Pacific	79	International DSPs 2007
4.18.1.	Background	79	International DSPs 2007
4.18.2.	Product range	79	International DSPs 2007
	Figure 4.18.1. Product Outline - Importer and Distribution Systems	80	International DSPs 2007
4.18.3.	OEM relationships	80	International DSPs 2007
4.18.4.	Dealer relationships	80	International DSPs 2007
4.18.5.	Conclusions and comments	80	International DSPs 2007
4.19.	Regie + MAI + BATINIX = Group IRIUM based in France	82	International DSPs 2007
4.19.1.	Background	82	International DSPs 2007
4.19.2.	Product range	82	International DSPs 2007
4.19.3.	OEM relationships	83	International DSPs 2007
4.19.4.	Dealer relationships	83	International DSPs 2007
4.19.5.	Conclusions and comments	83	International DSPs 2007
4.20.	SAP - Germany	84	International DSPs 2007
4.20.1.	Background	84	International DSPs 2007
4.20.2.	Product range	85	International DSPs 2007
4.20.3.	OEM relationships	86	International DSPs 2007
4.20.4.	Dealer relationships	86	International DSPs 2007
4.20.5.	Conclusions and comments	86	International DSPs 2007

Section	Section Heading	Page	Document short title
4.21.	T-Systems (including gedas) - Germany	87	International DSPs 2007
4.21.1.	Background	87	International DSPs 2007
4.21.2.	Product range	87	International DSPs 2007
	Table 1 DMS types supported by Country	88	International DSPs 2007
4.21.3.	OEM relationships	88	International DSPs 2007
4.21.4.	Dealer relationships	88	International DSPs 2007
4.21.5.	Conclusions and comments	89	International DSPs 2007
4.22.	Werbas - Germany	90	International DSPs 2007
4.22.1.	Background	90	International DSPs 2007
4.22.2.	Product range	90	International DSPs 2007
4.22.3.	OEM relationships	91	International DSPs 2007
4.22.4.	Dealer relationships	91	International DSPs 2007
4.22.5.	Conclusions and comments	91	International DSPs 2007
4.23	Four other, varied, International DSPs	92	International DSPs 2007
4.23.1	CCS Agresso - Spain	92	International DSPs 2007
4.23.2.	Everlog and Select'up - France	93	International DSPs 2007
4.23.3.	IBS Automotive - International	93	International DSPs 2007
4.23.4.	Infosys Technologies Ltd.	94	International DSPs 2007
4.24.	International Specialist DSPs	95	International DSPs 2007
4.24.1.	EPC/TIS Providers - Infomedia, LexCom & Snap-on Business Solutions	95	International DSPs 2007
4.24.2.	EuroTax Glass's - based in Europe	95	International DSPs 2007
5	OEM Global Strategies - Daimler Chrysler	97	International DSPs 2007
5.1.	The original plan	97	International DSPs 2007
5.2.	Implementation of Autoline	97	International DSPs 2007
5.2.1.	The variety of situations	97	International DSPs 2007
5.2.2.	Asia-Pacific region	97	International DSPs 2007
5.2.3.	Europe	98	International DSPs 2007
5.2.4.	Other regions	98	International DSPs 2007
5.3.	Conclusions and comments	99	International DSPs 2007
	A continuing series of Analyses	1	Euro-Italy 2007
	Update on Italy	1	Euro-Italy 2007
	An Update on the EU	2	Euro-Italy 2007
1	Market Overview	3	Euro-Italy 2007
1.1.	Italy in Europe	3	Euro-Italy 2007
	Figure 1.1. Italy in Europe	3	Euro-Italy 2007
1.2.	The Dealer Systems business	4	Euro-Italy 2007
1.2.1.	Some "own systems"	4	Euro-Italy 2007
1.2.2.	OEMs as DMS providers	4	Euro-Italy 2007
1.2.3.	Specialist systems	4	Euro-Italy 2007
1.3.	Dealers & Groups	4	Euro-Italy 2007
1.4.	The OEMs	5	Euro-Italy 2007
	Figure 1.2. OEM Sales Locations, Market Share, Average Dealer Sales	5	Euro-Italy 2007
1.4.1.	OEMs which operate as "DSPs"	6	Euro-Italy 2007
1.4.2.	OEMs which "recommend" DSPs	6	Euro-Italy 2007
1.4.3.	The Fiat family	6	Euro-Italy 2007
1.4.4.	The "integration" trend	6	Euro-Italy 2007
1.4.5.	Not quite a battle	6	Euro-Italy 2007
2	Italian OEMs	7	Euro-Italy 2007
2.1.	Fiat Auto	7	Euro-Italy 2007
2.1.1.	Overview of Fiat Group Automobiles	7	Euro-Italy 2007
2.1.2.	DMS Strategy	7	Euro-Italy 2007
2.1.2.1.	The desire to minimise DMS variety	7	Euro-Italy 2007
2.1.2.2.	European level DMS policy	8	Euro-Italy 2007
2.1.2.3.	Two DMS types per Country	8	Euro-Italy 2007
2.1.2.4.	Co-operation with other DSPs	8	Euro-Italy 2007
2.1.2.5.	Levels of integration	8	Euro-Italy 2007
2.1.3.	DCS and OEM Applications Strategy	8	Euro-Italy 2007
	Figure 2.1. Fiat Auto - eSales application	9	Euro-Italy 2007
2.1.3.1.	The eSales application - overview	10	Euro-Italy 2007
2.1.3.2.	eSales application - more detail	10	Euro-Italy 2007
2.1.3.3.	The eSales application - in operation	10	Euro-Italy 2007
2.1.3.4.	The process, not the tool	10	Euro-Italy 2007
2.1.3.5.	eSales - Operational experience	11	Euro-Italy 2007
2.1.3.6.	eSales - planned extensions	11	Euro-Italy 2007
2.1.3.7.	eSales - Fiat access to data	11	Euro-Italy 2007
2.1.4.	The eService application	11	Euro-Italy 2007
2.1.4.1.	Comment on eService	12	Euro-Italy 2007
2.1.5.	Comment on Fiat Group Automobiles	12	Euro-Italy 2007
	A more subjective comment on the new Fiat	12	Euro-Italy 2007
2.2.	Iveco Truck	13	Euro-Italy 2007
2.2.1.	Complications of the Truck business	13	Euro-Italy 2007
2.2.1.1.	The cost of break-downs	13	Euro-Italy 2007

Section	Section Heading	Page	Document short title
2.2.1.2.	Specific configurations	13	Euro-Italy 2007
2.2.1.4.	Call Centre orientation	13	Euro-Italy 2007
2.2.1.5.	Systems implications	14	Euro-Italy 2007
2.2.2.	Iveco Dealer Systems Strategy	14	Euro-Italy 2007
2.2.3.	Iveco's DCS	14	Euro-Italy 2007
	Figure 2.2. Iveco DCS Conversion	15	Euro-Italy 2007
2.2.3.1.	Simplification	16	Euro-Italy 2007
2.2.4.	Iveco's DMS policy	16	Euro-Italy 2007
2.2.4.1.	Comment on DMS for Trucks	16	Euro-Italy 2007
2.2.5.	Comment on Iveco	16	Euro-Italy 2007
3	Dealer Groups	17	Euro-Italy 2007
	Figure 3.1. Comparison of Top 10 Dealer Groups in Europe - 2003	17	Euro-Italy 2007
	Figure 3.2. Market share of Top 50 Dealer Groups 2001-2003	17	Euro-Italy 2007
	Figure 3.3. 38 of the Top 50 Italian Dealer Groups	18	Euro-Italy 2007
3.1.	Italian Groups and their Systems	18	Euro-Italy 2007
3.1.1.	Not all Groups are "centralised"	18	Euro-Italy 2007
3.1.2.	A time of opportunity for DSPs	18	Euro-Italy 2007
3.2.	Autocity and the Barchetti Group - Bolzano	19	Euro-Italy 2007
3.2.1.	Autocity - 10 Brands in one Location	19	Euro-Italy 2007
3.2.2.	OEMs "cautious"	19	Euro-Italy 2007
3.2.3.	Shared systems	19	Euro-Italy 2007
3.2.3.1.	Own IT Organisation... a "DSP"	20	Euro-Italy 2007
3.2.3.2.	A variety of systems	21	Euro-Italy 2007
3.2.3.3.	Common access to all systems	21	Euro-Italy 2007
3.2.3.4.	Other applications	21	Euro-Italy 2007
3.2.3.5.	Low cost of ownership	21	Euro-Italy 2007
3.2.4.	Comment on Barchetti Group	21	Euro-Italy 2007
3.3.	Gruppcar - Brescia	22	Euro-Italy 2007
3.3.1.	Sales and Service separate	22	Euro-Italy 2007
3.3.2.	Operational experiences	22	Euro-Italy 2007
3.3.2.1.	Giving customers what they want	22	Euro-Italy 2007
3.3.3.	Gruppcar's DMS	23	Euro-Italy 2007
3.3.4.	Gruppcar's other systems	23	Euro-Italy 2007
3.3.5.	Comment on Gruppcar	23	Euro-Italy 2007
3.4.	Car World Italia - Milan	24	Euro-Italy 2007
3.4.1.	Background to the business	24	Euro-Italy 2007
3.4.2.	Business developments	25	Euro-Italy 2007
3.4.2.1.	Administration	25	Euro-Italy 2007
3.4.2.2.	Customer contact management	25	Euro-Italy 2007
3.4.3.	The Group's systems	25	Euro-Italy 2007
3.4.4.	Comment	25	Euro-Italy 2007
4	The on-line Parts Business in Italy - An update on PartsPartner	26	Euro-Italy 2007
4.1.	Background	26	Euro-Italy 2007
4.2.	"On Target"	26	Euro-Italy 2007
4.3.	Costs	26	Euro-Italy 2007
4.4.	Repairer activity	26	Euro-Italy 2007
4.5.	Dealer inventory access	26	Euro-Italy 2007
4.6.	OEMs in PartsPartner	27	Euro-Italy 2007
4.7.	An "upgraded" business model	27	Euro-Italy 2007
	Figure 4.1. Area of operations for AsConAuto	27	Euro-Italy 2007
4.7.1.	More about the "upgrade"	27	Euro-Italy 2007
4.7.2.	Further co-operation	28	Euro-Italy 2007
4.7.3.	One performance analysis	28	Euro-Italy 2007
4.8.	Future expansion	28	Euro-Italy 2007
4.9.	Comment on PartsPartner	28	Euro-Italy 2007
5	DSPs in Italy - a brief overview	29	Euro-Italy 2007
5.1.	The situation until the end of 2005	29	Euro-Italy 2007
5.2.	Changes since the beginning of 2006	29	Euro-Italy 2007
5.3.	Comment on developments in 2007	30	Euro-Italy 2007
6	Two main topics	31	Euro-Italy 2007
6.1.	Developments in the market since April	31	Euro-Italy 2007
6.1.1.	Impact on Italy	31	Euro-Italy 2007
6.2.	Multi-Brand operation	31	Euro-Italy 2007
6.3.	Dealer inertia	31	Euro-Italy 2007
6.4.	Three very different situations	32	Euro-Italy 2007
7	Dealer Systems in Italy	33	Euro-Italy 2007
7.1.	The DMS providers - an overview	33	Euro-Italy 2007
7.1.1.	Assessing "Market Shares"	33	Euro-Italy 2007
7.1.2.	The smaller DSPs... "Tier 2"	33	Euro-Italy 2007
7.1.2.1.	Recent changes in "Tier 2"	34	Euro-Italy 2007
7.1.3.	Importance of OEM recommendations	34	Euro-Italy 2007
7.1.4.	Relative positions	34	Euro-Italy 2007

Section	Section Heading	Page	Document short title
7.1.5.	Specialist DSPs	35	Euro-Italy 2007
7.1.6.	Individual reviews of DSPs	35	Euro-Italy 2007
	Figure 7.1. Relative positions of Italian DMS providers	35	Euro-Italy 2007
7.2.	ADP Dealer Systems - Italy	36	Euro-Italy 2007
7.2.1.	Overview and position in the market	36	Euro-Italy 2007
7.2.2.	Product-line	36	Euro-Italy 2007
7.2.3.	OEM "Endorsements"	37	Euro-Italy 2007
7.2.4.	Comment on ADP	38	Euro-Italy 2007
7.3.	Autentys	39	Euro-Italy 2007
7.3.1.	Overview and position in the market	39	Euro-Italy 2007
7.3.2.	Product-line	39	Euro-Italy 2007
7.3.3.	OEM "Endorsements"	39	Euro-Italy 2007
7.3.4.	Comment on Autentys	39	Euro-Italy 2007
7.4.	AXED-Lynx	40	Euro-Italy 2007
7.4.1.	Overview and position in the market	40	Euro-Italy 2007
7.4.2.	Product-line	40	Euro-Italy 2007
7.4.3.	OEM "Endorsements"	40	Euro-Italy 2007
7.4.4.	Comment on AXED-Lynx	40	Euro-Italy 2007
7.5.	BERI - a subsidiary of PSA	41	Euro-Italy 2007
7.5.1.	Overview and position in the market	41	Euro-Italy 2007
7.5.2.	Product-line	41	Euro-Italy 2007
7.5.3.	OEM "Endorsements"	41	Euro-Italy 2007
7.5.4.	Comment on BERI	41	Euro-Italy 2007
7.6	BIT (successor to COMED)	41	Euro-Italy 2007
7.7.	D.E.C. - Partner of Incadea/Carlo	42	Euro-Italy 2007
7.7.1.	Overview and position in the market	42	Euro-Italy 2007
7.7.2.	Product-line	43	Euro-Italy 2007
7.7.3.	OEM "Endorsements"	43	Euro-Italy 2007
7.7.4.	Comment on D.E.C.	43	Euro-Italy 2007
7.8	DMS S.r.l.	44	Euro-Italy 2007
7.8.1.	Overview and position in the market	44	Euro-Italy 2007
7.8.2.	Product-line	44	Euro-Italy 2007
7.8.3.	OEM "Endorsements"	44	Euro-Italy 2007
7.8.4.	Comment on DMS S.r.l.	44	Euro-Italy 2007
7.9.	Esseitalia	45	Euro-Italy 2007
7.9.1.	Overview and position in the market	45	Euro-Italy 2007
7.9.2.	Product-line	45	Euro-Italy 2007
7.9.3.	OEM "Endorsements"	46	Euro-Italy 2007
7.9.4.	Comment on Esseitalia	46	Euro-Italy 2007
7.10.	Global - Partner of Datafirst	47	Euro-Italy 2007
7.10.1.	Overview and position in the market	47	Euro-Italy 2007
7.10.2.	Product-line	47	Euro-Italy 2007
7.10.3.	OEM "Endorsements"	47	Euro-Italy 2007
7.10.4.	Comment on Global	48	Euro-Italy 2007
7.11.	Pantaservice - Partner of Automaster	49	Euro-Italy 2007
7.12.	SAP - with Partners AEC and ATOS	49	Euro-Italy 2007
7.13.	S.E.A.P.	50	Euro-Italy 2007
7.14.	T-Systems (gedas) - Partner of VW	50	Euro-Italy 2007
7.15.	Visual Software	51	Euro-Italy 2007
7.15.1.	Overview and position in the market	51	Euro-Italy 2007
7.15.2.	Product-line	51	Euro-Italy 2007
7.15.3.	OEM "Endorsements"	51	Euro-Italy 2007
7.15.4.	Comment on Visual Software	51	Euro-Italy 2007
7.16.	Infocar	52	Euro-Italy 2007
7.17.	EurotaxGlass's	52	Euro-Italy 2007
8	Fiat's Mirafiori Motor Village	53	Euro-Italy 2007
8.1.	An overview of the business	53	Euro-Italy 2007
8.1.1.	Sales process - in outline	53	Euro-Italy 2007
	Figure 8.1. Views of Fiat's Motor Village	54	Euro-Italy 2007
8.1.1.1.	At busy times...	55	Euro-Italy 2007
8.1.2.	Service process - in outline	55	Euro-Italy 2007
8.2.	Motor Village systems	55	Euro-Italy 2007
8.2.1.	Accounting and administration	55	Euro-Italy 2007
8.2.2.	Service & Parts	55	Euro-Italy 2007
8.2.3.	Point-of-sale systems	55	Euro-Italy 2007
8.3.	Comment on the Motor Village	56	Euro-Italy 2007
9	Autocity (Gruppo Barchetti) - Part 2	57	Euro-Italy 2007
	Figure 9.1. Layout of Autocity	57	Euro-Italy 2007
9.1.	Four main topics	57	Euro-Italy 2007
9.2.	The local Market	57	Euro-Italy 2007
9.2.1.	Barchetti operations in the region	58	Euro-Italy 2007
9.3.	Management approach to "multi-Brand"	58	Euro-Italy 2007

Section	Section Heading	Page	Document short title
9.4.	Operational layout for "multi-Brand"	58	Euro-Italy 2007
9.4.1.	"Single-Brand" areas	59	Euro-Italy 2007
9.4.2.	"Dual-purpose" areas	59	Euro-Italy 2007
9.4.3.	"Multi-Brand" areas	59	Euro-Italy 2007
9.5.	Systems approach to "multi-Brand"	60	Euro-Italy 2007
9.5.1.	Possible external sales of Automaster	60	Euro-Italy 2007
	Figure 9.2.a. Autocity - Sales Performance - Market share - by Brand in 2005/6/7	61	Euro-Italy 2007
	Figure 9.2.b. Autocity - Service Invoices by Brand - 2006 v 2007 to-date	62	Euro-Italy 2007
9.6.	Comment on Autocity - Barchetti Group	62	Euro-Italy 2007
9.6.1.	Does it work for the OEMs?	62	Euro-Italy 2007
9.6.2.	Does it work for Barchetti?	62	Euro-Italy 2007
10	Car World Italia Group - Milan - A brief Update	63	Euro-Italy 2007
10.1.	The previous situation	63	Euro-Italy 2007
10.2.	Two main changes	63	Euro-Italy 2007
10.3.	Reasons for the change of DMS	63	Euro-Italy 2007
10.4.	Progress to-date	63	Euro-Italy 2007
10.5.	An interesting situation in the Showroom	64	Euro-Italy 2007
10.6.	Preliminary comments on Car World	64	Euro-Italy 2007
10.6.1.	The situation in mid-May	64	Euro-Italy 2007
10.6.2.	Two other notes	64	Euro-Italy 2007
	Appendix - Briefing No. 14 - 2007 - 4th June - Automotive Dealer Day	65	Euro-Italy 2007
	OEM Integration with Dealers - Preface	1	Euro Integration 2007
1	Part of a wider, evolving Automotive Retailing environment	2	Euro Integration 2007
1.1.	The next BER Review	2	Euro Integration 2007
1.1.1.	Effects of the 2002 BER	2	Euro Integration 2007
1.1.1.1.	Changes in the Law	2	Euro Integration 2007
1.1.1.2.	A more "open" DMS market	2	Euro Integration 2007
	Figure 1.1. "General" Retail v Automotive Retail	3	Euro Integration 2007
	Figure 1.2. Key differences between "General" and Automotive	3	Euro Integration 2007
1.1.1.3.	Not always "fully open"	4	Euro Integration 2007
1.2.	Different viewpoints	4	Euro Integration 2007
1.2.1.	Who has the stronger influence?	4	Euro Integration 2007
1.3.	Will Dealers become "Customers"?	4	Euro Integration 2007
1.4.	The situation could be improved	4	Euro Integration 2007
1.5.	Conclusion	5	Euro Integration 2007
2	A facilitator in Automotive Retailing	6	Euro Integration 2007
2.1.	The "Ideal Dealer Network" for an OEM	6	Euro Integration 2007
2.1.1.	The reality is different	6	Euro Integration 2007
2.2.	The drivers of integration	6	Euro Integration 2007
2.3.	IT implications	7	Euro Integration 2007
2.4.	Implications for DSPs	7	Euro Integration 2007
2.5.	Implications for Dealers	7	Euro Integration 2007
2.5.1.	Not the same in all Countries	7	Euro Integration 2007
2.6.	OEMs still in the strongest position	7	Euro Integration 2007
	Main Integration Points between OEM and Dealer Systems	8	Euro Integration 2007
	Figure 2.1. Aftersales - Parts and Service	8	Euro Integration 2007
	Figure 2.2. Vehicle Sales	9	Euro Integration 2007
2.6.1.	OEM control - via Standards	10	Euro Integration 2007
2.6.2.	OEM control - via Money	10	Euro Integration 2007
2.7.	Dealer influence	10	Euro Integration 2007
2.7.1.	Will the Retailers become stronger?	11	Euro Integration 2007
2.8.	Smaller DSP performance	11	Euro Integration 2007
2.8.1.	Implications for the OEMs	11	Euro Integration 2007
2.9.	One opinion from the market	11	Euro Integration 2007
3	Seven factors which make "integration" complex	12	Euro Integration 2007
3.1.	IT issues	12	Euro Integration 2007
3.1.1.	OEM modernisation of "DCS"	12	Euro Integration 2007
3.2.	Development costs...	12	Euro Integration 2007
	Figure 3.1 7 Factors complicating "integration"	13	Euro Integration 2007
3.3.	Strategic Objectives...	14	Euro Integration 2007
3.4.	Business Relationships...	14	Euro Integration 2007
3.5.	Compliance...	14	Euro Integration 2007
3.5.1.	DSPs potentially at risk	15	Euro Integration 2007
3.6.	Maintenance of Open Competition	15	Euro Integration 2007
3.7.	Continuing investment	15	Euro Integration 2007
3.8.	Fundamental questions for OEMs...	15	Euro Integration 2007
3.9.	DMS for multi-Brand operations	15	Euro Integration 2007
3.9.1.	Organisational structure	15	Euro Integration 2007
4	OEM Applications which require integration	16	Euro Integration 2007
4.1.	OEMs with "advanced applications"	16	Euro Integration 2007
4.1.1.	Complex applications	16	Euro Integration 2007
4.1.2.	Impact on the DMS	16	Euro Integration 2007

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
	Figure 4.1. Overview of a DMS integrated with one "advanced" OEM	17	Euro Integration 2007
4.2.1.	Parts Department	18	Euro Integration 2007
4.2.1.1.	Trends	18	Euro Integration 2007
4.2.1.2.	More about Parts Locators	18	Euro Integration 2007
	Figure 4.2. Overview of DMS "Service" integrated with four "advanced" OEMs	19	Euro Integration 2007
4.2.1.3.	Comment on Parts integration	20	Euro Integration 2007
4.2.2.	Service Department	20	Euro Integration 2007
4.2.2.1.	Trends	20	Euro Integration 2007
4.2.2.2.	Comment on Service integration	21	Euro Integration 2007
4.2.3.	New Vehicle Sales Department	21	Euro Integration 2007
4.2.3.1.	Trends - at the "front end"	21	Euro Integration 2007
	Figure 4.3. Overview of DMS "Sales Front-end" integration	22	Euro Integration 2007
4.2.3.2.	Comment on Sales integration	23	Euro Integration 2007
4.2.4.	"CRM"	23	Euro Integration 2007
4.2.5.	Positions of individual OEMs	24	Euro Integration 2007
4.2.5.1.	"Basic applications"	24	Euro Integration 2007
4.3.	BMW	25	Euro Integration 2007
4.3.1.	BMW Dealer systems environment	25	Euro Integration 2007
4.3.1.1.	DCS/Portal	25	Euro Integration 2007
4.3.1.2.	DMS recommendations	25	Euro Integration 2007
4.3.2.	Advanced application areas	26	Euro Integration 2007
4.3.2.1.	Sales Assistant 3	26	Euro Integration 2007
4.3.2.2.	Parts - SRD	26	Euro Integration 2007
4.3.2.3.	Service	26	Euro Integration 2007
4.3.3.	Comment on BMW	27	Euro Integration 2007
4.3.4.	BMW and Dealer System Standards (STAR)	27	Euro Integration 2007
4.4.	Fiat Group Automobiles	28	Euro Integration 2007
4.4.1.	Fiat Dealer systems environment	28	Euro Integration 2007
4.4.1.1.	DCS/Portal	28	Euro Integration 2007
4.4.1.2.	DMS recommendations	28	Euro Integration 2007
4.4.2.	Advanced application areas	28	Euro Integration 2007
4.4.2.1.	eSales - a Sales Workstation	28	Euro Integration 2007
4.4.2.2.	eService - Repair Order system	29	Euro Integration 2007
4.4.3.	Comment on Fiat	30	Euro Integration 2007
4.4.4.	Fiat and Dealer System Standards (STAR)	30	Euro Integration 2007
4.5.	Ford of Europe	31	Euro Integration 2007
4.5.1.	Dealer systems environment	31	Euro Integration 2007
4.5.1.1.	DCS/Portal	31	Euro Integration 2007
4.5.1.2.	DMS recommendations	31	Euro Integration 2007
4.5.2.	Advanced application areas	31	Euro Integration 2007
4.5.2.1.	Parts	31	Euro Integration 2007
4.5.2.2.	Sales	32	Euro Integration 2007
4.5.2.3.	Diagnostic systems...	32	Euro Integration 2007
4.5.3.	Comment on Ford	32	Euro Integration 2007
4.5.4.	Ford and Dealer System Standards (STAR)	33	Euro Integration 2007
4.6.	General Motors Europe	34	Euro Integration 2007
4.6.1.	Dealer systems environment	34	Euro Integration 2007
4.6.1.1.	DCS/Portal	34	Euro Integration 2007
4.6.1.2.	DMS recommendations	34	Euro Integration 2007
4.6.2.	Advanced application areas	34	Euro Integration 2007
4.6.2.1.	Parts	35	Euro Integration 2007
4.6.2.2.	Service	35	Euro Integration 2007
4.6.2.3.	Sales	35	Euro Integration 2007
4.6.3.	Comment	35	Euro Integration 2007
4.6.4.	GM and Dealer System Standards (STAR)	35	Euro Integration 2007
4.7.	Mercedes-Benz and Smart	36	Euro Integration 2007
4.7.1.	Dealer systems environment	36	Euro Integration 2007
4.7.1.1.	DCS/Portal	36	Euro Integration 2007
4.7.1.2.	DMS recommendations	36	Euro Integration 2007
4.7.2.	Advanced application areas	36	Euro Integration 2007
4.7.3.	Comment on M-B and Smart	36	Euro Integration 2007
	Figure 4.7.1. Original Smart Centre System - Highly integrated in 1998	37	Euro Integration 2007
4.8.	PSA - Citroën and Peugeot	38	Euro Integration 2007
4.8.1.	Dealer systems environment	38	Euro Integration 2007
4.8.1.1.	DCS/Portal	38	Euro Integration 2007
4.8.1.2.	DMS recommendations	38	Euro Integration 2007
4.8.2.	Advanced application areas	38	Euro Integration 2007
4.8.2.1.	Parts	38	Euro Integration 2007
4.8.2.2.	Sales	39	Euro Integration 2007
4.8.2.3.	"CRM"	39	Euro Integration 2007
4.8.3.	Comment on PSA	39	Euro Integration 2007
4.8.4.	PSA and Dealer System Standards (STAR)	39	Euro Integration 2007

Section	Section Heading	Page	Document short title
4.9.	Renault	40	Euro Integration 2007
4.9.1.	Dealer systems environment	40	Euro Integration 2007
4.9.1.1.	A Member of STAR	40	Euro Integration 2007
4.9.1.2.	DCS/Portal	40	Euro Integration 2007
4.9.1.3.	DMS recommendations	40	Euro Integration 2007
4.9.2.	Advanced application areas	40	Euro Integration 2007
4.9.2.1.	Parts	41	Euro Integration 2007
4.9.2.2.	Service	41	Euro Integration 2007
4.9.2.3.	Sales	41	Euro Integration 2007
4.9.3.	Comment on Renault	41	Euro Integration 2007
4.9.4.	Renault and Dealer System Standards (STAR)	41	Euro Integration 2007
4.9.5.	Comment on Renault-Nissan	41	Euro Integration 2007
4.10.	Volkswagen Group	42	Euro Integration 2007
4.10.1.	Dealer systems environment	42	Euro Integration 2007
4.10.1.1.	DCS/Portal	42	Euro Integration 2007
4.10.1.2.	DMS recommendations	42	Euro Integration 2007
4.10.2.	Advanced application areas	42	Euro Integration 2007
4.10.2.1.	Parts	42	Euro Integration 2007
4.10.2.2.	Service	42	Euro Integration 2007
4.10.2.3.	Sales	43	Euro Integration 2007
4.10.2.4.	"CRM"	43	Euro Integration 2007
4.10.3.	Comment on VW-Audi	43	Euro Integration 2007
4.10.4.	VW Group Dealer System Standards (STAR)	43	Euro Integration 2007
4.11.	Brief comments on other OEMs	44	Euro Integration 2007
4.11.1.	Chrysler	44	Euro Integration 2007
4.11.2.	Honda	44	Euro Integration 2007
4.11.3.	Hyundai	44	Euro Integration 2007
4.11.4.	Jaguar and Land Rover	44	Euro Integration 2007
4.11.5.	Mazda	44	Euro Integration 2007
4.11.6.	Mitsubishi	44	Euro Integration 2007
4.11.7.	Nissan	44	Euro Integration 2007
4.11.8.	Toyota-Lexus	44	Euro Integration 2007
4.11.9.	Volvo Car	44	Euro Integration 2007
5	Status of Standards for Dealer Systems in Europe	45	Euro Integration 2007
5.1.	Activity to-date	45	Euro Integration 2007
5.1.1.	Background	45	Euro Integration 2007
5.1.2.	The "multiple Europes"	45	Euro Integration 2007
5.2.	A possible co-ordinator	45	Euro Integration 2007
	Figure 5.1. The DMS as a Data and Communications Hub	46	Euro Integration 2007
5.3.	Renault joins STAR	47	Euro Integration 2007
5.4.	Two DSPs become involved	47	Euro Integration 2007
5.5.	Individual OEM activities	47	Euro Integration 2007
5.6.	Developments by STAR - USA	47	Euro Integration 2007
5.7.	A new initiative	47	Euro Integration 2007
5.8.	STAR-related activities in Italy	47	Euro Integration 2007
5.9.	Comment	47	Euro Integration 2007
5.9.1.	A related area of integration	48	Euro Integration 2007
6	Conclusions - Strategies for OEMs	49	Euro Integration 2007
6.1.	OEM Option 1	49	Euro Integration 2007
6.2.	OEM Option 2	49	Euro Integration 2007
6.3.	OEM Option 3	49	Euro Integration 2007
6.4.	OEM Option 4	50	Euro Integration 2007
6.5.	OEM Option 5	50	Euro Integration 2007
6.6.	Which is the logical choice?	50	Euro Integration 2007
6.7.	Closing comment - for now	51	Euro Integration 2007
6.7.1.	The changing markets...A problem for some OEMs	51	Euro Integration 2007
6.7.2.	Two legal "uncertainties"	51	Euro Integration 2007
1	Overview	1	USA 2007 - Arkona & DT
1.1.	The possibility of change	1	USA 2007 - Arkona & DT
1.2.	Key developments in the DMS market	1	USA 2007 - Arkona & DT
1.2.1.	Order of importance	1	USA 2007 - Arkona & DT
1.3.	The new market situation	1	USA 2007 - Arkona & DT
1.4.	Analyses of Tier 2 DSPs	2	USA 2007 - Arkona & DT
1.4.1.	List of Tier 2 DSPs	3	USA 2007 - Arkona & DT
1.5.	Only the beginning	3	USA 2007 - Arkona & DT
2	The DSP - Arkona - a DealerTrack Company since June 2007	4	USA 2007 - Arkona & DT
2.1.	Brief history of Arkona	4	USA 2007 - Arkona & DT
2.2.	Arkona within DealerTrack	4	USA 2007 - Arkona & DT
2.3.	Status of Arkona when it was acquired	4	USA 2007 - Arkona & DT
2.3.1.	Last financial report	5	USA 2007 - Arkona & DT
	Table 2.3.1. Arkona Q3 - 2007 Results	5	USA 2007 - Arkona & DT
2.3.2.	Arkona in the UK	5	USA 2007 - Arkona & DT

Section	Section Heading	Page	Document short title
2.3.3.	What DealerTrack paid	5	USA 2007 - Arkona & DT
2.4.	Why DealerTrack acquired Arkona	6	USA 2007 - Arkona & DT
2.4.1.	A changed role in the market	6	USA 2007 - Arkona & DT
2.4.2.	Can the acquisition be profitable?	6	USA 2007 - Arkona & DT
2.4.2.1.	Rapid Growth	6	USA 2007 - Arkona & DT
2.4.2.2.	New customers are available	6	USA 2007 - Arkona & DT
2.4.2.3.	Increased product capability	7	USA 2007 - Arkona & DT
2.4.2.4.	Some constraints	7	USA 2007 - Arkona & DT
2.4.2.5.	Potential impact of DealerTrack	7	USA 2007 - Arkona & DT
2.3.7.	Potential rate of growth	8	USA 2007 - Arkona & DT
2.3.8.	Response of Tier 1 DSPs	8	USA 2007 - Arkona & DT
2.3.8.1.	Terms of Business	9	USA 2007 - Arkona & DT
2.3.9.	Impact on Arkona's customers	9	USA 2007 - Arkona & DT
2.3.10.	Open interfaces	10	USA 2007 - Arkona & DT
2.4.	The Arkona DMS	10	USA 2007 - Arkona & DT
2.4.1.	Hardware platform	10	USA 2007 - Arkona & DT
2.4.2.	DMS Applications	10	USA 2007 - Arkona & DT
	Figure 2.1. Arkona's Table outlining what it offers compared with Tier 1 DSPs	11	USA 2007 - Arkona & DT
2.4.3.	DMS User Interface	12	USA 2007 - Arkona & DT
2.4.4.	DMS Delivery	12	USA 2007 - Arkona & DT
2.4.5.	OEM Integration	12	USA 2007 - Arkona & DT
2.4.6.	Plans for future development	13	USA 2007 - Arkona & DT
2.4.6.1.	Combining the products - strategy	13	USA 2007 - Arkona & DT
	Figure 2.2. Overview - DealerTrack's Acquisitions and Partners in Product Line	13	USA 2007 - Arkona & DT
2.4.6.2.	The competitive situation	14	USA 2007 - Arkona & DT
2.4.6.3.	Combining the products - details	14	USA 2007 - Arkona & DT
	Figure 2.3. DealerTrack's complex of systems, services and Partner links - USA	15	USA 2007 - Arkona & DT
2.4.6.4.	Selling the combined products	16	USA 2007 - Arkona & DT
2.5.	Comment on Arkona with DealerTrack	16	USA 2007 - Arkona & DT
2.5.1.	Initial conclusion	16	USA 2007 - Arkona & DT
3	Chapman Automotive Group - Phoenix - One of Arkona's largest customers	17	USA 2007 - Arkona & DT
3.1.	Reasons for reviewing CAG	17	USA 2007 - Arkona & DT
3.2.	Overview of the Group	17	USA 2007 - Arkona & DT
3.2.1.	Organisational strategy	17	USA 2007 - Arkona & DT
3.3.	Arkona in the CAG businesses	18	USA 2007 - Arkona & DT
3.3.1.	The first stage	18	USA 2007 - Arkona & DT
	Figure 3.1. Chapman Automotive Group - Organisation, Locations and Brands	19	USA 2007 - Arkona & DT
3.3.2.	Implementation of Arkona in Phoenix	20	USA 2007 - Arkona & DT
3.3.3.	Arkona in Tuscon	20	USA 2007 - Arkona & DT
3.3.4.	Arkona for Phoenix	20	USA 2007 - Arkona & DT
3.3.5.	Group Accounting and Reporting	20	USA 2007 - Arkona & DT
3.3.6.	Arkona and OEM interfaces	21	USA 2007 - Arkona & DT
3.3.7.	Arkona and other external interfaces	21	USA 2007 - Arkona & DT
3.3.7.1.	Finance & Insurance Networks (FANs)	21	USA 2007 - Arkona & DT
3.3.7.2.	Other Interfaces	21	USA 2007 - Arkona & DT
3.3.8.	Character and Graphical User Interfaces	21	USA 2007 - Arkona & DT
3.4.	Lead Management & "CRM" in CAG	22	USA 2007 - Arkona & DT
3.4.1.	Arkona in a BDC	22	USA 2007 - Arkona & DT
3.4.2.	Lead Management within CAG	22	USA 2007 - Arkona & DT
3.4.3.	An "in-house" development	22	USA 2007 - Arkona & DT
	Figure 3.2. Chapman Automotive Group - Systems Structure	23	USA 2007 - Arkona & DT
3.5.	The IT Department	24	USA 2007 - Arkona & DT
3.6.	CAG's relationship with Arkona	24	USA 2007 - Arkona & DT
3.7.	The effect of Arkona within CAG	24	USA 2007 - Arkona & DT
3.7.1.	Gains in most areas	24	USA 2007 - Arkona & DT
3.7.2.	A flexible customer	24	USA 2007 - Arkona & DT
3.8.	Closing comment	24	USA 2007 - Arkona & DT
	Appendix 1 ARKONA Posts Third Quarter Fiscal 2007 Results	25	USA 2007 - Arkona & DT
	Appendix 2 Briefing - No. 12 - 2007 - 1 May - MCL - a new (old) DSP in the UK	27	USA 2007 - Arkona & DT
1	Preface and a little bit of history	1	Internat. 2007 Incadea
1.1.	Background	1	Internat. 2007 Incadea
1.2.	The reason for this Analysis	1	Internat. 2007 Incadea
1.3.	The end of a dramatic 7 years	1	Internat. 2007 Incadea
1.4.	Microsoft's role in the sale of Incadea	2	Internat. 2007 Incadea
1.5.	Incadea's future - Comment	3	Internat. 2007 Incadea
1.6.	First Quarter - owners' summary	3	Internat. 2007 Incadea
2	Initial review	4	Internat. 2007 Incadea
2.1.	An evolving situation	4	Internat. 2007 Incadea
2.2.	Six aspects	4	Internat. 2007 Incadea
2.3.	Incadea's new basis of operation	5	Internat. 2007 Incadea
2.3.1.	Hand-over from R&R	5	Internat. 2007 Incadea
2.3.1.1.	People - "RCS"	5	Internat. 2007 Incadea

Section	Section Heading	Page	Document short title
2.3.1.2.	People - Geneva Head Office	5	Internat. 2007 Incadea
2.3.1.3.	Subsidiaries	5	Internat. 2007 Incadea
2.3.1.4.	Financial hand-over - Comment	5	Internat. 2007 Incadea
2.3.1.5.	Is the deal "completed"?	6	Internat. 2007 Incadea
2.3.2.	Relationships with MS and R&R	6	Internat. 2007 Incadea
2.3.2.1.	Microsoft	6	Internat. 2007 Incadea
2.3.2.2.	Reynolds & Reynolds	6	Internat. 2007 Incadea
2.3.2.3.	The 4 "no entry" markets	7	Internat. 2007 Incadea
2.3.3.	The new organisation	7	Internat. 2007 Incadea
2.3.4.	Potential for profitability - Comment	8	Internat. 2007 Incadea
2.4.	The new Partner network	8	Internat. 2007 Incadea
2.4.1.	A different attitude?	8	Internat. 2007 Incadea
2.4.2.	A very wide range of Partners	8	Internat. 2007 Incadea
2.4.3.	Partner Relationships & Standards	8	Internat. 2007 Incadea
2.4.4.	Relationships with Microsoft	9	Internat. 2007 Incadea
2.4.4.1.	A difficult situation	9	Internat. 2007 Incadea
2.4.4.2.	Microsoft's strategy for Dealers	9	Internat. 2007 Incadea
	Figure 2.1. Incadea's Country coverage and Partners - February 2007	10	Internat. 2007 Incadea
	Figure 2.2. Incadea's Country coverage and Partners - September 2007	11	Internat. 2007 Incadea
	Figure 2.3. Microsoft's position	12	Internat. 2007 Incadea
2.5.	Incadea's existing Customer Base	13	Internat. 2007 Incadea
2.5.1.	Total to-date	13	Internat. 2007 Incadea
2.5.2.	Direct Customers	13	Internat. 2007 Incadea
2.5.3.	Indirect Customers	13	Internat. 2007 Incadea
2.5.4.	OEM approvals/recommendations	14	Internat. 2007 Incadea
2.5.5.	An International Group customer	14	Internat. 2007 Incadea
2.6.	Status of the existing IncadeaDMS	15	Internat. 2007 Incadea
2.6.1.	The "layers"	15	Internat. 2007 Incadea
2.6.2.	IncadeaDMS versions in operation	15	Internat. 2007 Incadea
2.6.3.	Navision ERP versions in operation	15	Internat. 2007 Incadea
2.6.4.	Multi-Brand operations	15	Internat. 2007 Incadea
2.6.5.	A Compact version	16	Internat. 2007 Incadea
2.7.	Product development in future	16	Internat. 2007 Incadea
2.7.1.	The situation at "hand-over"	16	Internat. 2007 Incadea
2.7.2.	The situation after "hand-over"	16	Internat. 2007 Incadea
2.7.3.	Expected developments	16	Internat. 2007 Incadea
2.8.	The current "largest" Customer	16	Internat. 2007 Incadea
2.9.	Comment on the "new" Incadea	17	Internat. 2007 Incadea
3	Incadea's Distribution Channels	18	Internat. 2007 Incadea
3.1.	Evolving with time	18	Internat. 2007 Incadea
3.2.	Roles of the Subsidiaries	18	Internat. 2007 Incadea
3.2.1.	Germany	18	Internat. 2007 Incadea
3.2.2.	France	18	Internat. 2007 Incadea
3.2.3.	Spain	19	Internat. 2007 Incadea
3.3.	The Partners	19	Internat. 2007 Incadea
3.3.1.	Changed situations of Partners	19	Internat. 2007 Incadea
3.3.2.	Some markets no longer "open"	19	Internat. 2007 Incadea
3.3.3.	Individual Partner reviews	20	Internat. 2007 Incadea
3.3.3.1.	Comment - the value of Partners	20	Internat. 2007 Incadea
3.4.	EDS-MmS - Incadea's largest Partner	21	Internat. 2007 Incadea
3.4.1.	A two-tier structure	21	Internat. 2007 Incadea
3.4.2.	Organisational structure	21	Internat. 2007 Incadea
3.4.3.	DMS distribution	21	Internat. 2007 Incadea
	Figure 3.4.1. EDS-MmS Partners	21	Internat. 2007 Incadea
3.4.3.1.	Total Sales of CARLO	22	Internat. 2007 Incadea
3.4.3.2.	Germany	22	Internat. 2007 Incadea
3.4.3.3.	Italy	22	Internat. 2007 Incadea
3.4.3.4.	BeNeLux	22	Internat. 2007 Incadea
3.4.3.5.	Austria	22	Internat. 2007 Incadea
3.4.3.6.	Greece	22	Internat. 2007 Incadea
3.4.3.7.	Switzerland	23	Internat. 2007 Incadea
3.4.3.8.	Portugal	23	Internat. 2007 Incadea
3.4.3.9.	Norway	23	Internat. 2007 Incadea
3.4.3.10.	Russia	23	Internat. 2007 Incadea
3.4.3.11.	A note on other markets	23	Internat. 2007 Incadea
3.4.4.	Outline history of EDS-MmS	23	Internat. 2007 Incadea
3.4.4.1.	CICOS, PETACS, GODICS	23	Internat. 2007 Incadea
3.4.5.	Brands covered by CARLO	24	Internat. 2007 Incadea
3.4.5.1.	Comment on VW-Audi	24	Internat. 2007 Incadea
3.4.6.	Groups covered by CARLO	24	Internat. 2007 Incadea
3.4.6.1.	A special case	25	Internat. 2007 Incadea
3.4.7.	The CARLO product	25	Internat. 2007 Incadea

Section	Section Heading	Page	Document short title
3.4.7.1.	History in outline	25	Internat. 2007 Incadea
3.4.7.2.	Product differences	25	Internat. 2007 Incadea
3.4.7.3.	Co-operation with Incadea	25	Internat. 2007 Incadea
3.4.7.4.	ASP operation	26	Internat. 2007 Incadea
3.4.8.	Comment on EDS-MmS	26	Internat. 2007 Incadea
3.5.	D.E.C. Italy	27	Internat. 2007 Incadea
3.5.1.	A Partner of Incadea and EDS-MmS	27	Internat. 2007 Incadea
3.5.2.	A long-term commitment	27	Internat. 2007 Incadea
3.5.3.	Customer bases	27	Internat. 2007 Incadea
3.5.4.	Software development	27	Internat. 2007 Incadea
3.5.5.	OEM approvals/recommendations	27	Internat. 2007 Incadea
3.5.6.	Comment on D.E.C.	28	Internat. 2007 Incadea
3.6.	Helios - Belgium • Netherlands • Luxemburg	29	Internat. 2007 Incadea
3.6.1.	A Partner of Incadea and EDS-MmS	29	Internat. 2007 Incadea
3.6.2.	Automotive products	29	Internat. 2007 Incadea
3.6.3.	IncadeaDMS and CARLO customers	29	Internat. 2007 Incadea
3.6.4.	Comment on Helios	29	Internat. 2007 Incadea
3.7.	Micrauto - France and Africa	30	Internat. 2007 Incadea
3.7.1.	A Partner of Incadea	30	Internat. 2007 Incadea
3.7.2.	Structure of the business	30	Internat. 2007 Incadea
3.7.3.	Product range	30	Internat. 2007 Incadea
3.7.4.	Customers to-date	30	Internat. 2007 Incadea
3.7.5.	"Tier 2" Partners	31	Internat. 2007 Incadea
3.7.6.	Comment on Micrauto	31	Internat. 2007 Incadea
3.8.	S4 Computer - Austria	32	Internat. 2007 Incadea
3.8.1.	A Partner of Incadea and EDS-MmS	32	Internat. 2007 Incadea
3.8.2.	A Partner business	32	Internat. 2007 Incadea
3.8.3.	Progress in the market	32	Internat. 2007 Incadea
3.8.4.	Comment on S4 Computer	32	Internat. 2007 Incadea
3.9.	Semler IT - Denmark	33	Internat. 2007 Incadea
3.9.1.	A Partner of Incadea	33	Internat. 2007 Incadea
3.9.2.	Position in the market	33	Internat. 2007 Incadea
3.9.3.	Product history and plans	33	Internat. 2007 Incadea
3.9.4.	A significant new customer	33	Internat. 2007 Incadea
3.9.5.	Comment on Semler IT	33	Internat. 2007 Incadea
3.10.	T-Systems - Germany	34	Internat. 2007 Incadea
3.10.1.	A Partner of Incadea	34	Internat. 2007 Incadea
3.10.2.	Major re-organisation	34	Internat. 2007 Incadea
3.10.3.	T-Systems and BMW	34	Internat. 2007 Incadea
3.10.4.	T-Systems and VW	34	Internat. 2007 Incadea
3.10.5.	Comment on T-Systems	34	Internat. 2007 Incadea
3.11.	Brief notes on other situations	35	Internat. 2007 Incadea
3.11.1.	Greece	35	Internat. 2007 Incadea
3.11.2.	Russia	35	Internat. 2007 Incadea
3.11.3.	Comment	35	Internat. 2007 Incadea
4	Auto-Staiger - Stuttgart - A major Group selling GM's family of vehicles	36	Internat. 2007 Incadea
4.1.	One of "Incadea's" largest customers	36	Internat. 2007 Incadea
4.2.	The Group in outline	36	Internat. 2007 Incadea
4.3.	Systems	36	Internat. 2007 Incadea
4.3.1.	More than one DMS	37	Internat. 2007 Incadea
4.3.2.	CARLO implementation	37	Internat. 2007 Incadea
	Figure 4.1. Auto-Staiger - Systems Structure - CARLO at the Centre	38	Internat. 2007 Incadea
4.3.3.	CARLO in operation	39	Internat. 2007 Incadea
4.3.4.	Parts Distribution Centre	39	Internat. 2007 Incadea
	Figure 4.2. Auto-Staiger's Parts Distribution Centre in Opel's Network	40	Internat. 2007 Incadea
4.4.	Staiger's IT Department	41	Internat. 2007 Incadea
4.5.	Comment on Auto-Staiger	41	Internat. 2007 Incadea
1	Preface	1	Internat. 2007 SAP Int.
1.1.	Background	1	Internat. 2007 SAP Int.
1.2.	The reason for this Analysis	1	Internat. 2007 SAP Int.
2	The first three years in the DMS business	2	Internat. 2007 SAP Int.
2.1.	Selective marketing	2	Internat. 2007 SAP Int.
2.1.1.	"Official" and "unofficial" products	2	Internat. 2007 SAP Int.
2.1.2.	Comment on SAP-based DMS	3	Internat. 2007 SAP Int.
2.2.	Initial markets for DBM	3	Internat. 2007 SAP Int.
2.3.	The Partners	3	Internat. 2007 SAP Int.
2.3.1.	Partners in two "categories"	4	Internat. 2007 SAP Int.
2.3.1.1.	Traditional DSP Partners	4	Internat. 2007 SAP Int.
2.3.1.2.	Systems House Partners	5	Internat. 2007 SAP Int.
2.3.1.3.	A new Partner - Motiveauto Ltd.	7	Internat. 2007 SAP Int.
2.4.	SAP - Direct sales	7	Internat. 2007 SAP Int.
2.5.	The product	7	Internat. 2007 SAP Int.

Section	Section Heading	Page	Document short title
2.5.1.	Overview	7	Internat. 2007 SAP Int.
2.5.2.	DMS structure	7	Internat. 2007 SAP Int.
2.5.3.	Origins of DBM	8	Internat. 2007 SAP Int.
2.5.4.	Versions of DBM	8	Internat. 2007 SAP Int.
2.5.5.	OEM and other "market" Interfaces	8	Internat. 2007 SAP Int.
2.5.5.1.	Partner developments	8	Internat. 2007 SAP Int.
2.5.5.2.	Comment on a critical factor	9	Internat. 2007 SAP Int.
2.6.	Initial customers	9	Internat. 2007 SAP Int.
2.6.1.	Categories of customers	9	Internat. 2007 SAP Int.
2.6.2.	Inchcape Group	10	Internat. 2007 SAP Int.
2.6.2.1.	Comment on International Groups	10	Internat. 2007 SAP Int.
2.6.3.	Rush Enterprises Inc. - USA	11	Internat. 2007 SAP Int.
2.6.3.1.	Comment on Rush	12	Internat. 2007 SAP Int.
	Figure 2.1. Countries with DBM or other SAP ERP-based DMS customers	12	Internat. 2007 SAP Int.
2.6.4.	Toyota Tsusho Africa	12	Internat. 2007 SAP Int.
2.6.4.1.	Comment on Toyota Tsusho Africa	13	Internat. 2007 SAP Int.
2.6.5.	Central and South America	13	Internat. 2007 SAP Int.
2.7.	Other SAP automotive systems	13	Internat. 2007 SAP Int.
2.7.1.	The earliest SAP DMS in Europe?	13	Internat. 2007 SAP Int.
3	Proton - Malaysia	15	Internat. 2007 SAP Int.
3.1.	Distributor & Dealer systems on a single platform, implemented simultaneously	15	Internat. 2007 SAP Int.
3.2.	A widely distributed Country with an expanding OEM	15	Internat. 2007 SAP Int.
3.3.	The new systems project	16	Internat. 2007 SAP Int.
3.3.1.	Previous systems	16	Internat. 2007 SAP Int.
3.3.2.	Proton's team and its objectives	16	Internat. 2007 SAP Int.
3.3.3.	Selection of a system provider	16	Internat. 2007 SAP Int.
3.4.	Project implementation	16	Internat. 2007 SAP Int.
3.4.1.	Deciding the approach	16	Internat. 2007 SAP Int.
3.4.2.	Implementation Partners	17	Internat. 2007 SAP Int.
3.4.3.	Implementation schedule	17	Internat. 2007 SAP Int.
3.4.4.	SAP applications	17	Internat. 2007 SAP Int.
3.4.4.1.	DBM version	17	Internat. 2007 SAP Int.
3.4.5.	Implementation "Headlines"	18	Internat. 2007 SAP Int.
3.4.6.	Factors in the success	18	Internat. 2007 SAP Int.
	Figure 3.1. Proton's diagram showing the e•CORE applications structure	18	Internat. 2007 SAP Int.
3.5.	System statistics	18	Internat. 2007 SAP Int.
3.6.	Dealer outlines	18	Internat. 2007 SAP Int.
3.7.	Gains from the new system	18	Internat. 2007 SAP Int.
	Figure 3.2. Proton's diagram showing the e•CORE Business Process Scope	20	Internat. 2007 SAP Int.
3.8.	Comment on the project	20	Internat. 2007 SAP Int.
1	Preface	1	Euro 2007 Reynolds
1.1.	Background	1	Euro 2007 Reynolds
1.2.	International structure	1	Euro 2007 Reynolds
1.3.	Purpose of this Analysis	1	Euro 2007 Reynolds
2	Overview of R&R on the Continent and in the UK	2	Euro 2007 Reynolds
2.1.	Two separate operations	2	Euro 2007 Reynolds
2.2.	Acquisition history	2	Euro 2007 Reynolds
2.2.1.	UCS and Kalamazoo	2	Euro 2007 Reynolds
2.2.2.	DCS Automotive	3	Euro 2007 Reynolds
2.3.	Two very different operations	3	Euro 2007 Reynolds
2.4.	No. 2 in overall size in Europe	3	Euro 2007 Reynolds
	Figure 1.1. History of DSP Consolidations & Partnerships	4	Euro 2007 Reynolds
3	Kalamazoo-Reynolds in the UK	6	Euro 2007 Reynolds
3.1.	Six years as part of UCS	6	Euro 2007 Reynolds
3.1.1.	Market expectations	6	Euro 2007 Reynolds
3.1.2.	Not the same in the UK	6	Euro 2007 Reynolds
3.1.3.	Well integrated, but nearly autonomous	6	Euro 2007 Reynolds
3.1.4.	UCS was already in the UK	7	Euro 2007 Reynolds
3.1.5.	Relationships with the Continent	7	Euro 2007 Reynolds
3.1.6.	Company names and locations	7	Euro 2007 Reynolds
3.1.7.	People	7	Euro 2007 Reynolds
3.1.7.1.	DCS Automotive's SAP team	7	Euro 2007 Reynolds
3.1.7.2.	Kalamazoo's staff retention	7	Euro 2007 Reynolds
3.1.7.3.	Recruitment	8	Euro 2007 Reynolds
3.1.7.4.	A transformed organisation	8	Euro 2007 Reynolds
3.2.	Products	8	Euro 2007 Reynolds
3.2.1.	Concentrating on DMS	8	Euro 2007 Reynolds
3.2.1.1.	Planned life-times	8	Euro 2007 Reynolds
3.2.1.2.	Total customer base	8	Euro 2007 Reynolds
	Figure 3.1. Kalamazoo-Reynolds • DMS Range - summary	9	Euro 2007 Reynolds
3.2.2.	DARTS	10	Euro 2007 Reynolds
3.2.3.	KDMS	10	Euro 2007 Reynolds

Section	Section Heading	Page	Document short title
3.2.3.1.	The VW situation	10	Euro 2007 Reynolds
3.2.3.2.	Future of KDMS	11	Euro 2007 Reynolds
3.2.4.	Elite	11	Euro 2007 Reynolds
3.2.4.1.	Future of Elite	11	Euro 2007 Reynolds
3.2.5.	GDMS	11	Euro 2007 Reynolds
3.2.5.1.	Future of GDMS	11	Euro 2007 Reynolds
3.2.6.	POWER	11	Euro 2007 Reynolds
	Figure 3.2.a. POWER DMS - Structure in outline	12	Euro 2007 Reynolds
3.2.6.1.	POWER applications	13	Euro 2007 Reynolds
3.2.6.2.	IBC - Internet Business Connection	13	Euro 2007 Reynolds
	Figure 3.2.b. POWER DMS and IBC - Applications covered	14	Euro 2007 Reynolds
	Figure 3.3. Two sample POWER screens	14	Euro 2007 Reynolds
3.2.6.3.	OEM Integration	15	Euro 2007 Reynolds
3.2.6.4.	F&I - POWERFIM	16	Euro 2007 Reynolds
3.2.6.5.	Conversion tools	16	Euro 2007 Reynolds
3.2.6.6.	ASP operation	16	Euro 2007 Reynolds
3.2.6.7.	System implementation	16	Euro 2007 Reynolds
3.2.6.8.	Support	16	Euro 2007 Reynolds
3.2.6.9.	Contracts	16	Euro 2007 Reynolds
3.2.7.	Introduction of new products	17	Euro 2007 Reynolds
3.2.7.1.	Callbright	17	Euro 2007 Reynolds
3.2.7.2.	KeyTrack	17	Euro 2007 Reynolds
3.3.	Conclusions and comments	17	Euro 2007 Reynolds
3.3.1.	The situation in 2000 "before UCS"	17	Euro 2007 Reynolds
3.3.2.	Dramatically different under UCS	18	Euro 2007 Reynolds
3.3.3.	Little impact from "R&R"	18	Euro 2007 Reynolds
3.3.4.	DMS only	18	Euro 2007 Reynolds
3.3.5.	The "Incadea" situation in the UK	18	Euro 2007 Reynolds
3.3.6.	Still a lot to be done	18	Euro 2007 Reynolds
4	Austria, France, Germany, Portugal, Spain, Switzerland, BeNeLux	19	Euro 2007 Reynolds
4.1.	Two sets of merged DSPs, merged again	19	Euro 2007 Reynolds
4.1.1.	Organisational structures	19	Euro 2007 Reynolds
	Figure 4.1. R&R • European Country Coverage and DMS Types	20	Euro 2007 Reynolds
4.1.2.	Reviewed by Country	21	Euro 2007 Reynolds
4.2.	Austria	21	Euro 2007 Reynolds
4.3.	Germany & Switzerland	21	Euro 2007 Reynolds
4.3.1.	Overview	21	Euro 2007 Reynolds
4.3.2.	Customer bases	21	Euro 2007 Reynolds
4.3.3.	Strategy for Germany	22	Euro 2007 Reynolds
4.3.3.1.	OEM recommendations	22	Euro 2007 Reynolds
4.3.3.2.	A more open market now	22	Euro 2007 Reynolds
4.3.3.3.	Customer "loyalty"	23	Euro 2007 Reynolds
4.3.3.4.	The impact of "multi-Brand"	23	Euro 2007 Reynolds
4.3.4.	DMS development in more detail	23	Euro 2007 Reynolds
4.3.4.1.	EuroPlus	23	Euro 2007 Reynolds
	Figure 4.2. Brands supported by Cardis-Reynolds	23	Euro 2007 Reynolds
4.3.4.2.	Formel 1 Evolution	24	Euro 2007 Reynolds
4.3.4.3.	Add-on "sub-systems"	24	Euro 2007 Reynolds
4.3.4.4.	ASP Hosting	25	Euro 2007 Reynolds
4.3.5.	OEM Integration	25	Euro 2007 Reynolds
4.3.6.	Conclusions and comments	25	Euro 2007 Reynolds
4.3.6.1.	Confirmation, not change	25	Euro 2007 Reynolds
4.3.6.2.	Retain and expand	25	Euro 2007 Reynolds
4.3.6.3.	No pan-European plans yet	25	Euro 2007 Reynolds
4.3.6.4.	One more confirmation needed?	25	Euro 2007 Reynolds
4.4.	BeNeLux	26	Euro 2007 Reynolds
4.4.1.	Three different Countries	26	Euro 2007 Reynolds
4.4.2.	Six years of ownership by UCS	26	Euro 2007 Reynolds
4.4.3.	Products and Customers	26	Euro 2007 Reynolds
4.4.3.1.	DARTS	26	Euro 2007 Reynolds
4.4.3.2.	Megacar	26	Euro 2007 Reynolds
4.4.4.	Conclusions and comments	27	Euro 2007 Reynolds
4.5.	France	28	Euro 2007 Reynolds
4.5.1.	Overview	28	Euro 2007 Reynolds
4.5.2.	Customer bases	28	Euro 2007 Reynolds
4.5.3.	Strategy for France	29	Euro 2007 Reynolds
4.5.3.1.	OEM recommendations	29	Euro 2007 Reynolds
4.5.3.2.	A changing market	29	Euro 2007 Reynolds
4.5.4.	DMS development in more detail	30	Euro 2007 Reynolds
4.5.4.1.	EuroPlus	30	Euro 2007 Reynolds
4.5.4.2.	DCSNet	30	Euro 2007 Reynolds
4.5.4.3.	GDMS	31	Euro 2007 Reynolds

Section	Section Heading	Page	Document short title
4.5.5.	Conclusions and comments	31	Euro 2007 Reynolds
4.5.5.1.	Confirmation, not change	31	Euro 2007 Reynolds
4.5.5.2.	Retain and expand	31	Euro 2007 Reynolds
4.5.5.3.	A useful position	31	Euro 2007 Reynolds
4.6.	Spain	32	Euro 2007 Reynolds
4.6.1.	Overview	32	Euro 2007 Reynolds
4.6.2.	Customer bases	32	Euro 2007 Reynolds
4.6.3.	Strategy for Spain	32	Euro 2007 Reynolds
4.6.4.	Conclusions and comments	32	Euro 2007 Reynolds
1	Overview	1	Internat. 2008 Service
1.1.	Background	1	Internat. 2008 Service
1.2.	International common factors	1	Internat. 2008 Service
1.3.	OEMs v Independents	1	Internat. 2008 Service
1.4.	A Barrier for Systems Providers	2	Internat. 2008 Service
1.4.1.	Snap-on	2	Internat. 2008 Service
1.5.	Other evolutions in the Aftermarket	3	Internat. 2008 Service
	Figure 1.1. Participants in the OEMs' "Authorised" Service Structure	4	Internat. 2008 Service
	Figure 1.1. Key to Participants in the OEM' "Authorised" Service Structure	5	Internat. 2008 Service
	Figure 1.2. Participants in the "Independent" Service Structure	6	Internat. 2008 Service
2	Legislation's influence on the Aftermarket	7	Internat. 2008 Service
2.1.	A heavy load	7	Internat. 2008 Service
2.2.	OEM Parts & Service data	7	Internat. 2008 Service
2.3.	The rights of Independents	7	Internat. 2008 Service
2.3.1.	Interpretation of the regulations	7	Internat. 2008 Service
2.3.2.	Comment on data for Independents	8	Internat. 2008 Service
2.3.3.	A battle for survival	8	Internat. 2008 Service
2.3.4.	The future of Independents	8	Internat. 2008 Service
2.3.5.	Practical compromises	8	Internat. 2008 Service
2.4.	Multi-Brand operation by Dealers	9	Internat. 2008 Service
2.4.1.	The position of the DMS	9	Internat. 2008 Service
2.5.	Data Privacy	9	Internat. 2008 Service
2.6.	Supply of Parts	10	Internat. 2008 Service
2.6.1.	Dealer capabilities	10	Internat. 2008 Service
2.7.	Comments	10	Internat. 2008 Service
3	OEM Aftermarket Developments	11	Internat. 2008 Service
3.1.	Driven by Competition, Technology, Costs and Legislation	11	Internat. 2008 Service
3.2.	Focus on the DMS	12	Internat. 2008 Service
3.3.	Complex Service environments	12	Internat. 2008 Service
3.4.	The Customer Interface	12	Internat. 2008 Service
3.4.1.	Service appointments	12	Internat. 2008 Service
3.4.1.1.	Multiple types of system	12	Internat. 2008 Service
	Figure 3.1. OEM-related Systems dependent on the DMS	13	Internat. 2008 Service
3.4.2.	Repair Orders (R/O)	14	Internat. 2008 Service
3.4.2.1.	A further step by some	14	Internat. 2008 Service
3.4.3.	Service Marketing and "CRM"	14	Internat. 2008 Service
3.5.	Service Processes and Warranty	14	Internat. 2008 Service
3.5.1.	Comments on STAR and standards	15	Internat. 2008 Service
3.6.	Heavy demands on DMS Providers	16	Internat. 2008 Service
3.6.1.	A bottle-neck in the business	16	Internat. 2008 Service
3.7.	OEM Central developments	16	Internat. 2008 Service
	Figure 3.2. DMS Service Module integrated with four "advanced" OEMs	17	Internat. 2008 Service
4	Systems and related Services in the Aftermarket	18	Internat. 2008 Service
4.1.	A widening range	18	Internat. 2008 Service
4.1.1.	Supporting 4 main Service Business Objectives	18	Internat. 2008 Service
4.1.2.	Europe v North America	18	Internat. 2008 Service
4.2.	Categories of Systems & Services	19	Internat. 2008 Service
4.2.1.	Component Suppliers	19	Internat. 2008 Service
4.2.2.	OEM involvement in DMS	19	Internat. 2008 Service
4.2.3.	OEM Parts & Technical data	20	Internat. 2008 Service
	Parts and Labour Operations Master	20	Internat. 2008 Service
	Service Menu	20	Internat. 2008 Service
	Technical Bulletins	20	Internat. 2008 Service
	Build Specifications	20	Internat. 2008 Service
	EPCs	20	Internat. 2008 Service
	TIS	20	Internat. 2008 Service
	Recall/Campaign data	20	Internat. 2008 Service
	Service History - especially Warranty	20	Internat. 2008 Service
4.2.4.	EPCs and TIS	20	Internat. 2008 Service
4.2.4.1.	Changing role for Specialists	21	Internat. 2008 Service
4.2.4.2.	Changes for DMS Providers	21	Internat. 2008 Service
4.2.4.3.	Specialist Providers of EPC and TIS	21	Internat. 2008 Service
4.2.5.	Diagnosis and control of Repairs	21	Internat. 2008 Service

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
4.2.5.1.	Specialists in this category	22	Internat. 2008 Service
4.2.6.	OEM Warranty Management	22	Internat. 2008 Service
4.2.7.	OEM Web Portals	23	Internat. 2008 Service
4.2.8.	The Dealers' DMS	24	Internat. 2008 Service
4.2.8.1.	Competition in some functional areas	24	Internat. 2008 Service
4.2.8.2.	Specialist integration with the DMS	24	Internat. 2008 Service
4.2.9.	OEM Diagnostic systems	24	Internat. 2008 Service
4.2.9.1.	Diagnostics in the Independent Sector	24	Internat. 2008 Service
4.2.10.	On-line Service Appointments	24	Internat. 2008 Service
	Specialists who were acquired by the two major DMS Providers	25	Internat. 2008 Service
	Independent Specialists	25	Internat. 2008 Service
4.2.10.1.	Two OEMs were pioneers	25	Internat. 2008 Service
4.2.10.2.	Specialist DSPs	26	Internat. 2008 Service
4.2.10.3.	Appointments by other methods	27	Internat. 2008 Service
4.2.11.	Service Marketing and "CRM"	27	Internat. 2008 Service
4.2.12.	Service Support and Productivity Improvement	28	Internat. 2008 Service
4.2.12.1.	Fleet Service Authorisations	28	Internat. 2008 Service
4.2.12.2.	Inspection management	29	Internat. 2008 Service
4.2.12.3.	Productivity Improvement	30	Internat. 2008 Service
5	Snap-on	31	Internat. 2008 Service
5.1.	Probably the widest range in the Aftermarket	31	Internat. 2008 Service
5.2.	Corporate structure	31	Internat. 2008 Service
5.3.	Diagnostics & Information Division	31	Internat. 2008 Service
5.4.	Snap-on in the Independent Sector	32	Internat. 2008 Service
5.4.1.	Overview	32	Internat. 2008 Service
5.4.2.	Diagnostic Systems	32	Internat. 2008 Service
	Independents	32	Internat. 2008 Service
	Authorised	32	Internat. 2008 Service
5.4.3.	Technical Information Systems	32	Internat. 2008 Service
	Figure 5.1. Snap-on's Aftermarket Systems and Data	33	Internat. 2008 Service
5.4.4.	Repairer Management Systems	34	Internat. 2008 Service
5.4.5.	ShopStream	34	Internat. 2008 Service
	Figure 5.2. ShopStream managing work-flow in a Repairer's Shop	35	Internat. 2008 Service
5.4.6.	Standards for interconnection	36	Internat. 2008 Service
5.4.6.1.	A note on ASAnet in Europe	36	Internat. 2008 Service
5.5.	Snap-on in the Authorised Sector	36	Internat. 2008 Service
5.5.1.	Overview	36	Internat. 2008 Service
5.5.2.	Electronic Parts Catalogs	36	Internat. 2008 Service
5.5.3.	Diagnostic Systems	37	Internat. 2008 Service
	Ford - IDS - Integrated Diagnostic System	37	Internat. 2008 Service
	Toyota Techstream Diagnostic	37	Internat. 2008 Service
	Volvo Car - Specific Component Tester	38	Internat. 2008 Service
5.5.4.	Accessory Sales System	38	Internat. 2008 Service
5.5.5.	Warranty Management	39	Internat. 2008 Service
5.6.	Comment on Snap-on	39	Internat. 2008 Service
6	Six Aftermarket Specialists	40	Internat. 2008 Service
6.1.	An indication of the width of the market	40	Internat. 2008 Service
6.2.	Autoconnect (UK)	41	Internat. 2008 Service
6.2.1.	Automating Heavy Truck Inspections	41	Internat. 2008 Service
6.2.2.	Visual Heath Check (VHC)	41	Internat. 2008 Service
6.2.3.	Smartflow	41	Internat. 2008 Service
6.2.3.1.	Technical data for Technicians	41	Internat. 2008 Service
6.2.3.	Technical data for Technicians	41	Internat. 2008 Service
6.2.4.	VHC Management system	41	Internat. 2008 Service
	Figure 6.2.1. Autoconnect Smartflow Inspection sheet building	42	Internat. 2008 Service
6.2.5.	Truckfile	43	Internat. 2008 Service
6.2.6.	Treadcheck Project	44	Internat. 2008 Service
	Figure 6.2.2. Treadcheck - overview	44	Internat. 2008 Service
6.3.	Clifford Thames and PC Services (UK)	46	Internat. 2008 Service
6.3.1.	Systems for Service Inspections and Fleet "OEM" central billing	46	Internat. 2008 Service
6.3.2.	Fleet Service Processing	46	Internat. 2008 Service
	Figure 6.3.1. CT's Fleet Service Processing	46	Internat. 2008 Service
6.3.3.	OEM objectives	47	Internat. 2008 Service
6.3.4.	FSP functions	47	Internat. 2008 Service
	Figure 6.3.2. CT's Menu Pricing for FSP	47	Internat. 2008 Service
6.3.4.	PC Services - Vehicle Inspections	48	Internat. 2008 Service
	Figure 6.3.3. PC Services Qcheck	48	Internat. 2008 Service
6.4.	Mobile Productivity Inc. - MPi (USA)	49	Internat. 2008 Service
6.4.1.	Advanced Vehicle Inspection Process with Diagnostic support	49	Internat. 2008 Service
6.4.2.	Organisation - the start	49	Internat. 2008 Service
6.4.2.1.	Organisation - structure	49	Internat. 2008 Service
	EDGE (ARGIS)	49	Internat. 2008 Service

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
	Identifix	49	Internat. 2008 Service
	iATN - International Automotive Technicians Network	49	Internat. 2008 Service
6.4.3.	EDGE	49	Internat. 2008 Service
6.4.3.1.	Overview	49	Internat. 2008 Service
	Figure 6.4.1. MPI's EDGE Database and operational structure	50	Internat. 2008 Service
6.4.3.2.	The EDGE database	51	Internat. 2008 Service
6.4.3.3.	DMS Integration	51	Internat. 2008 Service
6.4.3.4.	Service Advisor's role	51	Internat. 2008 Service
6.4.3.5.	Technician's role	52	Internat. 2008 Service
6.4.3.6.	Management's role	52	Internat. 2008 Service
6.4.3.7.	Results	52	Internat. 2008 Service
6.4.4.	Dealer visit	53	Internat. 2008 Service
6.4.4.1.	Main characteristics of the Business	53	Internat. 2008 Service
6.4.4.2.	Use of EDGE	53	Internat. 2008 Service
6.4.4.3.	Comment	53	Internat. 2008 Service
6.5.	MSX International (MSXI)	54	Internat. 2008 Service
6.5.1.	Service systems at OEM and Dealer levels	54	Internat. 2008 Service
6.5.2.	MSXI - overview	54	Internat. 2008 Service
6.5.2.1.	Problems of the Service business	54	Internat. 2008 Service
	Figure 6.5.1. MSXI - overall range of operations	55	Internat. 2008 Service
6.5.2.2.	International Operations	56	Internat. 2008 Service
	Figure 6.5.2. MSXI - an overview of its Customers	56	Internat. 2008 Service
6.5.2.3.	The "Platforms"	57	Internat. 2008 Service
6.5.3.	Integrated Growth Solutions (IGS)	57	Internat. 2008 Service
6.5.3.1.	MSXI Dealer - Sustain Service Profits	57	Internat. 2008 Service
6.5.4.	Integrated Warranty Solutions (IWS)	57	Internat. 2008 Service
6.5.5.	Integrated Support Solutions (ISS)	58	Internat. 2008 Service
6.5.5.1.	Fleet Management Billing	58	Internat. 2008 Service
6.5.6.	Continuous Improvement Solutions (CIS)	59	Internat. 2008 Service
6.5.6.	Case histories - in outline	59	Internat. 2008 Service
6.5.6.1.	European OEM - IWS Project	59	Internat. 2008 Service
6.5.6.2.	Asian OEM - IGS Project - Service Operations in North America	59	Internat. 2008 Service
6.5.6.3.	Asian OEM - CLM Project - European Operations	59	Internat. 2008 Service
6.5.6.4.	American OEM - European Operations - ISS Project	60	Internat. 2008 Service
6.5.7.	Comment	60	Internat. 2008 Service
6.5.8.	MSX International acquired Actuate Business Solutions	60	Internat. 2008 Service
6.6.	OnStation - now owned by Cobalt (USA)	61	Internat. 2008 Service
6.6.1.	Automated Service Marketing and Customer Retention	61	Internat. 2008 Service
6.6.2.	Background to the system	61	Internat. 2008 Service
6.6.3.	System functions	61	Internat. 2008 Service
	Figure 6.6.1. Revenue increases	62	Internat. 2008 Service
	Figure 6.6.2. OnStation v Traditional "In-house"	62	Internat. 2008 Service
	Figure 6.3.3. Outline of Components of OnStation's system	62	Internat. 2008 Service
6.6.4.	Updated for Dealers	63	Internat. 2008 Service
6.6.4.1.	The current proposition for Dealers	63	Internat. 2008 Service
	Figure 6.6.4. OnStation - examples of Reports	64	Internat. 2008 Service
6.6.4.2.	More about "Advocates"	65	Internat. 2008 Service
6.6.4.3.	Prices	65	Internat. 2008 Service
6.6.5.	RMS and DMS Integration	65	Internat. 2008 Service
6.6.5.1.	Independent market	65	Internat. 2008 Service
6.6.5.2.	Authorised Dealer market	65	Internat. 2008 Service
6.6.6.	Comment on OnStation	65	Internat. 2008 Service
6.7.	Real Time Communications - RTC (UK)	66	Internat. 2008 Service
6.7.1.	Surrounding the DMS Service Module	66	Internat. 2008 Service
6.7.2.	RTC "before Manheim"	66	Internat. 2008 Service
6.7.2.1.	Partnership with Shell Oil	66	Internat. 2008 Service
6.7.2.2.	Customer base	66	Internat. 2008 Service
6.7.3.	IT components	66	Internat. 2008 Service
	Figure 6.7.1. RTC's Service Appointments & Customer Retention system	67	Internat. 2008 Service
6.7.3.1.	DMS Integration	67	Internat. 2008 Service
6.7.4.	RTC Functions - in outline	67	Internat. 2008 Service
6.7.5.	Installing RTC	69	Internat. 2008 Service
6.7.6.	More about Call Centre operation	69	Internat. 2008 Service
6.7.7.	Delivery and Costs	69	Internat. 2008 Service
6.7.8.	Comment on RTC	70	Internat. 2008 Service
6.7.9.	A Customer's experience with RTC - Hendy Group	70	Internat. 2008 Service
6.7.9.1.	Call Centre	71	Internat. 2008 Service
6.7.9.2.	Workshop Management	71	Internat. 2008 Service
6.7.9.3.	DMS integration	71	Internat. 2008 Service
6.7.9.4.	Results	71	Internat. 2008 Service
6.7.9.5.	Comment	71	Internat. 2008 Service
1	A complex situation	1	USA 2008 Interconnect

Section	Section Heading	Page	Document short title
1.1.	At the OEM level	1	USA 2008 Interconnect
1.2.	Dealers' Business Partners	1	USA 2008 Interconnect
1.3.	A major "sub-industry"	1	USA 2008 Interconnect
1.3.1.	Uncertainty about DMS security	1	USA 2008 Interconnect
1.4.	Reynolds and Reynolds "closed the door"	2	USA 2008 Interconnect
1.5.	System interconnections in Europe	2	USA 2008 Interconnect
1.6.	A special case in the USA	2	USA 2008 Interconnect
1.7.	Topics covered by this Analysis	2	USA 2008 Interconnect
	Figure 1. Overview of System Interconnections in North America	4	USA 2008 Interconnect
2	Structure and Politics of the business	5	USA 2008 Interconnect
2.1.	Technology is not the primary factor	5	USA 2008 Interconnect
	Figure 2.1. Factors which determine how the Market operates	5	USA 2008 Interconnect
2.2.	Factor 1 - Facilitating Business	5	USA 2008 Interconnect
2.3.	Factor 2 - OEMs - Network Management and Competitive Advantage	5	USA 2008 Interconnect
2.4.	Factor 3 - Revenues and Profits	6	USA 2008 Interconnect
2.4.1.	Specialist Service Providers	6	USA 2008 Interconnect
2.4.2.	Competitive advantage	6	USA 2008 Interconnect
2.5.	Factor 4 - The "Specialists"	6	USA 2008 Interconnect
2.5.1.	Integration & Data Exchange	7	USA 2008 Interconnect
2.5.2.	Specialist DSPs	7	USA 2008 Interconnect
	Figure 2.2. Complex world of the Specialists	7	USA 2008 Interconnect
2.5.2.1.	"Code on the Box"	8	USA 2008 Interconnect
2.5.2.2.	Access via the "Modem"	8	USA 2008 Interconnect
2.6.	Factor 5 - Technology	8	USA 2008 Interconnect
2.6.1.	The first complication	8	USA 2008 Interconnect
2.6.2.	The second complication	8	USA 2008 Interconnect
2.6.3.	The third complication	8	USA 2008 Interconnect
2.6.4.	It could have been worse	8	USA 2008 Interconnect
3	STAR - Objectives, Progress to-date and Limitations	9	USA 2008 Interconnect
3.1.	STAR - the organisation	9	USA 2008 Interconnect
3.1.1.	STAR's History	9	USA 2008 Interconnect
3.2.	The role of STAR	9	USA 2008 Interconnect
3.2.1.	Staff	10	USA 2008 Interconnect
3.2.1.1.	Commercial realities	10	USA 2008 Interconnect
3.2.2.	Not surprising	10	USA 2008 Interconnect
3.3.	Standards delivered to-date - first set	10	USA 2008 Interconnect
3.4.	Standards delivered to-date - second set	10	USA 2008 Interconnect
	Figure 3.1. STAR Standards delivered - File Transfer - DTS	10	USA 2008 Interconnect
	Figure 3.2. STAR Standards delivered to-date - XML based BODS	11	USA 2008 Interconnect
	Figure 3.3. STAR Members - 2008	12	USA 2008 Interconnect
3.5.	All available at no charge	13	USA 2008 Interconnect
3.6.	STAR's impact on the market	13	USA 2008 Interconnect
3.6.1.	Positive results	13	USA 2008 Interconnect
3.6.1.1.	Case studies	13	USA 2008 Interconnect
3.6.2.	STAR's current objectives	13	USA 2008 Interconnect
3.6.2.1.	A complication	14	USA 2008 Interconnect
3.7.	Where the impact is "partial"	14	USA 2008 Interconnect
3.8.	Conclusions	15	USA 2008 Interconnect
4	Specialists in the Interconnections Business - Overview	16	USA 2008 Interconnect
4.1.	The Specialists covered	16	USA 2008 Interconnect
4.2.	OEM "DCS" applications	16	USA 2008 Interconnect
4.2.1.	Mode of operation	16	USA 2008 Interconnect
	Figure 4.1. OEM "DCS" Interconnections	17	USA 2008 Interconnect
	Figure 4.2. Specialist DSP and DMS Interconnections	17	USA 2008 Interconnect
4.3.	Data exchanges and enhancement	18	USA 2008 Interconnect
4.3.1.	Mode of operation	18	USA 2008 Interconnect
4.4.	Connecting Specialist systems to DMS	18	USA 2008 Interconnect
4.5.	Something missing from the market?	18	USA 2008 Interconnect
4.6.	Other types of "Interconnection"	19	USA 2008 Interconnect
4.7.	Reviews of the Specialists	19	USA 2008 Interconnect
4.7.1.	Market positions	19	USA 2008 Interconnect
4.7.2.	"Do it yourself"	19	USA 2008 Interconnect
4.7.3.	Differences between the "Big 3"	19	USA 2008 Interconnect
4.8.	OSA - Open Secure Access	19	USA 2008 Interconnect
4.8.1.	A brief history	19	USA 2008 Interconnect
4.8.2.	What was R&R proposing?	20	USA 2008 Interconnect
4.8.3.	Complex arguments	20	USA 2008 Interconnect
4.8.4.	Later developments	21	USA 2008 Interconnect
4.8.5.	The current situation	21	USA 2008 Interconnect
5	ADP Dealer Services	23	USA 2008 Interconnect
5.1.	iServer	23	USA 2008 Interconnect
5.1.1.	External - OEM DCS connections	23	USA 2008 Interconnect

Section	Section Heading	Page	Document short title
5.1.1.1.	One concern has been removed	24	USA 2008 Interconnect
5.1.2.	Internal - Connection of "Sub-systems"	24	USA 2008 Interconnect
5.1.3.	3rd Party connections	24	USA 2008 Interconnect
5.1.4.	Comment on the iServer	24	USA 2008 Interconnect
5.2.	Credit Gateway	24	USA 2008 Interconnect
5.2.1.	Comment on the Credit Gateway	24	USA 2008 Interconnect
	Figure 5.1.ADP's Interconnections	25	USA 2008 Interconnect
5.3.	Third Party Access Program	26	USA 2008 Interconnect
5.3.1.	The "old way"	26	USA 2008 Interconnect
5.3.2.	The "new way"	26	USA 2008 Interconnect
5.3.3.	The new Policy	26	USA 2008 Interconnect
5.3.3.1.	Increased emphasis on DMi	26	USA 2008 Interconnect
	Figure 5.2. ADP "Approved Vendors"	27	USA 2008 Interconnect
5.3.4.	Three levels of access	28	USA 2008 Interconnect
5.3.5.	Five Access Methods	28	USA 2008 Interconnect
5.3.5.1.	VPN Access	28	USA 2008 Interconnect
5.3.5.2.	Vendor Programming Access	28	USA 2008 Interconnect
5.3.5.3.	Report Automation	29	USA 2008 Interconnect
5.3.5.4.	Cleansed and Standardised Extraction	29	USA 2008 Interconnect
5.3.5.5.	Bi-Directional Integration	29	USA 2008 Interconnect
5.3.5.6.	Comment on ADP's tools	29	USA 2008 Interconnect
5.3.6.	Information on the Web site	30	USA 2008 Interconnect
5.7.	Conclusions	30	USA 2008 Interconnect
6	Reynolds and Reynolds	31	USA 2008 Interconnect
6.1.	Multiple interconnections	31	USA 2008 Interconnect
6.1.1.	Comment on the Gateway	31	USA 2008 Interconnect
	Figure 6.1. Overview of R&R's Interconnections - an evolving situation	32	USA 2008 Interconnect
6.2.	Transition to a common structure	33	USA 2008 Interconnect
	Figure 6.2. R&R's Hub Structure - direction of development	33	USA 2008 Interconnect
6.2.1.	Comment on Transition	34	USA 2008 Interconnect
6.3.	More about RCI	35	USA 2008 Interconnect
6.3.1.	Does it cover ERA and POWER?	35	USA 2008 Interconnect
6.3.2.	Which Functions does it cover?	35	USA 2008 Interconnect
6.3.3.	Who is allowed to use it?	35	USA 2008 Interconnect
6.3.3.1.	Waiting time	35	USA 2008 Interconnect
6.3.3.2.	Which data interfaces are required?	35	USA 2008 Interconnect
	Figure 6.3. Reynolds & Reynolds - 3rd Party Certification status	36	USA 2008 Interconnect
6.3.4.	On what terms?	38	USA 2008 Interconnect
6.4.	What caused the formation of OSA, and... Was it needed?	38	USA 2008 Interconnect
6.4.1.	No DMi equivalent	38	USA 2008 Interconnect
6.4.2.	Are all of the issues resolved	38	USA 2008 Interconnect
6.4.3.	Comment on the effect of OSA	38	USA 2008 Interconnect
6.5.	Conclusions	39	USA 2008 Interconnect
6.6.	The role of ADP and Reynolds and Reynolds	40	USA 2008 Interconnect
6.6.1.	The opportunity to dominate	40	USA 2008 Interconnect
6.6.2.	Customers also have influence	40	USA 2008 Interconnect
6.6.3.	"Open" can work in two directions	40	USA 2008 Interconnect
6.6.4.	Even so...	40	USA 2008 Interconnect
6.6.5.	What about STAR?	40	USA 2008 Interconnect
7	Oxlo - a Specialist with an interconnections Hub	41	USA 2008 Interconnect
7.1.	Basis of the business	41	USA 2008 Interconnect
7.2.	Business to-date - Overview	41	USA 2008 Interconnect
7.2.1.	Business to-date - OEM Customers	41	USA 2008 Interconnect
7.2.2.	Business to-date - Other Customers	42	USA 2008 Interconnect
7.2.3.	Business to-date - VW Credit (VCI)	42	USA 2008 Interconnect
	Figure 7.1. Oxlo's Business Partners	43	USA 2008 Interconnect
7.3.	Oxlo's Services in more detail	44	USA 2008 Interconnect
7.3.1.	Step-by-step development	44	USA 2008 Interconnect
7.3.2.	The "Hub"	44	USA 2008 Interconnect
7.3.3.	Self-Service Integration	44	USA 2008 Interconnect
7.3.4.	The "Host"	44	USA 2008 Interconnect
7.4.	Comments and Conclusions	45	USA 2008 Interconnect
8	Five other Specialists in "Interconnections"	46	USA 2008 Interconnect
8.0.1.	Technical" Specialists	46	USA 2008 Interconnect
	Figure 8.1. Typical Specialist "Hub" structure	46	USA 2008 Interconnect
8.0.2.	"Application" Specialists	46	USA 2008 Interconnect
8.1.	Drive Technology Group (DTG)	47	USA 2008 Interconnect
8.1.1.	Background	47	USA 2008 Interconnect
8.1.2.	DriveWay - for system interconnections	47	USA 2008 Interconnect
8.1.3.	Customers	47	USA 2008 Interconnect
8.1.4.	Pricing	47	USA 2008 Interconnect
8.1.5.	Comment on Drive Technology	47	USA 2008 Interconnect

Section	Section Heading	Page	Document short title
8.2.	IntegraLink - part of Cobalt	48	USA 2008 Interconnect
8.2.1.	Background	48	USA 2008 Interconnect
8.2.2.	Interconnection Services provided	48	USA 2008 Interconnect
8.2.3.	Pricing of services	48	USA 2008 Interconnect
8.2.4.	SMART	49	USA 2008 Interconnect
8.2.5.	Customers	49	USA 2008 Interconnect
8.2.6.	Comment on IntegraLink... and Cobalt	49	USA 2008 Interconnect
8.3.	SelectQu and DataCube (Dominion Enterprises)	50	USA 2008 Interconnect
8.3.1.	Background	50	USA 2008 Interconnect
8.3.2.	Interconnection Services provided	50	USA 2008 Interconnect
8.3.3.	Associated Company - DataCube	50	USA 2008 Interconnect
8.3.4.	Customers	50	USA 2008 Interconnect
8.3.5.	Comment on SelectQu	50	USA 2008 Interconnect
8.4.	Superior Integrated Solutions (SIS) - related to MenuVantage	51	USA 2008 Interconnect
8.4.1.	Background	51	USA 2008 Interconnect
8.4.2.	Interconnection Services provided	51	USA 2008 Interconnect
8.4.3.	Customers	51	USA 2008 Interconnect
8.4.4.	Comment on SIS	51	USA 2008 Interconnect
8.5.	"VinPlus" - now Netlink	52	USA 2008 Interconnect
8.5.1.	Background	52	USA 2008 Interconnect
8.5.2.	Interconnection Services provided	52	USA 2008 Interconnect
8.5.3.	Customers	53	USA 2008 Interconnect
8.5.4.	Comment on VinPlus/Netlink	53	USA 2008 Interconnect
	Figure 8.5.1. VinPlus Dataware XNet	53	USA 2008 Interconnect
9	Conclusions on North America	54	USA 2008 Interconnect
10	The situation in Europe	55	USA 2008 Interconnect
1	Overview	1	Internat. 2008 SAP-2
	Figure 1. Countries with DBM or other SAP ERP-based DMS customers	2	Internat. 2008 SAP-2
	A reminder of the realities of the DMS markets	2	Internat. 2008 SAP-2
2	The first four years in the DMS business	3	Internat. 2008 SAP-2
2.1.	Useful progress with DBM	3	Internat. 2008 SAP-2
2.1.1.	Not only DBM	3	Internat. 2008 SAP-2
2.2.	Significant numbers of licences	3	Internat. 2008 SAP-2
2.2.1.	Many more already "ordered"	3	Internat. 2008 SAP-2
2.3.	Selling directly and via Partners	4	Internat. 2008 SAP-2
2.3.1.	Partner changes	4	Internat. 2008 SAP-2
2.4.	Product development	4	Internat. 2008 SAP-2
2.4.1.	The "Original" DBM Version 5.0	4	Internat. 2008 SAP-2
2.4.2.	The "Current" DBM Version 6.0	4	Internat. 2008 SAP-2
2.4.3.	Future DBM Versions	4	Internat. 2008 SAP-2
2.4.4.	Development resources	5	Internat. 2008 SAP-2
2.4.4.1.	OEM Integrations	5	Internat. 2008 SAP-2
2.5.	DBM Marketing	5	Internat. 2008 SAP-2
2.6.	Non-DBM DMS - their future	5	Internat. 2008 SAP-2
2.7.	Comment on SAP	6	Internat. 2008 SAP-2
2.8.	Glossary of Names and Acronyms	7	Internat. 2008 SAP-2
3	AMAG - VW Importer - Switzerland - Part of a SAP Systems Chain	8	Internat. 2008 SAP-2
3.1.	Some background information on VW in Europe	9	Internat. 2008 SAP-2
3.1.1.	The market in Switzerland	10	Internat. 2008 SAP-2
3.1.1.1.	A few primary statistics	10	Internat. 2008 SAP-2
3.1.1.2.	Multiple Languages	10	Internat. 2008 SAP-2
3.2.	AMAG - Overview of the business	11	Internat. 2008 SAP-2
	Figure 3.1. AMAG Organisation (Simplified)	11	Internat. 2008 SAP-2
3.3.	AMAG - Systems Structure	12	Internat. 2008 SAP-2
3.3.1.	Importer Business	12	Internat. 2008 SAP-2
3.3.2.	Add-on Applications for Dealers	12	Internat. 2008 SAP-2
3.3.3.	External Systems	12	Internat. 2008 SAP-2
3.3.4.	AMAG-owned Dealers	12	Internat. 2008 SAP-2
3.3.5.	Independently-owned Dealers	12	Internat. 2008 SAP-2
	Figure 3.2. AMAG Systems - overall structure (simplified)	12	Internat. 2008 SAP-2
3.4.	The AMAG Integrated Dealer Application (SAP DBM) Project	13	Internat. 2008 SAP-2
3.4.1.	A brief view of VADIS	13	Internat. 2008 SAP-2
3.4.1.1.	A few VADIS facts	13	Internat. 2008 SAP-2
3.4.2.	The AIDA Project - timescale	14	Internat. 2008 SAP-2
3.4.3.	The selection process	14	Internat. 2008 SAP-2
3.4.4.	Project Organisation	14	Internat. 2008 SAP-2
3.4.4.1.	Project personnel - Pilot phase	15	Internat. 2008 SAP-2
3.4.4.2.	Dealer Business Processes	15	Internat. 2008 SAP-2
3.4.4.3.	Pilot implementation	15	Internat. 2008 SAP-2
3.4.4.4.	Results of Pilot implementation	16	Internat. 2008 SAP-2
3.4.4.5.	Project personnel - Roll-out phase	16	Internat. 2008 SAP-2
3.4.5.	Content of AIDA	16	Internat. 2008 SAP-2

Section	Section Heading	Page	Document short title
	Figure 3.3. AMAG Systems including AIDA	16	Internat. 2008 SAP-2
3.4.5.1.	DBM modules	17	Internat. 2008 SAP-2
3.4.5.2.	Interfaces to other applications	17	Internat. 2008 SAP-2
3.4.5.3.	Comment on AIDA	17	Internat. 2008 SAP-2
3.5.	Visits to Dealers	18	Internat. 2008 SAP-2
3.5.1.	Dulliken	18	Internat. 2008 SAP-2
	Figure 3.4. AMAG Dulliken	18	Internat. 2008 SAP-2
	Figure 3.5. AMAG Schinznach-Bad	19	Internat. 2008 SAP-2
3.5.2.	Schinznach-Bad	20	Internat. 2008 SAP-2
3.5.3.	Conclusions on the visits	21	Internat. 2008 SAP-2
3.5.3.1.	A comment on Dealer visits	21	Internat. 2008 SAP-2
3.5.3.2.	A good reference for SAP and IMG	22	Internat. 2008 SAP-2
4	WEGOS - Partner of MAN and SAP - A DMS Provider tuned to its market	23	Internat. 2008 SAP-2
4.1.	MAN's systems structure - overview	23	Internat. 2008 SAP-2
4.1.1.	Systems for wholly-owned Dealers	23	Internat. 2008 SAP-2
4.1.2.	Systems for Independently-owned Dealers	23	Internat. 2008 SAP-2
4.1.3.	Truck Network characteristics	23	Internat. 2008 SAP-2
	Figure 4.1. MAN Systems Structure (Simplified - Germany, Austria, Switzerland)	24	Internat. 2008 SAP-2
4.1.3.1.	Perhaps economics will force change	25	Internat. 2008 SAP-2
4.1.3.2.	Related businesses	25	Internat. 2008 SAP-2
4.1.4.	The main interest of this review	25	Internat. 2008 SAP-2
4.2.	Beyond the normal reach of SAP	25	Internat. 2008 SAP-2
4.2.1.	How can it be profitable for WEGOS?	25	Internat. 2008 SAP-2
4.2.2.	Plans for DBM	26	Internat. 2008 SAP-2
4.3.	Background of WEGOS	26	Internat. 2008 SAP-2
4.3.1.	Vidicom	26	Internat. 2008 SAP-2
4.3.1.1.	Comment on Vidicom	26	Internat. 2008 SAP-2
4.4.	WEGOS and MANAGE	27	Internat. 2008 SAP-2
4.4.1.	MANAGE - development platform	27	Internat. 2008 SAP-2
4.4.2.	Differences between ESA and MANAGE	27	Internat. 2008 SAP-2
4.4.3.	MANAGE - interfaces to MAN	27	Internat. 2008 SAP-2
	Figure 4.2. WEGOS MANAGE DMS structure	28	Internat. 2008 SAP-2
4.4.4.	MANAGE Applications - more detail	28	Internat. 2008 SAP-2
4.4.4.1.	A future extension	29	Internat. 2008 SAP-2
4.4.4.2.	Customer Contact Management	29	Internat. 2008 SAP-2
4.4.5.	Delivery plan for MANAGE	29	Internat. 2008 SAP-2
4.4.6.	The "legacy" WEGOS DMS	29	Internat. 2008 SAP-2
4.4.6.1.	Why change from WEGOS?	30	Internat. 2008 SAP-2
4.4.6.2.	One Dealer's experience with MANAGE	30	Internat. 2008 SAP-2
4.4.7.	Comment on the Partner and the DMS	30	Internat. 2008 SAP-2
4.5.	Staiger Gruppe - A very interesting user of MANAGE	31	Internat. 2008 SAP-2
	Figure 4.3. Staiger Gruppe - MAN Independently-owned Dealer	31	Internat. 2008 SAP-2
4.5.1.	The Dealer	32	Internat. 2008 SAP-2
4.5.1.1.	Multiple Departments	32	Internat. 2008 SAP-2
4.5.1.2.	Brief history of the Business	32	Internat. 2008 SAP-2
4.5.2.	Brief history of the Systems	32	Internat. 2008 SAP-2
4.5.2.1.	WEGOS DMS	32	Internat. 2008 SAP-2
4.5.2.2.	MANAGE DMS	32	Internat. 2008 SAP-2
	Figure 4.4. Staiger's systems - overview	33	Internat. 2008 SAP-2
4.5.3.	MANAGE in operation	33	Internat. 2008 SAP-2
4.5.4.	Service Manager's viewpoint	34	Internat. 2008 SAP-2
4.5.5.	Top management viewpoint	34	Internat. 2008 SAP-2
4.5.5.1.	Net gains	34	Internat. 2008 SAP-2
4.5.5.2.	Wishes for additions and changes	35	Internat. 2008 SAP-2
4.5.6.	Conclusions	35	Internat. 2008 SAP-2
4.5.6.1.	The future of Truck Service Dealers	35	Internat. 2008 SAP-2
3.6.	MAN's DMS Project - 2004 review (included for reference)	35	Internat. 2008 SAP-2
	European Developments & Trends - January 2004 - Volume 1	36	Internat. 2008 SAP-2
13	MAN Trucks - SAP • DCS Auto • ASP • DMS	36	Internat. 2008 SAP-2
13.1.	Background to the ESA project	36	Internat. 2008 SAP-2
13.1.1.	The platform selected	36	Internat. 2008 SAP-2
	Figure 13.1. MAN's infrastructure for Truck and Dealer support in Europe	37	Internat. 2008 SAP-2
13.1.2.	DCS Auto and SAP	38	Internat. 2008 SAP-2
13.1.3.	DCS Auto and MAN	38	Internat. 2008 SAP-2
13.1.3.1.	Service module development	38	Internat. 2008 SAP-2
13.1.3.2.	Independent Dealer version	38	Internat. 2008 SAP-2
13.2.	Overview of the ESA Project	38	Internat. 2008 SAP-2
	Figure 13.2. ESA structure and related MAN systems	39	Internat. 2008 SAP-2
	Figure 13.3. MAN's ESA Service Module - 1	40	Internat. 2008 SAP-2
	Figure 13.3. MAN's ESA Service Module - 2	41	Internat. 2008 SAP-2
13.2.1.	Elements of the Service module	42	Internat. 2008 SAP-2
13.2.2.	Related systems	42	Internat. 2008 SAP-2

Section	Section Heading	Page	Document short title
13.2.3.	SAP Revisions	42	Internat. 2008 SAP-2
13.3.	Comment on MAN's project	42	Internat. 2008 SAP-2
5	MHP - Partner of SAP, subsidiary of Porsche	43	Internat. 2008 SAP-2
5.1.	SAP and its Partners	43	Internat. 2008 SAP-2
5.1.1.	Mieschke Hofmann und Partner - brief history	43	Internat. 2008 SAP-2
	Figure 5.1. MHP's growth in Revenues and Employees - 2001 to 2007	43	Internat. 2008 SAP-2
5.1.2.	MHP's SAP Partner status	44	Internat. 2008 SAP-2
5.1.3.	MHP's other Dealer activities	44	Internat. 2008 SAP-2
5.1.4.	ex-DCS Automotive customers	44	Internat. 2008 SAP-2
5.2.	SAP's FICO for Groups with "other" DMS	44	Internat. 2008 SAP-2
5.2.1.	Dealer Group Partners	44	Internat. 2008 SAP-2
5.2.2.	Components of the "Superstructure"	45	Internat. 2008 SAP-2
5.2.3.	Marketing the "Superstructure"	45	Internat. 2008 SAP-2
5.3.	DBM adaptations	45	Internat. 2008 SAP-2
	Figure 5.2. MHP's "SAP superstructure" for Groups	45	Internat. 2008 SAP-2
5.3.1.	DBM- based Workshop system	46	Internat. 2008 SAP-2
5.3.1.1.	Modifications to DBM	46	Internat. 2008 SAP-2
5.3.1.2.	Comment on Modifications	46	Internat. 2008 SAP-2
	Figure 5.3. Indication of modified Workshop Order Status Screen	46	Internat. 2008 SAP-2
5.3.2.	DBM- based Fleet Management	47	Internat. 2008 SAP-2
5.3.2.1.	Modifications to DBM	47	Internat. 2008 SAP-2
5.3.2.2.	Comment on Modifications	47	Internat. 2008 SAP-2
5.4.	Conclusions on MHP in the "Dealer world"	47	Internat. 2008 SAP-2
	Preface	1	Internat. 2008 GM Strat.
	Glossary of Names and Acronyms	2	Internat. 2008 GM Strat.
1	Introduction	3	Internat. 2008 GM Strat.
1.1.	A vision of the "Ideal Network"	3	Internat. 2008 GM Strat.
1.2.	Realities	3	Internat. 2008 GM Strat.
1.2.1.	Supply difficulties	3	Internat. 2008 GM Strat.
1.3.	Aiming for the best compromise	3	Internat. 2008 GM Strat.
1.4.	Weakest and Strongest link	4	Internat. 2008 GM Strat.
1.5.	GM's Strategy	4	Internat. 2008 GM Strat.
1.6.	This Analysis	4	Internat. 2008 GM Strat.
1.6.1.	Situations of other OEMs	4	Internat. 2008 GM Strat.
1.7.	GM's Global Operations - in outline	5	Internat. 2008 GM Strat.
2	Overview	6	Internat. 2008 GM Strat.
2.1.	Evolution of the Strategy	6	Internat. 2008 GM Strat.
	Figure 2.1. GM's overall Dealer Systems Structure - in outline	7	Internat. 2008 GM Strat.
2.1.2.	Consultation with Dealers	8	Internat. 2008 GM Strat.
2.2.	GM's Objective	8	Internat. 2008 GM Strat.
2.2.1.	The Saturn example	9	Internat. 2008 GM Strat.
2.2.2.	High level objective	9	Internat. 2008 GM Strat.
2.2.3.	Forceful implementation	10	Internat. 2008 GM Strat.
2.2.4.	Flexibility and practical compromises	10	Internat. 2008 GM Strat.
2.3.	GM's Systems Structure	10	Internat. 2008 GM Strat.
2.3.1.	Five "layers" of systems	11	Internat. 2008 GM Strat.
3	GM's Global Dealer Systems in more detail	14	Internat. 2008 GM Strat.
3.1.	Almost the complete Dealer business	14	Internat. 2008 GM Strat.
3.1.1.	Six levels of Endorsed Systems for Dealers	14	Internat. 2008 GM Strat.
3.1.1.1.	Connections between vehicles and GM - OnStar	14	Internat. 2008 GM Strat.
	Figure 3.1. GM's Endorsed Dealer Systems - USA - 6 Levels	15	Internat. 2008 GM Strat.
3.2.	Level 1 - Dealer Web sites... and more	16	Internat. 2008 GM Strat.
3.2.1.	Content of the package	16	Internat. 2008 GM Strat.
	Figure 3.2. Cobalt Web sites, Search Engine Management and link to OneSource	16	Internat. 2008 GM Strat.
3.2.2.	Comment on the package	17	Internat. 2008 GM Strat.
3.3.	Level 2 - Lead Management and CRM	17	Internat. 2008 GM Strat.
3.3.1.	Source of the system	17	Internat. 2008 GM Strat.
3.3.2.	Structure of OneSource	17	Internat. 2008 GM Strat.
3.3.2.1.	Multiple choice of Lead Managers	17	Internat. 2008 GM Strat.
	Figure 3.3. Position of SCI-Torque in GM's Dealer Systems Structure	18	Internat. 2008 GM Strat.
3.3.3.	OneSource Lead Manager Functions	18	Internat. 2008 GM Strat.
3.3.4.	More about reporting	19	Internat. 2008 GM Strat.
3.3.5.	Possible future extensions	19	Internat. 2008 GM Strat.
3.3.6.	OneSource LM Training	20	Internat. 2008 GM Strat.
3.3.7.	OneSource Costs	20	Internat. 2008 GM Strat.
3.3.8.	Comment on OneSource	20	Internat. 2008 GM Strat.
3.4.	Level 3 - GlobalConnect and Exchange	21	Internat. 2008 GM Strat.
3.5.	Level 4 - WorkBenches and other Dealer applications	22	Internat. 2008 GM Strat.
3.5.1.	Background	22	Internat. 2008 GM Strat.
3.5.2.	Order WorkBench	22	Internat. 2008 GM Strat.
3.5.3.	Sales WorkBench	22	Internat. 2008 GM Strat.
3.5.3.1.	Functions in more detail	23	Internat. 2008 GM Strat.

Section	Section Heading	Page	Document short title
3.5.3.2.	Comment on the Sales WorkBench	24	Internat. 2008 GM Strat.
3.5.4.	Service WorkBench	25	Internat. 2008 GM Strat.
3.5.5.	Parts WorkBench	25	Internat. 2008 GM Strat.
3.5.6.	Business Management WorkBench	26	Internat. 2008 GM Strat.
3.5.7.	Comment on the WorkBench strategy	26	Internat. 2008 GM Strat.
3.5.8.	WorkBench and other Level 4 differences in Europe	27	Internat. 2008 GM Strat.
3.5.8.1.	Order WorkBench	27	Internat. 2008 GM Strat.
3.5.8.2.	Sales WorkBench	27	Internat. 2008 GM Strat.
3.5.8.3.	GMAC	27	Internat. 2008 GM Strat.
3.5.8.4.	RIM and other Parts Systems	28	Internat. 2008 GM Strat.
3.5.9.	GME RSL Parts Distribution Centre	29	Internat. 2008 GM Strat.
	Figure 3.4. Opel RSL - Parts Distribution Centre of Auto-Staiger	30	Internat. 2008 GM Strat.
3.6.	Level 5 - DMS	31	Internat. 2008 GM Strat.
3.6.1.	Long-term objective	31	Internat. 2008 GM Strat.
3.6.1.1.	The "interim" situation	31	Internat. 2008 GM Strat.
3.6.2.	IDMS in the USA and Canada	31	Internat. 2008 GM Strat.
3.6.2.1.	The basis of IDMS	32	Internat. 2008 GM Strat.
3.6.2.2.	DSPs providing IDMS	32	Internat. 2008 GM Strat.
3.6.2.3.	Progress of IDMS	33	Internat. 2008 GM Strat.
3.6.2.4.	The impact of R&R	33	Internat. 2008 GM Strat.
3.6.2.5.	Comment on IDMS	34	Internat. 2008 GM Strat.
3.6.3.	Certified DSPs in North America	34	Internat. 2008 GM Strat.
3.6.3.1.	Comment on Certified DSPs	34	Internat. 2008 GM Strat.
3.6.4.	Saturn	36	Internat. 2008 GM Strat.
3.6.4.1.	History of Saturn's DMS (very short version)	36	Internat. 2008 GM Strat.
3.6.4.2.	Saturn in Canada	37	Internat. 2008 GM Strat.
3.6.5.	Endorsed DSPs in Europe	38	Internat. 2008 GM Strat.
3.6.5.1.	DMS	38	Internat. 2008 GM Strat.
3.6.5.2.	National selections	38	Internat. 2008 GM Strat.
	Figure 3.5. A reminder about Europe	39	Internat. 2008 GM Strat.
3.6.5.3.	Later developments in Europe	40	Internat. 2008 GM Strat.
3.6.5.4.	Which is the right viewpoint?	41	Internat. 2008 GM Strat.
	Figure 3.6. GME's Endorsed DMS Providers by Country	42	Internat. 2008 GM Strat.
3.6.5.5.	Comment on GM's DMS in Europe	42	Internat. 2008 GM Strat.
4	Level 6 - Two "shared-subsidiary" System Providers	44	Internat. 2008 GM Strat.
4.1.	OEConnection	44	Internat. 2008 GM Strat.
4.1.1.	Brief history	44	Internat. 2008 GM Strat.
4.1.2.	Products and Services	44	Internat. 2008 GM Strat.
4.1.3.	CollisionLink	44	Internat. 2008 GM Strat.
4.1.4.	D2DLink - a Parts Locator and more	44	Internat. 2008 GM Strat.
4.1.5.	Additional Functions	45	Internat. 2008 GM Strat.
4.1.6.	DMS Integration	45	Internat. 2008 GM Strat.
4.2.	RouteOne	46	Internat. 2008 GM Strat.
4.2.1.	Brief history	46	Internat. 2008 GM Strat.
4.2.2.	RouteOne in the market	46	Internat. 2008 GM Strat.
4.3.2.	Product range	46	Internat. 2008 GM Strat.
	Figure 3.7. Systems and services accessed via RouteOne's Network	47	Internat. 2008 GM Strat.
4.2.3.1.	Electronic Contracting (eC)	47	Internat. 2008 GM Strat.
4.2.4.	Integration with other systems	47	Internat. 2008 GM Strat.
4.2.2.5.	Comment on RouteOne	48	Internat. 2008 GM Strat.
	Figure 3.8. RouteOne's Integration Partners	48	Internat. 2008 GM Strat.
	Preface	1	Euro 2008 PI CROSS
1	Introduction	2	Euro 2008 PI CROSS
1.1.	Porsche Informatik (POI)	2	Euro 2008 PI CROSS
1.1.1.	POI is part of VW AG's current DMS strategy	2	Euro 2008 PI CROSS
	Figure 1.2. Porsche Holding GmbH - business overview	3	Euro 2008 PI CROSS
1.2.	Porsche Holding (PH) Dealers	4	Euro 2008 PI CROSS
1.2.1.	Porsche Holding owns another Importer...	4	Euro 2008 PI CROSS
1.2.2.	Comment on PH Multi-Brand Dealers	4	Euro 2008 PI CROSS
1.3.	This Analysis	5	Euro 2008 PI CROSS
2	The Organisation and its Products	6	Euro 2008 PI CROSS
2.1.	Background to POI	6	Euro 2008 PI CROSS
2.1.1.	International operations	6	Euro 2008 PI CROSS
2.1.2.	Customers	6	Euro 2008 PI CROSS
2.1.2.1.	Dealer & Service Partner numbers	6	Euro 2008 PI CROSS
	Figure 2.1. Porsche Informatik (POI) - Operations by Country	7	Euro 2008 PI CROSS
2.1.2.2.	Numbers of Licences	7	Euro 2008 PI CROSS
2.1.3.	Comment on revenue and profitability	7	Euro 2008 PI CROSS
2.2.	POI Products and Services	8	Euro 2008 PI CROSS
2.2.1.	Overview of a wide range	8	Euro 2008 PI CROSS
2.2.2.	The range - in summary	8	Euro 2008 PI CROSS
	Figure 2.2. Porsche Informatik - Product Range - in outline	9	Euro 2008 PI CROSS

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
2.3.	CROSS 2 DMS in more detail	10	Euro 2008 PI CROSS
2.3.1.	A brief history of CROSS	10	Euro 2008 PI CROSS
2.3.1.1.	System structure - the original CROSS	11	Euro 2008 PI CROSS
2.3.2.	System structure - CROSS 2	11	Euro 2008 PI CROSS
2.3.2.1.	Finance & Accounting	11	Euro 2008 PI CROSS
2.3.3.	Extended Functions	12	Euro 2008 PI CROSS
	Figure 2.3. Porsche Informatik - CROSS 2 and VU2	12	Euro 2008 PI CROSS
2.3.3.1.	Reporting functions	13	Euro 2008 PI CROSS
2.3.3.2.	Planned additional functions	13	Euro 2008 PI CROSS
2.3.3.3.	Developments for VW Group Italia	13	Euro 2008 PI CROSS
2.3.3.4.	Integration with other Systems	14	Euro 2008 PI CROSS
2.3.4.	Comment on CROSS 2	14	Euro 2008 PI CROSS
2.4.	VU2 - Sales Workstation	14	Euro 2008 PI CROSS
2.5.	Visit to a Porsche Holding PIA Dealer	15	Euro 2008 PI CROSS
2.5.1.	The business	15	Euro 2008 PI CROSS
	Figure 2.4. Porsche Salzburg	15	Euro 2008 PI CROSS
2.5.2.	Use of CROSS 2	16	Euro 2008 PI CROSS
2.5.3.	Note on the Salzburg Sales environment	16	Euro 2008 PI CROSS
2.5.4.	Comment on the visit	17	Euro 2008 PI CROSS
2.6.	Conclusions and comments on POI	17	Euro 2008 PI CROSS
2.6.1.	The situation to-date	17	Euro 2008 PI CROSS
2.6.2.	Unpredictable factors	17	Euro 2008 PI CROSS
2.6.3.	Capabilities	18	Euro 2008 PI CROSS
2.6.4.	Two key projects	18	Euro 2008 PI CROSS
2.6.5.	The future?	19	Euro 2008 PI CROSS
3	VW Group Italia, T-Systems and CROSS	20	Euro 2008 PI CROSS
3.1.	The business and its environment	21	Euro 2008 PI CROSS
3.1.1.	OEM Network management in Italy	21	Euro 2008 PI CROSS
3.1.2.	Increase in multi-Brand Dealers under the BER	21	Euro 2008 PI CROSS
3.1.3.	Impact on DMS	21	Euro 2008 PI CROSS
3.1.4.	VGI's Networks	22	Euro 2008 PI CROSS
3.1.5.	Dealer Sizes	22	Euro 2008 PI CROSS
3.2.	Brief history of VW's DMS in Italy	22	Euro 2008 PI CROSS
	Figure 3.1. VW Group Italia - main statistics	22	Euro 2008 PI CROSS
3.3.	The NSIO replacement Project - overview	22	Euro 2008 PI CROSS
3.3.1.	The Project in more detail	22	Euro 2008 PI CROSS
3.4.	CROSS 2	22	Euro 2008 PI CROSS
3.4.1.	One core product	24	Euro 2008 PI CROSS
3.4.2.	Accounting	24	Euro 2008 PI CROSS
3.4.3.	Other adaptations for Italy	24	Euro 2008 PI CROSS
3.4.3.1.	Conversion from NSIO	24	Euro 2008 PI CROSS
	Figure 3.2. NSIO and CROSS 2 structures	24	Euro 2008 PI CROSS
3.4.3.2.	A note on CROSS 2 CRM	25	Euro 2008 PI CROSS
3.4.4.	System capacity	25	Euro 2008 PI CROSS
3.4.4.1.	Expected number of Users	25	Euro 2008 PI CROSS
3.4.5.	DMS Integration with VGI	25	Euro 2008 PI CROSS
3.4.5.1.	Integration with other systems	25	Euro 2008 PI CROSS
	Figure 3.3. Partners in the Project	25	Euro 2008 PI CROSS
3.5.	Organisation of the Project	26	Euro 2008 PI CROSS
3.5.1.	VGI - IT Organisation	26	Euro 2008 PI CROSS
3.5.2.	The role of T-Systems	26	Euro 2008 PI CROSS
3.5.2.1.	T-Systems - Support Services	26	Euro 2008 PI CROSS
3.5.2.2.	T-Systems - Support Team	27	Euro 2008 PI CROSS
3.6.	Visit to a Customer	27	Euro 2008 PI CROSS
3.6.1.	The Service Partner	27	Euro 2008 PI CROSS
3.6.2.	Vanni's Systems	28	Euro 2008 PI CROSS
3.6.2.1.	Brief History	28	Euro 2008 PI CROSS
3.6.2.2.	Installed Software	28	Euro 2008 PI CROSS
	Figure 3.4. Vanni s.r.l. - Service Partner for VW and Audi - located in Mozzecane	28	Euro 2008 PI CROSS
3.6.3.	Service Operations	29	Euro 2008 PI CROSS
3.6.4.	User opinions	29	Euro 2008 PI CROSS
3.6.4.1.	Costs and justifications	29	Euro 2008 PI CROSS
3.6.4.2.	Advantages gained	29	Euro 2008 PI CROSS
3.6.5.	Comment on the visit to Vanni	29	Euro 2008 PI CROSS
3.7.	Conclusions on the VGI project	30	Euro 2008 PI CROSS
3.8.	Porsche Holding Dealers in Italy	30	Euro 2008 PI CROSS
	Appendix 1. VW's Dealer Systems Strategy - an overview	31	Euro 2008 PI CROSS
A1.1.	The current Strategy	31	Euro 2008 PI CROSS
A1.2.	Results of VW's DMS strategy to-date	31	Euro 2008 PI CROSS
A1.2.1.	North America - USA and Canada	31	Euro 2008 PI CROSS
A1.2.2.	Germany	31	Euro 2008 PI CROSS
A1.2.3.	France	32	Euro 2008 PI CROSS

Section	Section Heading	Page	Document short title
A1.2.4.	Italy	32	Euro 2008 PI CROSS
A1.2.5.	The UK	32	Euro 2008 PI CROSS
A1.2.6.	Spain	32	Euro 2008 PI CROSS
A1.2.7.	Switzerland	32	Euro 2008 PI CROSS
A1.2.8.	Belgium and The Netherlands	32	Euro 2008 PI CROSS
A1.2.8.	Austria and much of Central Europe	32	Euro 2008 PI CROSS
A1.2.8.	Middle East and Far East	32	Euro 2008 PI CROSS
A1.3.	Comment on VW's strategy	32	Euro 2008 PI CROSS
A1.3.1.	Conclusion	33	Euro 2008 PI CROSS
	Glossary of Names & Acronyms appearing in this Analysis	34	Euro 2008 PI CROSS
	Preface	1	Internat. 2008 Sales
1	Overview	2	Internat. 2008 Sales
1.1.	Sales and Service - very different market structures	2	Internat. 2008 Sales
1.2.	New Vehicles	2	Internat. 2008 Sales
1.3.	Used Vehicles	2	Internat. 2008 Sales
1.4.	The vehicle is only part of "the deal"	3	Internat. 2008 Sales
1.5.	International common factors and differences	3	Internat. 2008 Sales
1.6.	Categories of systems covered	4	Internat. 2008 Sales
	Figure 1.1. Participants in New Vehicle Distribution and Sales	6	Internat. 2008 Sales
	Figure 1.2. Participants in Used Vehicle Distribution and Sales	8	Internat. 2008 Sales
2	Legislation's influence on Sales Processes	10	Internat. 2008 Sales
2.1.	A complex, risky environment	10	Internat. 2008 Sales
2.2.	Main areas of legislation	10	Internat. 2008 Sales
2.3.	Implications for Dealer Processes	11	Internat. 2008 Sales
2.4.	"Solutions for everything"	11	Internat. 2008 Sales
	Figure 2.1. Systems which help Dealers to be "compliant"	11	Internat. 2008 Sales
2.5.	Why is the USA more active?	12	Internat. 2008 Sales
2.6.	Non-compliance can be expensive	12	Internat. 2008 Sales
3	OEM involvement in Vehicle Sales Processes	13	Internat. 2008 Sales
3.1.	Two Parties usually involved	13	Internat. 2008 Sales
3.2.	OEM policies - an overview	13	Internat. 2008 Sales
3.2.1.	The USA	13	Internat. 2008 Sales
3.2.2.	Canada	13	Internat. 2008 Sales
3.2.3.	Europe	13	Internat. 2008 Sales
3.2.3.1.	Reasons for the differences	14	Internat. 2008 Sales
3.3.	OEM "exclusive" interests	14	Internat. 2008 Sales
3.4.	F&I	14	Internat. 2008 Sales
3.4.1.	Canada and the USA	14	Internat. 2008 Sales
3.4.2.	Europe	15	Internat. 2008 Sales
3.5.	Direction of developments	15	Internat. 2008 Sales
3.5.1.	The USA and Canada	15	Internat. 2008 Sales
3.5.2.	Europe	16	Internat. 2008 Sales
3.6.	OEM direct sales	16	Internat. 2008 Sales
4	Dealers' Sales Processes - The Dealer Environment	17	Internat. 2008 Sales
	Figure 4.1. Influences on Dealers' Sales Processes	18	Internat. 2008 Sales
4.1.	The Sales Process, Technology and Legislation - One viewpoint	19	Internat. 2008 Sales
4.2.	No standard situation	19	Internat. 2008 Sales
4.2.1.	Prospects & Customers	19	Internat. 2008 Sales
4.2.1.1.	Effect of Brand differences	20	Internat. 2008 Sales
4.2.2.	The many ways of initial contact	20	Internat. 2008 Sales
4.3.	Sales Processes	20	Internat. 2008 Sales
4.3.1.	The "greeting" stage	20	Internat. 2008 Sales
4.3.2.	The "qualification" stage	21	Internat. 2008 Sales
4.3.3.	"Trade-in appraisal" stage	21	Internat. 2008 Sales
4.3.4.	"Selling the vehicle" stage	22	Internat. 2008 Sales
4.3.5.	The "Desking" stage	22	Internat. 2008 Sales
4.3.6.	The "F&I" stage	22	Internat. 2008 Sales
4.3.6.1.	Compliance	23	Internat. 2008 Sales
4.3.6.2.	"Menus" for Insurance	23	Internat. 2008 Sales
4.3.7.	The "Accessories" stage	23	Internat. 2008 Sales
4.4.	Comments on Sales Processes	23	Internat. 2008 Sales
4.4.1.	Customer views v Dealer objectives	23	Internat. 2008 Sales
4.4.2.	The "automated" sale	24	Internat. 2008 Sales
4.4.3.	The "sales people problem"	24	Internat. 2008 Sales
5	Infrastructure Providers - primarily for F&I	25	Internat. 2008 Sales
5.1.	The main differences between Europe and North America	25	Internat. 2008 Sales
5.1.1.	Access to Credit Bureaux	25	Internat. 2008 Sales
5.1.2.	Open F&I Networks	26	Internat. 2008 Sales
5.1.2.1.	Comment on European attitudes	26	Internat. 2008 Sales
5.1.2.2.	Not 100% adoption of FANs	26	Internat. 2008 Sales
5.1.3.	Similarities	26	Internat. 2008 Sales
5.2.	The main Infrastructure Providers	27	Internat. 2008 Sales

Section	Section Heading	Page	Document short title
	Figure 5.1. North American Infrastructures supporting F&I Sales	28	Internat. 2008 Sales
5.2.1.	Some important differences	29	Internat. 2008 Sales
5.2.1.1.	Commercial basis	29	Internat. 2008 Sales
5.2.1.2.	Dependence on co-operation	29	Internat. 2008 Sales
5.2.3.	Supplementary infrastructures	30	Internat. 2008 Sales
5.3.	DealerTrack (DT)	31	Internat. 2008 Sales
5.3.1.	Operating in Canada and the USA	31	Internat. 2008 Sales
5.3.2.	DT's range of systems for Sales	31	Internat. 2008 Sales
5.3.3.	Infrastructure services	31	Internat. 2008 Sales
5.3.3.1.	Current business levels	31	Internat. 2008 Sales
	Figure 5.2. DealerTrack's complex of systems, services and Partner links - USA	32	Internat. 2008 Sales
5.3.3.2.	Customer mix	33	Internat. 2008 Sales
5.3.4.	eContracting	33	Internat. 2008 Sales
5.3.4.1.	Global Fax	34	Internat. 2008 Sales
5.3.5.	Other services via the FAN	34	Internat. 2008 Sales
5.3.6.	Open integration policy	34	Internat. 2008 Sales
5.3.7.	Comment on DT	34	Internat. 2008 Sales
5.3.8.	Legal Action	34	Internat. 2008 Sales
5.4.	Finance Express (FEX)	35	Internat. 2008 Sales
5.4.1.	Specialising in the Independent Used Vehicle Dealer market	35	Internat. 2008 Sales
5.4.2.	Background	35	Internat. 2008 Sales
5.4.2.1.	Compusolutions Inc.	35	Internat. 2008 Sales
5.4.2.2.	Tracker DMS	35	Internat. 2008 Sales
5.4.2.3.	Another important Partnership	35	Internat. 2008 Sales
5.4.3.	Product range	36	Internat. 2008 Sales
5.4.3.1.	Escrow Services	36	Internat. 2008 Sales
5.4.3.2.	Direct Lending Program	36	Internat. 2008 Sales
5.4.3.3.	Call Centre Services	36	Internat. 2008 Sales
5.4.4.	Other Partnerships	36	Internat. 2008 Sales
5.4.4.1.	RouteOne	36	Internat. 2008 Sales
5.4.4.2.	ADP Dealer Services	36	Internat. 2008 Sales
5.4.5.	Business levels	37	Internat. 2008 Sales
5.4.6.	Comment	37	Internat. 2008 Sales
5.5.	RouteOne (R1)	38	Internat. 2008 Sales
5.5.1.	Operating in Canada and the USA	38	Internat. 2008 Sales
5.5.2.	Business structure	38	Internat. 2008 Sales
5.5.3.	Customer base	38	Internat. 2008 Sales
5.5.3.1.	Captive finance sources	38	Internat. 2008 Sales
5.5.3.2.	Independent finance sources	38	Internat. 2008 Sales
5.5.4.	Partnerships, not acquisitions	39	Internat. 2008 Sales
5.5.5.	Products and services	39	Internat. 2008 Sales
	Figure 5.3. The various DSPs who are integrated with RouteOne's FAN	39	Internat. 2008 Sales
5.5.5.1.	Brand-specific functions	40	Internat. 2008 Sales
5.5.5.2.	Additional functions	40	Internat. 2008 Sales
5.5.6.	Electronic Contracting (eC)	40	Internat. 2008 Sales
5.5.7.	Comment on RouteOne	41	Internat. 2008 Sales
5.6.	afb	42	Internat. 2008 Sales
5.6.1.	Operating in 4 Countries in Europe	42	Internat. 2008 Sales
5.6.2.	Brief history	43	Internat. 2008 Sales
5.6.3.	Products	43	Internat. 2008 Sales
5.6.3.1.	Flexible approach	43	Internat. 2008 Sales
5.6.3.3.	Application Modules - overview	43	Internat. 2008 Sales
	Figure 5.6.1. afb Systems Structure - in outline	44	Internat. 2008 Sales
	Figure 5.6.2. Credit Management Solution - Business Areas and Channels	45	Internat. 2008 Sales
5.6.3.4.	Point-of-Sale in more detail	46	Internat. 2008 Sales
5.6.3.5.	Comment on the POS system	46	Internat. 2008 Sales
5.6.3.6.	Technology platform	47	Internat. 2008 Sales
5.6.3.7.	Security Protection	47	Internat. 2008 Sales
	Figure 5.6.3. Credit Management Solution - Technical Architecture	47	Internat. 2008 Sales
5.6.3.8.	Pricing options	48	Internat. 2008 Sales
5.6.4.	Customers	48	Internat. 2008 Sales
5.6.5.	Comment on afb	49	Internat. 2008 Sales
5.6.5.1.	"Two markets"	49	Internat. 2008 Sales
5.7.	Ebbon-Dacs BQD	50	Internat. 2008 Sales
5.7.1.	Operating in the UK	50	Internat. 2008 Sales
5.7.2.	BestQuoteDirect - Overview	50	Internat. 2008 Sales
5.7.3.	Participants in the Network	50	Internat. 2008 Sales
5.7.4.	Operation	50	Internat. 2008 Sales
5.7.5.	Comment on BQD	50	Internat. 2008 Sales
5.8.	Frontline Solutions Ltd. (FSL)	51	Internat. 2008 Sales
5.8.1.	Operating in the UK	51	Internat. 2008 Sales
5.8.2.	Overview	51	Internat. 2008 Sales

Section	Section Heading	Page	Document short title
5.8.2.1.	DealTrak for Brokers	51	Internat. 2008 Sales
5.8.2.2.	DealTrak1-2-3 for Dealers	52	Internat. 2008 Sales
5.8.3.	Comment on FSL	52	Internat. 2008 Sales
5.9.	White Clarke Group (WCG)	53	Internat. 2008 Sales
5.9.1.	UK based with international operations	53	Internat. 2008 Sales
5.9.1.2.	A brief history	54	Internat. 2008 Sales
5.9.2.	Business areas	54	Internat. 2008 Sales
5.9.3.	Automotive Finance Systems	54	Internat. 2008 Sales
	Figure 5.9.1. Customers with which White Clarke Group has worked	54	Internat. 2008 Sales
	Figure 5.9.2. WCG Systems for Automotive Finance	55	Internat. 2008 Sales
5.9.3.1.	A configurable product-line	56	Internat. 2008 Sales
5.9.4.	Front Office Application (POS)	56	Internat. 2008 Sales
5.9.4.1.	Customers	56	Internat. 2008 Sales
5.9.4.2.	CALMS POS application	56	Internat. 2008 Sales
5.9.4.3.	Dealer systems integration	56	Internat. 2008 Sales
5.9.4.4.	Other Front Office applications	56	Internat. 2008 Sales
5.9.4.5.	Supporting Services	57	Internat. 2008 Sales
5.9.5.	CALMS Middle & Back Office	57	Internat. 2008 Sales
5.9.5.1.	Different from North America	57	Internat. 2008 Sales
	Figure 5.8.3. WGC Supporting Services	57	Internat. 2008 Sales
5.9.6.	Other Products	58	Internat. 2008 Sales
5.9.6.1.	The EuroLease system	58	Internat. 2008 Sales
5.9.6.2.	The Southpac system - Australia	58	Internat. 2008 Sales
5.9.7.	Comment on WCG	58	Internat. 2008 Sales
6	Point-of-Sale Systems	59	Internat. 2008 Sales
6.1.	A view of the DSPs in this category	59	Internat. 2008 Sales
6.1.1.	What about "CRM"?	59	Internat. 2008 Sales
	Figure 6.1. Sales Systems - main application areas	60	Internat. 2008 Sales
6.1.2.	Categorisation	61	Internat. 2008 Sales
6.2.	North America	61	Internat. 2008 Sales
6.2.1.	A continuing battle	61	Internat. 2008 Sales
6.2.2.	"Open" interconnections	61	Internat. 2008 Sales
6.3.	DMS Sales modules - North America	61	Internat. 2008 Sales
	ADP and Reynolds & Reynolds - preliminary comment	62	Internat. 2008 Sales
6.3.1.	ADP Dealer Services (ADP)	62	Internat. 2008 Sales
6.3.1.1.	Applications overview	62	Internat. 2008 Sales
6.3.1.2.	Sales applications	62	Internat. 2008 Sales
6.3.1.3.	Comment on ADP	63	Internat. 2008 Sales
6.3.2.	Reynolds & Reynolds (R&R)	63	Internat. 2008 Sales
6.3.2.1.	Applications overview	63	Internat. 2008 Sales
6.3.2.2.	Sales applications	63	Internat. 2008 Sales
6.3.2.3.	Comment on R&R	64	Internat. 2008 Sales
6.3.3.	DealerTrack (DT)	64	Internat. 2008 Sales
6.3.3.1.	Applications overview	64	Internat. 2008 Sales
6.3.3.2.	Sales applications	64	Internat. 2008 Sales
6.3.4.	"Smaller" DMS Providers	65	Internat. 2008 Sales
6.3.4.1.	ADAM Systems	65	Internat. 2008 Sales
6.3.4.2.	Auto/Mate	66	Internat. 2008 Sales
6.3.4.3.	Automotive Computer Systems - ACS	66	Internat. 2008 Sales
6.3.4.4.	Autosoft International (ASI)	66	Internat. 2008 Sales
6.3.4.5.	DPC Systems	66	Internat. 2008 Sales
6.3.4.6.	Dealer Information Systems (DIS)	66	Internat. 2008 Sales
6.3.4.7.	Dubuque Data Services (DDS)	66	Internat. 2008 Sales
6.3.4.8.	MPK Automotive	66	Internat. 2008 Sales
6.3.4.9.	PBS Systems	66	Internat. 2008 Sales
6.3.4.10.	Quorum	66	Internat. 2008 Sales
6.3.4.11.	More DMS Providers	67	Internat. 2008 Sales
6.3.5.	Specialist DSPs - North America	67	Internat. 2008 Sales
6.3.5.1.	Categories covered	67	Internat. 2008 Sales
6.3.5.2.	No standards...	67	Internat. 2008 Sales
6.3.5.3.	Newcomers and acquisitions	67	Internat. 2008 Sales
6.3.5.4.	Not easy for most Specialists	67	Internat. 2008 Sales
	Figure 6.2. Web addresses - North American Sales-related Systems reviewed	68	Internat. 2008 Sales
6.3.6.	Individual Specialist DSPs	69	Internat. 2008 Sales
6.3.6.1.	Advent Resources	69	Internat. 2008 Sales
6.3.6.2.	Autobase	69	Internat. 2008 Sales
6.3.6.3.	Automotive Computer Technology - ACT	69	Internat. 2008 Sales
6.3.6.4.	Coindata	70	Internat. 2008 Sales
6.3.6.5.	Data Consultants	70	Internat. 2008 Sales
6.3.6.6.	Dealerware - F&I Menu Wizard	70	Internat. 2008 Sales
6.3.6.7.	Dealer Marketing Services - Promax	71	Internat. 2008 Sales
6.3.6.8.	Dynisis Information Services - DADS	71	Internat. 2008 Sales

Section	Section Heading	Page	Document short title
6.3.6.9.	Fresh Beginnings - elead	71	Internat. 2008 Sales
6.3.6.10.	Finance Profit Center ... now... Priority 1 Software	71	Internat. 2008 Sales
6.3.6.11.	Higher Gear Group	71	Internat. 2008 Sales
6.3.6.12.	JMsolutions	71	Internat. 2008 Sales
6.3.6.13.	imagiclab - 5Square	72	Internat. 2008 Sales
6.3.6.14.	IzmoCars - Reckon Up	72	Internat. 2008 Sales
6.3.6.15.	MarketScan	72	Internat. 2008 Sales
6.3.6.16.	Maxim Automotive	72	Internat. 2008 Sales
6.3.6.17.	MenuVantage	72	Internat. 2008 Sales
6.3.6.18.	Snap-on	73	Internat. 2008 Sales
6.3.6.19.	Strategic Connections Inc. - Torque	73	Internat. 2008 Sales
6.3.6.20.	Vehicle Databases	73	Internat. 2008 Sales
6.3.7.	Other Specialists	74	Internat. 2008 Sales
6.3.8.	Multiple Systems used together	74	Internat. 2008 Sales
	Figure 6.3. Other Providers with Sales-related Functions - not reviewed here	74	Internat. 2008 Sales
6.4.	Europe	75	Internat. 2008 Sales
6.4.1.	A very different situation	75	Internat. 2008 Sales
6.4.2.	No "Open" interconnections	75	Internat. 2008 Sales
6.4.3.	DSP reviews	75	Internat. 2008 Sales
6.5.	DMS Sales modules - Europe	75	Internat. 2008 Sales
6.5.1.	ADP	76	Internat. 2008 Sales
6.5.2.	ASC - based in Germany	76	Internat. 2008 Sales
6.5.3.	Audev - based in the Netherlands	76	Internat. 2008 Sales
6.5.4.	Automaster - based in Finland	76	Internat. 2008 Sales
6.5.5.	Datafirst - based in France	77	Internat. 2008 Sales
6.5.6.	Ebbon-Dacs - based in the UK	77	Internat. 2008 Sales
6.5.7.	EDS-MmS (Germany)	77	Internat. 2008 Sales
6.5.8.	Esseitalia (Italy)	77	Internat. 2008 Sales
6.5.9.	Freicon - based in Germany	78	Internat. 2008 Sales
6.5.10.	incadea - based in Austria	78	Internat. 2008 Sales
6.5.11.	Pinewood (UK)	78	Internat. 2008 Sales
6.5.12.	Reynolds - Europe	78	Internat. 2008 Sales
6.5.13.	Sage-Cogestib - based in France	78	Internat. 2008 Sales
6.5.14.	T-Systems - Europe	79	Internat. 2008 Sales
6.5.15.	Vector - based in Austria	79	Internat. 2008 Sales
6.5.16.	Visual Software (Italy)	79	Internat. 2008 Sales
6.5.17.	Other notable DMS providers	79	Internat. 2008 Sales
	Figure 6.4. Web addresses - European Sales-related Systems reviewed	80	Internat. 2008 Sales
6.5.17.1.	Large ERP-based DMS	81	Internat. 2008 Sales
6.5.17.2.	Significant National DSPs not covered so far	81	Internat. 2008 Sales
6.5.17.3.	DSPs selling to "small Dealers"	81	Internat. 2008 Sales
6.5.17.4.	Importers with their own DMS	81	Internat. 2008 Sales
6.5.17.5.	Dealers with their own Systems	82	Internat. 2008 Sales
6.6.	Specialist Sales Systems - Europe	82	Internat. 2008 Sales
6.6.1.	Individual Specialists with Sales Systems	83	Internat. 2008 Sales
6.6.1.1.	Carano (Germany)	83	Internat. 2008 Sales
6.6.1.2.	Carmeile/exa-logic (Germany)	83	Internat. 2008 Sales
6.6.1.3.	Contact Advantage - CA (UK)	83	Internat. 2008 Sales
6.6.1.4.	EasyCar - SEG (Germany)	83	Internat. 2008 Sales
6.6.1.5.	Eight Technology (UK)	83	Internat. 2008 Sales
6.6.1.6.	Fastrack (UK)	83	Internat. 2008 Sales
6.6.1.7.	fmade (Austria)	83	Internat. 2008 Sales
6.6.1.8.	Martec - Mentor (UK)	84	Internat. 2008 Sales
6.6.1.9.	q-bit Systems (UK)	84	Internat. 2008 Sales
6.6.1.10.	Quarum - Loyalty Logistix (UK)	84	Internat. 2008 Sales
6.6.1.11.	Quattroruote (Italy)	84	Internat. 2008 Sales
6.6.1.12.	RPMcar - Paradigit (NL)	84	Internat. 2008 Sales
6.6.1.13.	Select Up (France)	84	Internat. 2008 Sales
6.6.2.	Large Organisations with other interests	85	Internat. 2008 Sales
6.6.2.1.	DMRI (UK)	85	Internat. 2008 Sales
6.6.2.2.	Manheim (UK)	85	Internat. 2008 Sales
6.6.2.3.	Trader Media Group (UK)	85	Internat. 2008 Sales
6.6.3.	Providers of Sales-related Databases	86	Internat. 2008 Sales
6.6.3.1.	CAP (UK)	86	Internat. 2008 Sales
6.6.3.2.	DAT (Germany)	86	Internat. 2008 Sales
6.6.3.3.	EurotaxGlass's (European)	86	Internat. 2008 Sales
6.6.3.4.	Jato (UK)	86	Internat. 2008 Sales
6.6.3.5.	L'argus and Planet VO (France)	87	Internat. 2008 Sales
6.6.3.6.	ROADTODATA - Polk (UK)	87	Internat. 2008 Sales
6.7.	Sales Systems in other Regions	87	Internat. 2008 Sales
6.7.1.	Auto-IT (Australia)	87	Internat. 2008 Sales
6.7.2.	Autologica (Argentina)	87	Internat. 2008 Sales

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
6.7.3.	Auto-Mate (South Africa)	87	Internat. 2008 Sales
6.7.4.	Pentana Solutions (Australia)	87	Internat. 2008 Sales
	Appendix 1 - F&I Business in the UK	88	Internat. 2008 Sales
A1.1.	Introduction	88	Internat. 2008 Sales
A1.2.	Role of Finance & Leasing	88	Internat. 2008 Sales
A1.2.1.	OEMs also under pressure	88	Internat. 2008 Sales
A1.3.	Product range	89	Internat. 2008 Sales
A1.3.1.	Consumer protection	89	Internat. 2008 Sales
A1.3.1.1.	UK legislation	89	Internat. 2008 Sales
A1.3.1.2.	Licensing and regulation	89	Internat. 2008 Sales
A1.3.1.3.	Impact on systems	90	Internat. 2008 Sales
A1.4.	Sources of Consumer Finance	90	Internat. 2008 Sales
A1.4.1.	Direct Lending Sources	90	Internat. 2008 Sales
A1.4.2.	Advertisers, Introducers and Brokers	91	Internat. 2008 Sales
A1.4.3.	Dealer Finance Sources	91	Internat. 2008 Sales
A1.4.4.	Influence of Captives & OEMs	91	Internat. 2008 Sales
A1.5.	Independent Finance Sources	92	Internat. 2008 Sales
A1.5.1.	The difference...	92	Internat. 2008 Sales
A1.6.	Finance Related Systems in the UK	92	Internat. 2008 Sales
A1.6.1.	System evolution	92	Internat. 2008 Sales
A1.6.2.	No sharing	93	Internat. 2008 Sales
A1.6.3.	Role of the DMS	93	Internat. 2008 Sales
A1.6.3.1.	A few SWS projects	93	Internat. 2008 Sales
A1.6.4.	Specialist DSPs in the showroom	94	Internat. 2008 Sales
A1.6.5.	Integration	94	Internat. 2008 Sales
A1.6.6.	Dealer Groups	94	Internat. 2008 Sales
A1.6.7.	Captive Finance Company Systems	94	Internat. 2008 Sales
A1.6.7.1.	Ford Financial Britain (FFB)	95	Internat. 2008 Sales
A1.6.7.2.	GMAC	96	Internat. 2008 Sales
A1.6.7.3.	Development Direction	96	Internat. 2008 Sales
A1.6.8.	Independent Finance Company Systems	96	Internat. 2008 Sales
A1.6.8.1.	Bank of Scotland Dealer Finance	97	Internat. 2008 Sales
A1.6.8.2.	Black Horse Motor Finance	97	Internat. 2008 Sales
A1.6.8.3.	GE Money Motor Finance	97	Internat. 2008 Sales
A1.6.8.4.	Santander	97	Internat. 2008 Sales
A1.6.9.	Specialist multi-lender networks	97	Internat. 2008 Sales
A1.6.9.1.	Credit Aggregation	97	Internat. 2008 Sales
A1.6.9.2.	An unhelpful environment	98	Internat. 2008 Sales
A1.6.9.3.	Credit Reference Agencies	98	Internat. 2008 Sales
A1.6.10.	Warranty & Insurance Providers and their Systems	98	Internat. 2008 Sales
A1.6.10.1.	Mapfre Abraxas	98	Internat. 2008 Sales
A1.6.10.2.	GMAC Insurance	99	Internat. 2008 Sales
A1.6.10.3.	The Warranty Group	99	Internat. 2008 Sales
A1.6.10.4.	AutoProtect	99	Internat. 2008 Sales
A1.6.11.	Comment on the current market	99	Internat. 2008 Sales
	Glossary of terms	100	Internat. 2008 Sales
	Preface	1	Internat. 2009 MB Global
Part 1 - Introduction		2	Internat. 2009 MB Global
1	High-level strategy	2	Internat. 2009 MB Global
1.1.	MB's vision	2	Internat. 2009 MB Global
1.2.	Our view of the original objectives	2	Internat. 2009 MB Global
1.3.	MB's Networks	3	Internat. 2009 MB Global
2	A Single, Standard DMS	3	Internat. 2009 MB Global
2.1.	North America	3	Internat. 2009 MB Global
2.2.	Timing - implications for Europe	4	Internat. 2009 MB Global
2.3.	EU Expansion	4	Internat. 2009 MB Global
2.4.	Other special situations	4	Internat. 2009 MB Global
	ADP acquires Automaster	5	Internat. 2009 MB Global
3	International Standardisation Project	7	Internat. 2009 MB Global
3.1.	Blueprint Autoline	7	Internat. 2009 MB Global
3.1.1.	Part of the standard Autoline	7	Internat. 2009 MB Global
3.1.2.	A massive task (See also Figure 1.)	7	Internat. 2009 MB Global
	Figure 1. Mercedes-Benz Global Partnership with ADP and Blueprint Autoline	8	Internat. 2009 MB Global
3.1.3.	NSIP - National Standard Implementation Pack	9	Internat. 2009 MB Global
3.2.	Country or Regional Support	9	Internat. 2009 MB Global
3.2.1.	ADP's Teams	9	Internat. 2009 MB Global
3.2.2.	MB's Teams	9	Internat. 2009 MB Global
3.2.3.	Levels of Blueprint	10	Internat. 2009 MB Global
3.3.	Progress to-date	10	Internat. 2009 MB Global
3.3.1.	Overview	10	Internat. 2009 MB Global
3.3.2.	Measuring progress	10	Internat. 2009 MB Global
3.3.2.1.	Asia-Pacific region	11	Internat. 2009 MB Global

<b>Section</b>	<b>Section Heading</b>	<b>Page</b>	<b>Document short title</b>
3.3.2.2.	Western Europe and Turkey	11	Internat. 2009 MB Global
3.3.2.3.	Other Regions - except North America	12	Internat. 2009 MB Global
3.3.2.4.	North America	12	Internat. 2009 MB Global
3.3.4.	Comment on Blueprint progress	13	Internat. 2009 MB Global
	Figure 2. Mercedes-Benz Global Dealer Systems implementations - Overview	13	Internat. 2009 MB Global
3.4.	Standard Processes Strategy	14	Internat. 2009 MB Global
3.4.1.	Content of the Standard Processes	14	Internat. 2009 MB Global
3.4.2.	Process Consultancy & Training	14	Internat. 2009 MB Global
3.5.	MB's Applications & Integrations	15	Internat. 2009 MB Global
	Figure 3. Mercedes-Benz Applications surrounding the DMS - in outline	16	Internat. 2009 MB Global
3.5.1.	A continuing process	17	Internat. 2009 MB Global
3.5.2.	MB Finance	17	Internat. 2009 MB Global
3.6.	Conclusions	17	Internat. 2009 MB Global
	Part 2: Mercedes-Benz Dealer Systems - USA and Canada	18	Internat. 2009 MB Global
1	The USA	18	Internat. 2009 MB Global
1.1.	Dealer Network	18	Internat. 2009 MB Global
1.2.	DMS in the Network	19	Internat. 2009 MB Global
1.3.	Other systems in the Network	19	Internat. 2009 MB Global
1.4.	Future possibilities for Autoline	19	Internat. 2009 MB Global
1.5.	Reasons for wanting a single DMS	20	Internat. 2009 MB Global
1.5.1.	A situation under review	20	Internat. 2009 MB Global
1.6.	Conclusions on the USA	21	Internat. 2009 MB Global
2	Canada	21	Internat. 2009 MB Global
2.1.	Dealer Network	21	Internat. 2009 MB Global
2.2.	DMS in the Network	21	Internat. 2009 MB Global
2.3.	Other systems in the Network	21	Internat. 2009 MB Global
2.4.	Future possibilities for Autoline	21	Internat. 2009 MB Global
2.5.	Conclusions on Canada	22	Internat. 2009 MB Global
3	Closing comment	22	Internat. 2009 MB Global
Part 3.	Mercedes-Benz - ADP Autoline Blueprint in operation in the UK		Internat. 2009 MB Global
	Drayton Group - overview	23	Internat. 2009 MB Global
1	Background to the Group	23	Internat. 2009 MB Global
1.1.	Brief history	24	Internat. 2009 MB Global
1.2.	A frequent pilot	24	Internat. 2009 MB Global
1.3.	Blueprint in outline	24	Internat. 2009 MB Global
1.3.1.	NSIP - National Standard Implementation Pack	24	Internat. 2009 MB Global
2	Systems currently used in the Group	24	Internat. 2009 MB Global
	Figure 1. Drayton Group Systems	25	Internat. 2009 MB Global
2.1.	Blueprint Autoline upgrade process	26	Internat. 2009 MB Global
3	Organisation structure	26	Internat. 2009 MB Global
3.1.	Human Resources	27	Internat. 2009 MB Global
4	Departmental operations	27	Internat. 2009 MB Global
4.1.	Sales Department	27	Internat. 2009 MB Global
4.1.1.	Local contact activity	27	Internat. 2009 MB Global
4.1.2.	Call Centre & Internet	27	Internat. 2009 MB Global
4.1.3.	Sales Administration	28	Internat. 2009 MB Global
4.1.3.1.	MB's New Vehicle System	28	Internat. 2009 MB Global
4.1.3.2.	MB's Vehicle Information	28	Internat. 2009 MB Global
4.1.3.3.	Customer data - changing needs	28	Internat. 2009 MB Global
4.2.	Service Department	28	Internat. 2009 MB Global
4.2.1.	MB's Processes	28	Internat. 2009 MB Global
4.2.2.	Warranty process - EVAadvanced	29	Internat. 2009 MB Global
4.2.3.	New developments in pilot use	29	Internat. 2009 MB Global
4.2.4.	Service "CRM" functions	29	Internat. 2009 MB Global
4.3.	Parts Department	30	Internat. 2009 MB Global
4.4.	Accounting	30	Internat. 2009 MB Global
5	Blueprint's impact on the Drayton Group	30	Internat. 2009 MB Global
Appendix 1:	Showroom systems and "co-operative CRM" for Mercedes-Benz Canada	31	Internat. 2009 MB Global
A1.	Origin of the project (in brief)	31	Internat. 2009 MB Global
A2.	Environment of the project	31	Internat. 2009 MB Global
	Figure A1 System structure	32	Internat. 2009 MB Global
A3.	Systems linked to Napoleon	33	Internat. 2009 MB Global
	Figure A2. Napoleon Sales Process - everything on the one Screen	34	Internat. 2009 MB Global
A4.	Sales Processes	34	Internat. 2009 MB Global
A5.	Selling new vehicles with Napoleon	35	Internat. 2009 MB Global
A6.	Used vehicles and Napoleon	35	Internat. 2009 MB Global
A7.	Customer retention - Sales	35	Internat. 2009 MB Global
A8.	Customer retention - Service	35	Internat. 2009 MB Global
A9.	Dealer training	36	Internat. 2009 MB Global
A10.	Visit to an MB Retail dealer	36	Internat. 2009 MB Global
A11.	Conclusions	37	Internat. 2009 MB Global
A12.	Brief Update - January 2009	37	Internat. 2009 MB Global

Section	Section Heading	Page	Document short title
A12.1.	At the DMS level	37	Internat. 2009 MB Global
A12.2.	At the Showroom level	37	Internat. 2009 MB Global
A12.3.	Conclusions	37	Internat. 2009 MB Global
	The "smaller" DMS Providers - Preface	1	USA 2009 Smaller DMS
	Dominance has been earned...	1	USA 2009 Smaller DMS
	Not totally impregnable...	1	USA 2009 Smaller DMS
	Reviews of individual "smaller" DSPs	2	USA 2009 Smaller DMS
	Asbury Automotive Group Inc. and DealerTrack-Arkona	3	USA 2009 Smaller DMS
	Preface	3	USA 2009 Smaller DMS
	"Make or break"	3	USA 2009 Smaller DMS
Part 1:	DealerTrack's position in North America - Introduction	4	USA 2009 Smaller DMS
1	Corporate Structure	4	USA 2009 Smaller DMS
1.1.	Public ownership and information access	4	USA 2009 Smaller DMS
1.2.	Multiple Companies and Products	4	USA 2009 Smaller DMS
1.3.	A comment on... Acquisitions	5	USA 2009 Smaller DMS
2	Latest financial results	5	USA 2009 Smaller DMS
2.1.	The Announcement process	5	USA 2009 Smaller DMS
	Figure 1. DealerTrack's Financial performance (summary) - 2008	5	USA 2009 Smaller DMS
2.1.1.	The Transactions business	6	USA 2009 Smaller DMS
2.1.1.1.	Looking ahead	6	USA 2009 Smaller DMS
2.1.1.2.	Transaction Pricing	6	USA 2009 Smaller DMS
	Figure 2. DealerTrack's complex of Systems, Services and Partner links - USA	7	USA 2009 Smaller DMS
2.1.2.	The Subscriptions business	8	USA 2009 Smaller DMS
2.1.2.1.	Estimate of Arkona's potential	8	USA 2009 Smaller DMS
2.1.2.2.	Other Subscription products	8	USA 2009 Smaller DMS
2.2.	Final point on "Financials"	9	USA 2009 Smaller DMS
3	DT's strategy	9	USA 2009 Smaller DMS
4	DT's Product-line	10	USA 2009 Smaller DMS
	Figure 3. Product Focus areas	10	USA 2009 Smaller DMS
4.1.	Previous Analyses of DT	10	USA 2009 Smaller DMS
4.2.	Arkona DMS	10	USA 2009 Smaller DMS
4.2.1.	Position in the product-line	10	USA 2009 Smaller DMS
4.2.2.	Latest enhancements	10	USA 2009 Smaller DMS
	CRM	10	USA 2009 Smaller DMS
	OEM Integrations	10	USA 2009 Smaller DMS
	Figure 4. Overview of DealerTrack's Acquisitions & Partners and Product Line	11	USA 2009 Smaller DMS
	Labour Time Guides & Menu Pricing	12	USA 2009 Smaller DMS
	Open interfaces	12	USA 2009 Smaller DMS
	New Graphical User Interface (GUI)	12	USA 2009 Smaller DMS
4.2.3.	Comment on Arkona	12	USA 2009 Smaller DMS
4.3.	Inventory Management (Vehicles)	13	USA 2009 Smaller DMS
	PriceDriver (Level 1)	13	USA 2009 Smaller DMS
	InventoryPro (Level 2)	13	USA 2009 Smaller DMS
	aaX - Vehicle Management System (Level 3)	13	USA 2009 Smaller DMS
4.4.	Sales	13	USA 2009 Smaller DMS
	Vehicle Data	13	USA 2009 Smaller DMS
	Networks	13	USA 2009 Smaller DMS
	Point-of-Sale systems	14	USA 2009 Smaller DMS
	Ancillary systems	14	USA 2009 Smaller DMS
4.5.	Compliance	14	USA 2009 Smaller DMS
	DealWatch	14	USA 2009 Smaller DMS
	ExactID	15	USA 2009 Smaller DMS
	RedFlags	15	USA 2009 Smaller DMS
5	Co-operation with Partners	15	USA 2009 Smaller DMS
6	Comments and conclusions	15	USA 2009 Smaller DMS
6.1.	Last-minute note: One effect of DealerTrack's acquisition of aaXchange	16	USA 2009 Smaller DMS
Part 2:	Asbury Automotive Group Inc. DealerTrack-Arkona - Introduction	17	USA 2009 Smaller DMS
	Asbury Automotive Group Inc. in the USA	17	USA 2009 Smaller DMS
1	Organization	18	USA 2009 Smaller DMS
1.1.	Organizational changes	18	USA 2009 Smaller DMS
	Figure 1. From Asbury's 2007 Annual Report	18	USA 2009 Smaller DMS
1.2.	Dealer Systems before DT-Arkona	19	USA 2009 Smaller DMS
2	Agreement with DT-Arkona	19	USA 2009 Smaller DMS
	Figure 2. Asbury's 2007 Annual Report - Management Information Systems	19	USA 2009 Smaller DMS
2.1.	Why Arkona?	20	USA 2009 Smaller DMS
2.2.	Expected Cost Savings	20	USA 2009 Smaller DMS
2.3.	Assessment criteria	20	USA 2009 Smaller DMS
3	The visit	21	USA 2009 Smaller DMS
3.1.	Status of the project	21	USA 2009 Smaller DMS
3.2.	A pre-condition	21	USA 2009 Smaller DMS
3.3.	The first Region	21	USA 2009 Smaller DMS
3.3.1.	An unexpected accommodation	21	USA 2009 Smaller DMS

Section	Section Heading	Page	Document short title
	Figure 3. Asbury Group Systems	22	USA 2009 Smaller DMS
3.3.2.	Data conversion	23	USA 2009 Smaller DMS
3.4.	Applications being converted	23	USA 2009 Smaller DMS
3.4.1.	DMS-level	23	USA 2009 Smaller DMS
3.4.2.	Specialist Systems level	23	USA 2009 Smaller DMS
3.4.3.	External Interfaces - F&I	24	USA 2009 Smaller DMS
3.4.4.	External Interfaces - OEMs	24	USA 2009 Smaller DMS
3.5.	Asbury's central systems	24	USA 2009 Smaller DMS
3.6.	Implementation experiences	25	USA 2009 Smaller DMS
3.6.1.	Current situation	25	USA 2009 Smaller DMS
3.6.2.	"Enterprise" capability	25	USA 2009 Smaller DMS
3.6.3.	Data Conversion	25	USA 2009 Smaller DMS
3.6.4.	System reliability	25	USA 2009 Smaller DMS
3.6.5.	Software content	25	USA 2009 Smaller DMS
3.6.6.	Future plans	26	USA 2009 Smaller DMS
4	User views	26	USA 2009 Smaller DMS
4.1.	Crown Honda	26	USA 2009 Smaller DMS
	Service Department	26	USA 2009 Smaller DMS
	Parts Department	26	USA 2009 Smaller DMS
	Sales Department	26	USA 2009 Smaller DMS
4.2.	Crown Regional Office	27	USA 2009 Smaller DMS
	Administration and Accounting	27	USA 2009 Smaller DMS
	F&I	27	USA 2009 Smaller DMS
5	Conclusions	28	USA 2009 Smaller DMS
6	Accelerated implementation	28	USA 2009 Smaller DMS
	The basis of this review	28	USA 2009 Smaller DMS
	DealerBuilt and Don Wood Automotive		USA 2009 Smaller DMS
	Part 1: DealerBuilt's position in North America - Introduction	29	USA 2009 Smaller DMS
1	Background	29	USA 2009 Smaller DMS
2	The product	30	USA 2009 Smaller DMS
2.1.	Overview	30	USA 2009 Smaller DMS
2.2.	Technical platform	30	USA 2009 Smaller DMS
2.2.1.	Hardware installation support	30	USA 2009 Smaller DMS
2.3.	Applications	30	USA 2009 Smaller DMS
2.4.	OEM interfaces/integrations	30	USA 2009 Smaller DMS
2.5.	Pricing	31	USA 2009 Smaller DMS
3	Conclusions and comments	31	USA 2009 Smaller DMS
3.1.	The "live environment"	31	USA 2009 Smaller DMS
	Part 2: Don Wood Automotive		USA 2009 Smaller DMS
	DealerBuilt's largest DMS customer - as at December 2008		USA 2009 Smaller DMS
	Introduction	32	USA 2009 Smaller DMS
1	Structure of the business	33	USA 2009 Smaller DMS
1.1.	Brands sold	33	USA 2009 Smaller DMS
1.2.	Administration and Systems	33	USA 2009 Smaller DMS
2	Systems	33	USA 2009 Smaller DMS
2.1.	Before LightYear	33	USA 2009 Smaller DMS
2.2.	Current Systems	33	USA 2009 Smaller DMS
	Figure 2. Don Wood Automotive - Business and Systems layout	34	USA 2009 Smaller DMS
2.2.1.	Local hosting or "ASP"?	35	USA 2009 Smaller DMS
2.2.2.	Infrastructure and Security	35	USA 2009 Smaller DMS
2.2.3.	Configuration overview	35	USA 2009 Smaller DMS
2.2.4.	Third Party connections	35	USA 2009 Smaller DMS
	OEMs	35	USA 2009 Smaller DMS
	Finance Networks	35	USA 2009 Smaller DMS
	Other Third Parties	35	USA 2009 Smaller DMS
2.2.5.	Other systems in use	36	USA 2009 Smaller DMS
3	Introduction of LightYear	36	USA 2009 Smaller DMS
3.1.	Data conversion from ERA	36	USA 2009 Smaller DMS
3.2.	Transfer of Applications	37	USA 2009 Smaller DMS
3.3.	Opinions of Management and Users	37	USA 2009 Smaller DMS
3.3.1.	The system in general	37	USA 2009 Smaller DMS
3.3.2.	Sales Department	37	USA 2009 Smaller DMS
3.3.3.	Service Department	38	USA 2009 Smaller DMS
3.3.4.	Parts Department	39	USA 2009 Smaller DMS
3.3.5.	Accounts & Admin.	39	USA 2009 Smaller DMS
3.3.6.	Management viewpoint	40	USA 2009 Smaller DMS
3.3.7.	The "Wish list"	40	USA 2009 Smaller DMS
4	Conclusions	40	USA 2009 Smaller DMS

Please see note on next page...



## A reminder to our Subscribers about our...

### Library and Query service

For those with an interest in "Dealer Systems History", we have a library covering Europe and North America which goes back over 20 years.

If you have difficulty in finding the information you need at any time, or have lost copies of the Analyses which you received, please ask us and we will endeavour to assist.

Our Subscription includes a **Query service**, which is intended to provide clarifications about the content of our Analyses and *Briefings*.

□ It can also be used to discuss a topic privately. A lot of our discussions are private.

### Please tell us about developments

It is always helpful when Subscribers, and others who are involved in the automotive systems business - inform us about new developments and events relating to their products, services and customers.

We will hope to hear from you.

Mike Seaton  
Jo Whittingham

March 2009



The following pages contain...

1. Brief reminders of high points in...

Woods & Seaton *Briefings* for Subscription Years 2006, 2007, 2008

2. Headings for...

Woods & Seaton *Briefings* for Subscription Years 2007, 2008 - up to December 2008

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If you were a Subscriber at the time, and would like a .pdf copy of all *Briefings* for a specific year in a single file to make searching easier, please ask us.



## Briefings - 2006

### A brief reminder of the high points of 2006

North America, Europe and other markets around the world have been affected by the largest ever wave of acquisitions and disposals. There have also been numerous other developments.

#### 1. Acquisitions and Disposals

- ❑ **Volkswagen AG** sold **gedas** to **T-Systems**. Both organisations include significant Dealer Systems operations - **gedas** in the VW Family and **T-Systems** in DaimlerChrysler and BMW.
  - **Comment:** The way in which the combined organisation handles its DMS in future will affect 4,500 Dealers.
- ❑ **UCS** sold its **DARTS business (Germany)** to **the Management**.
  - **Comment:** This released UCS from a complex situation, and is reported to have pleased the customers.
- ❑ **Reynolds & Reynolds** acquired **DCS Automotive**.
  - **Comment:** It appears that it wanted to build its own distribution network in Europe. But almost immediately...
- ❑ **UCS** acquired **Reynolds & Reynolds** - which was a surprise to all (certainly to us!).
  - **Comment:** Almost immediately, **Incadea** was offered for sale, which placed its Partner network in a suspended state until a new owner is known, and created doubts about the future of **DCS Automotive**.
- ❑ **ProQuest Business Systems** acquired **CPD (Ford's EPC) from UCS** and then was acquired by **Snap-on**.
  - **Comment:** **Snap-on** has acquired many businesses, but **PBS** is its first step into the world of OEM data.
- ❑ **DealerTrack (USA)** continued with its series of acquisitions of **Specialist DSPs**, using money from its recent IPO, to become one of the widest-ranging systems providers.
  - **Comment:** This is an organisation with urgent ambition!

#### 2. New multi-national entrants

- ❑ **Microsoft** adopted the **Dynamics-AX ERP-based Infonizer DMS** from Denmark as its own, for sale globally.
  - **Comment:** Microsoft says it is serious about the DMS business, and Partners are being signed up.
- ❑ **SAP** delivered its first DMS - **DBM** - to a pilot user in Switzerland and another in Germany.
  - **Comment:** SAP's revenues are close to 4 times those of ADP Dealer Services and R&R-UCS **combined**, and it is serious about the DMS business. But like other new entrants, it will need to jump all of the hurdles.

#### 3. An OEM endeavours to change the market

- ❑ **GM** launched its **Integrated Dealer Management System** project with specially priced "bundled" configurations of **Quorum's Xsellerator** and **R&R's ERA**.
  - **Comment:** Its objectives are to gain efficiencies via closer integration, and reduce IT costs for Dealers, using smaller DSPs as a stimulant. In effect, it is providing a "guarantee" for buyers of Quorum's DMS.

#### 4. A time for re-thinking!

- ❑ **The actions of UCS** and **GM** have caused all parties in the Dealer Systems market to reconsider their positions. We expect that 2007 will be one of the most important years in its impact on the direction of the Dealer Systems business, with new opportunities, including for the smaller DSPs with histories of reliable, competent service.



## Briefings - 2007

### A brief reminder of the high points of 2007

Just a few items are covered... for a detailed picture, check the lists of *Briefings* on the next 8 pages.

#### 3.1. Acquisitions, Disposals and Retentions

- ❑ **Incadea (Europe)** was (eventually) sold by **R&R** to its previous owners, with assistance from Microsoft.
  - **Comment:** Our Analysis of *The New Incadea - September 2007* covered the current status and potential of the Company, with a review of one of its largest Dealer Group customers.
- ❑ **Arkona (USA)** was acquired by **DealerTrack** and soon afterwards gained an order from one of the large publicly-owned Dealer Groups - **Asbury Automotive**.
  - **Comment:** Our Analysis of *Arkona - a Subsidiary of DealerTrack - July 2007* covered the new situation of the Company, with a review of its largest Dealer Group customer.
- ❑ **Dominion (USA)** acquired **Autobase** - a provider of Dealer "CRM" and showroom systems.
  - **Comment:** Dominion has been acquiring small Specialist DSPs steadily in the past 2 years.  
**There have been many other acquisitions in the Specialist DSPs sector - e.g. JMSolutions acquired DealerUps in the USA, and Manheim acquired RTC in the UK.**
- ❑ **R&R (USA and Europe)** decided to retain **DSC Automotive** - a DSP which R&R acquired immediately before it was acquired by UCS. This surprised many in the market.
  - **Comment:** Our Analysis of *Reynolds & Reynolds European Operations - November 2007* covered the combined previous "UCS" businesses and DCS Automotive.

#### 3.2. "Smaller" DSPs

- ❑ **Many smaller DMS providers in Europe and North America** made good progress during the year, although in terms of publicity they tended to be over-shadowed by the activities of the major DSPs.
  - **Comment:** The search by Dealers for effective and (usually) cheaper alternatives to the "Big 2" continues, e.g. the decision by the Retail Automotive Alliance (RAA) in the UK to adopt Ebbon-Dacs.
- ❑ **SAP** (another vast software organisation, but so far small in DMS) gained its first order in the **USA** for its **DBM** - from **Rush Enterprises** in Texas, which has 50 or more Heavy Truck operations in 10 States.
  - **Comment:** The deal was sold by SAP's Partner - **Titan Technology Partners**. There are no indications to date that SAP will establish a direct sales force to work with Dealers.
- ❑ **Microsoft** (a vast software organisation, but so far small in DMS) is still working via Partners in Europe and North America who have their own DMS. Preparation of its **Infonizer** DMS continues, but no sales in the USA have been announced yet.
  - **Comment:** The Dealers who are waiting for a "White Knight" need to be patient for a little longer.

#### 3.3. Free systems for Dealers

- ❑ **GM** has extended its deal with **Cobalt**, and will offer all of its Dealers free Web sites.
  - **Comment:** But there are no indications yet that it plans to offer all Dealers an *IDMS* at no cost. That would have an impact on the market - and GM's financial resources.

#### 3.4. Lawsuits continue to be plentiful in the USA

- ❑ **R&R** sued **GM**, and **GM** counter-sued **R&R** - all related to the **Saturn** Contract. (See *Briefing 1 - 2008*)
- ❑ **Cobalt** settled a patent suit by **Autobytel** relating to **Dealix** which Cobalt acquired about 2 years ago.
- ❑ **DealerTrack** is still pursuing **RouteOne** and **FinanceExpress** for alleged infringement of a patent.
  - **Comment:** Europe seems to be much less involved in litigation, which helps to compensate for some of its other confusions - e.g. continuing lack of a co-ordinated project equivalent to **STAR**.

#### 3.5. Integrations

- ❑ **Integration of OEM systems with DMS** is a major factor in the way the business works.
  - **Comment:** Our Analysis of *European Developments & Trends - OEM Integration with Dealers - June 2007* covered the current situation and direction of developments, **which also applies to OEMs in North America**. Another Analysis is being prepared, covering system integration and data exchange in North America.



## Briefings - 2008

### A brief reminder of the high points of 2008

This has been a hard year for almost everyone, but with no *dramatic acquisitions* similar to those which took prime positions in 2005 (ADP-Kerridge), 2006 (UCS-R&R) and 2007 (DealerTrack-Arkona).

The essence of the events, developments and trends in a very busy year is summarised below under ten headings. Our apologies if we missed something important... please tell us if we have.

#### 1. Dealer Numbers

Europe and North America have seen reductions caused by the economy and OEMs "trimming" their Networks.

- **Comment:** However, the numbers of **users** of Dealer systems may not reduce to the same extent, as more Sales and Service staff come "on-line", and terminated Dealers are acquired by others or re-open as **Independents**.

#### 2. Acquisitions, Disposals and Retentions

**Reynolds and Reynolds** surprised by acquiring two small DMS providers in Europe and one or two Specialists in the USA. It seems that Chairman Bob does not have a 100% "we build it" policy. But he sold his "too-small" Spanish DMS business, which was acquired as part of DCS Automotive, to **Sage-Cogestib**.

**Dominion Enterprises**, with its cluster of 10+ Specialist DSPs, was made available for sale early in 2008, but we have seen no reports of a disposal. Perhaps NADA 2009 will throw some light on the current situation.

**The FTC** is blocking the merger of CCC and Mitchell in the Collision Systems business. The fear seems to be that it would be similar to ADP and R&R merging in the DMS business.

Various small acquisitions were made by JMsolutions, MSXi, Paradigit, SCI-Torque and others. 2009 will probably see an increase in activity.

#### 3. GM the most prominent OEM in Dealer Systems

The termination of GM's Agreements with R&R for Saturn and *IDMS*, after some public legal "noise", led to **ADP** regaining Saturn, and R&R retaining the large majority of its *IDMS* customers.

- **Comment:** It appeared to be an acceptable resolution for all three Parties - especially ADP.

GM added **Arkona** to its list of *IDMS* providers, to replace R&R. It also agreed to provide all of its Dealers with a **Cobalt** Web site and "digital marketing" support services.

- **Comment:** The priority given to Dealer Systems in 2009 will indicate how strategic they are to GM.

#### 4. The future of Europe's "Block Exemption" (BER) remains unclear

There has been a lot of talk, and "almost an announcement", but currently there is no confirmation of whether there will be a BER from 2010, or what a revised version may include... and the implications for Dealer Systems.

- **Comment:** The initial indications from Brussels caused Dealers and Independents to start feverish lobbying, because they feared that OEMs would gain too much control.

#### 5. Open systems progress - or lack of it!

**North America** continues towards more open integration via STAR and the major DSPs providing interfaces. But several OEMs have not yet become "open" to their Dealers' choices of DMS from smaller DSPs.

A few Specialists in integration are emerging in **Europe**, but acceptance of "open" is far behind North America. However, European legislation gives smaller DSPs a better chance with OEMs than in the USA.

- **Comment:** Some "cross-pollination" would be useful from a Dealer viewpoint.

#### 6. DMS providers

**ADP** and **R&R** continue to dominate North America and the UK. But smaller DSPs continue, some making strong progress, e.g. **Arkona** in the USA and Canada. (A review of its significant progress in **Asbury** is being prepared.)

In **Europe**, **Automaster** and **EDS-MmS** (Incadea) made important progress with large Dealer Groups.

- **Comment:** The economic situation has some advantages for the numerous competent, smaller, lower-cost DSPs. In Europe and North America they hold increasingly important positions.

#### 7. ERP-based DMS

These are so far making slow progress - except **Incadea**. Chairman Bob's disposal has allowed it to leap forward... although still with some major fences to jump.

Another major **ERP** provider is emerging...

**Oracle** is now active, mainly in Asia-Pacific and the Middle East, targeting OEMs with its **Sales Distribution and Aftermarket Solution Set**.

**SAP** continues to target specific customers with its **DBM** - it has a specific strategy.



**Microsoft** has been very quiet, and depends on its Partners - particularly *Infonizer* to gain customers. It seems to be more interested in the "CRM" market at present... but perhaps NADA 2009 will throw some light on its plans.

- ❑ **Comment:** "Traditional" DMS providers (TDPs?) have so far had little to fear from the major *ERP* providers. Also, some of the partnerships which could have emerged between them and the TDPs have not happened.

### 8. Dealer Associations and Co-operatives involved in Systems

During 2008, four - all very different - examples of Dealer "self-help" with systems were reported... **ANAG** (mostly VW), **FHD** (Ford) and **VAPS** (VW-Audi) - all three in Germany, and the **RAA** in the UK.

- ❑ **Comment:** As the automotive business becomes even more competitive, some of these co-operative activities may help in the survival process.

### 9. On-line Digital Marketing

Although in Europe, on-line Digital Marketing is still "emerging", in the USA it is "this year's hot topic", with **ADP** and **R&R** following (in their own ways) **Cobalt** which set off in this direction 2 years ago.

- ❑ **Comment:** The transfer of advertising funds to the *Internet*, and intelligent management of how they are spent, is expected to be a strong theme at the coming **NADA Convention - 24-27 January 2009**.

### 10. OEM vertical integration

OEM requirements for integrating their central systems and databases with those of their Dealers have been increasing in number and complexity, a trend which is expected to continue into 2009 and beyond. It has potential advantages and risks for Dealers, and is an increasing burden on DSPs.

- ❑ **Comment:** Our review of *GM's Global Dealer Systems Strategy* in 2008, and another on *Mercedes-Benz* which is nearly complete, illustrate the importance to OEMs of having close integration and shared access to customer and inventory data.

This is a critical area for agreements between Dealers and Groups and their OEMs ... and their DSPs.

Topics covered in *Briefings* during 2007 - In Topic sequence

Topic	Region	Briefing
<b>□ Sundry Topics</b>		
Another American Group buys UK Dealers	UK	No. 6 - 7. March
Archiving - end of a first generation	North America	No. 17 - 23 July
A sad death in the family	Europe	No. 2 - 26. January
An Update on Italy	Europe	No. 8 - 4. April
A very "individual" Market	Europe	No. 24 - 29. October
A very interesting Dealer Association decision	Europe	No. 9 - 12. April
BER effects - Supermarket car sales	Europe	No. 22 - 11. October
Current situations and trends	Europe	No. 24 - 29. October
Dealer dispute with Dealer Computer Services	USA	No. 13 - 29 May
Growing involvement of major Corporations	International	No. 25 - 26. November
Notes following Briefing No.6.	North America	No. 7 - 13. March
"Open Systems" issue	North America. & Europe	No. 9 - 12. April
Other acquisitions and developments	North America	No. 16 9 July
Partnerships and Alliances - comment	International	No. 9 - 12. April
Specialist DSPs at the NADA Convention	North America...and...	No. 7 - 13. March
USA not always ahead	Europe	No. 22 - 11. October
Used vehicles in the Internet	Europe - France	No. 16 9 July
<b>□ Exhibitions</b>		
Equip 'Auto	Europe	No. 22 - 11. October
Equip 'Auto attendance	Europe	No. 26 - 27. November
Equip 'Auto Exhibition	Europe	No. 24 - 29. October
France	Europe	No. 24 - 29. October
Frankfurt Auto Show	Germany...& International	No. 18 - 14. August
Frankfurt Auto Show - reminder	Germany...& International	No. 19 - 4. September
Further NADA Briefings	Mainly North America	No. 4 - 12. February
IAA results	Europe	No. 22 - 11. October
IAA review - DMS providers in Germany	Europe	No. 20 - 18. September
"Pre-NADA" comments	International	No. 2 - 26. January
NADA Briefings	Mainly North America	No. 3 - 8. February
NADA's Convention approaches - 3-6 February	North America	No. 2 - 26. January
NADA - A look back at the Convention	North America... and...	No. 7 - 13. March
NADA Convention 2008	North America	No. 21 - 19. September
"Smaller" DMS Providers at NADA	Mainly North America	No. 6 - 7. March
<b>□ By Company Name</b>		
ACS and DealerSTAR	North America	No. 19 - 4. September
ADD meeting to promote STAR Standards	Europe and International	No. 15 - 12 June
ADN ... a follow-up comment	UK and USA	No. 8 - 4. April
ADP - another Partner acquired	Asia-Pacific and Mexico	No. 21 - 19. September
ADP "Specialist" systems for the UK	UK... and wider Europe	No. 6 - 7. March
ADP acquires one of its Partners	South Africa	No. 6 - 7. March
ADP acquires Parts Voice from Cobalt	North America	No. 26 - 27. November
ADP and Autodata	North America	No. 27 - 17. December
ADP and Reynolds and Reynolds	North America	No. 25 - 26. November
ADP Europe buys more of its Partners	Europe - Portugal	No. 16 9 July
ADP makes another acquisition	Europe	No. 13 - 29 May
ADP to provide hosting for PFW	North America	No. 19 - 4. September
Arkona now..."A Subsidiary of DealerTrack"	North America and the UK	No. 15 - 12 June
Arkona's Partner in the UK	UK	No. 8 - 4. April

Topics covered in *Briefings* during 2007 - In Topic sequence - continued

Topic	Region	Briefing
Arkona Analysis being delivered	North America	No. 17 - 23 July
Arkona DMS from USA progresses in the UK	Europe	No. 17 - 23 July
Asbury selects Arkona - DealerTrack	USA	No. 23 - 23. October
ASI and MPi	North America	No. 22 - 11. October
Aucon "re-grouped"	Europe	No. 15 - 12 June
Audev-Germany, Cardis-Reynolds	Europe	No. 20 - 18. September
Autobase acquired by Dominion	North America	No. 16 9 July
Auto/Mate - new version of DMS	USA	No. 2 - 26. January
Auto/Mate certification by GM	USA	No. 13 - 29 May
Auto-IT and IBS alliance	Asia-Pacific	No. 8 - 4. April
Auto-IT - Australian DMS progresses in USA	North America	No. 17 - 23 July
Autologica has a new customer in...	Dubai & Iraq	No. 18 - 14. August
Autologica's new Parter for Middle East	International	No. 16 9 July
Automaster's Partner Conference	Europe	No. 12 - 1 May
Autosoft, Auto/Mate, PBS and MPi	North America	No. 26 - 27. November
BIGfni - any news?	North America	No. 26 - 27. November
BMW - light version of Incadea in India	India	No. 2 - 26. January
BMW and Service appointments	USA	No. 13 - 29 May
Chrysler's links to other DSPs	North America	No. 22 - 11. October
Cobalt and GM - Web sites	North America	No. 27 - 17. December
Cobalt and MINI	North America	No. 18 - 14. August
Cobalt and OnStation	North America	No. 2 - 26. January
Cobalt's Integralink and Chrysler	North America	No. 27 - 17. December
Datafirst - a new partnership	Europe	No. 21 - 19. September
DCS Automotive will be retained by R&R-UCS	Europe	No. 3 - 8. February
DealerStar coming	North America	No. 16 9 July
DealerSTAR and ACS	North America	No. 19 - 4. September
DealerTrack - 2nd Quarter results	North America	No. 18 - 14. August
DealerTrack ... the leading "black hole"?	North America	No. 18 - 14. August
DealerTrack acquires Curomax	Canada and USA	No. 2 - 26. January
DealerTrack enters the Leads business	North America	No. 22 - 11. October
DealerTrack to acquire Arkona	USA	No. 11 - 27. April
DealerTrack's lawyers gain further business	North America	No. 7 - 13. March
DealerTrack's views on "open"	North America	No. 17 - 23 July
Dominion acquires Autobase	North America	No. 16 9 July
Drive Technology - another "data exchange"	USA	No. 13 - 29 May
DSPs - business and product developments	Europe	No. 24 - 29. October
GM announces additional IDMS Partners	North America	No. 2 - 26. January
GM Canada and Quorum "integrated"	Canada...& International	No. 18 - 14. August
GM sued by R&R	North America	No. 25 - 26. November
Incadea - Helios and Aucon	Benelux	No. 2 - 26. January
Incadea - progress but no completion yet	International	No. 6 - 7. March
A clarification about Incadea	International	No. 7 - 13. March
Incadea update	Europe and Asia-Pacific	No. 13 - 29 May
Incadea... the world goes around...	International	No. 10 - 23 April
Inchcape selects SAP	International	No. 23 - 23. October
Independent Consultant converts to a DSP	North America	No. 27 - 17. December
Infonizer's first North American customer and...	Mexico	No. 22 - 11. October
Information Providers, Internet Services ...	Europe	No. 24 - 29. October

Topics covered in *Briefings* during 2007 - In Topic sequence - continued

Topic	Region	Briefing
IT 2000 sold	Scandinavia	No. 26 - 27. November
Italy's Automotive Dealer Day (ADD)	Italy and the rest of Europe	No. 14 - 4 June
JMSolutions acquires DealerUps	USA	No. 2 - 26. January
KeyTrak and MyDealerLot	North America	No. 26 - 27. November
LexCom takes PartsLink24 overseas	UK and USA	No. 8 - 4. April
Manheim acquires RTC	UK, and...?	No. 26 - 27. November
MCL - a new (old) DSP in the UK	UK	No. 12 - 1 May
Mercedes-Benz Financial joins RouteOne	North America	No. 21 - 19. September
Microsoft in Dealer Marketing and CRM	North America	No. 18 - 14. August
Microsoft signs its name to another DMS	UK	No. 19 - 4. September
Microsoft's position(s) in automotive systems	International	No. 4 - 12. February
Microsoft related DSPs	International	No. 22 - 11. October
MMI and GM integration	UK	No. 21 - 19. September
MMI gains certification for GM Exchange	UK	No. 12 - 1 May
MMI independent again	UK	No. 26 - 27. November
More Partnerships	USA	No. 13 - 29 May
MSX acquires Actuate	Europe	No. 24 - 29. October
Multiple tiers of Authorised "Dealers"...	Europe	No. 24 - 29. October
NADA satisfaction survey	North America	No. 26 - 27. November
NeoSynergy , AOL and MotorAlley.com	North America	No. 26 - 27. November
North American DMS Providers	International	No. 5 - 26. February
OEConnection - Honda and Mazda	North America	No. 27 - 17. December
OEM-owned Dealers	Europe	No. 22 - 11. October
OEMs	Europe	No. 24 - 29. October
On-line vehicle sales via a "robot"	North America	No. 13 - 29 May
OSA update	USA	No. 13 - 29 May
Oracle in Dealer systems	International	No. 22 - 11. October
Oracle in Dealer systems (?)	Not yet confirmed	No. 21 - 19. September
Oxlo links Karmak heavy truck systems to Ford	USA	No. 13 - 29 May
Oxlo and VW Credit	North America	No. 22 - 11. October
Paris Equip 'Auto	France... & International	No. 19 - 4. September
PBS and RouteOne, and...	North America	No. 26 - 27. November
Peugeot Dealer Association and Vector	Austria	No. 8 - 4. April
Pinewood goes overseas	South Africa and USA	No. 8 - 4. April
Pinewood's free "major upgrade"	Europe - UK	No. 16 9 July
Polk and Roadtodata	International	No. 18 - 14. August
Procar	Europe	No. 20 - 18. September
Quorum and GM	North America	No. 27 - 17. December
Quorum widens its DMS range	North America	No. 15 - 12 June
R&R activity with data exchange Partners	North America	No. 21 - 19. September
R&R buys final shares in DCS Automotive	Europe	No. 20 - 18. September
R&R data access	North America	No. 2 - 26. January
R&R Partnership with Callbright	North America	No. 12 - 1 May
R&R to convert from SAP	North America	No. 12 - 1 May
R&R to develop at home	North America	No. 12 - 1 May
R&R's previous CEO departs	USA	No. 24 - 29. October
R&R-UCS receives an award from STAR	North America	No. 2 - 26. January
New Reynolds & Reynolds - Comment	International	No. 8 - 4. April
Reynolds & Reynolds - more awards	North America	No. 9 - 12. April



Topics covered in *Briefings* during 2007 - In Topic sequence - continued

Topic	Region	Briefing
Reynolds & Reynolds and Who's Calling	North America	No. 19 - 4. September
Reynolds & Reynolds policies	North America	No. 19 - 4. September
R&R sues GM	North America	No. 25 - 26. November
SAP - DBM in Porsche	Germany	No. 14 - 4 June
SAP has its first DMS+ERP customer in...	North America	No. 18 - 14. August
SAP update	Europe and Asia-Pacific	No. 13 - 29 May
Solera ("ADP" Collision Repair) results	International	No. 16 9 July
Specialist DSPs at the NADA Convention	North America...and...	No. 7 - 13. March
STAR implementations progress	North America	No. 18 - 14. August
STAR Standards - ADD meeting to promote	Europe and International	No. 15 - 12 June
TACDIS continues for Volvo Dealers	Scandinavia	No. 26 - 27. November
TimeHighway and Saturn	North America	No. 18 - 14. August
T-Systems - update	Europe... and wider ...	No. 27 - 17. December
T-Systems-gedas integration phase completed	International	No. 2 - 26. January
UCS acquisition of Reynolds & Reynolds	North America	No. 1 - 11 January
UCS acquisition of Reynolds & Reynolds	The world outside	No. 1 - 11 January
VAPS has a new CEO	Germany	No. 18 - 14. August
Vector and Peugeot Dealer Association	Austria	No. 8 - 4. April
VW Credit and Oxlo	North America	No. 22 - 11. October
Werbas change of ownership	Europe	No. 20 - 18. September
ZLS	Europe	No. 20 - 18. September

□ **Summary**

- **28 Briefings published**
- **139 Pages of information**

Topics covered in *Briefings* during 2008 - Analysed in Topic sequence

Topic	Region	Briefing
<b>□ Exhibitions - Reviews</b>		
Australian equivalent of "NADA"	- Australia	No. 21 - 20. August
Automechanika 2008 - Frankfurt	- Germany & Europe	No. 24 - 29. September
Automechanika - DMS in Germany	- Germany	No. 24 - 29. September
Automechanika 2008 - Frankfurt	- Germany & Europe	No. 25 - 14. October
Automechanika 2008 - Overview	- Germany & Europe	No. 23 - 24. September
Automechanika exhibitors	- Germany	No. 21 - 20. August
Automechanika exhibitors - More	- Germany	No. 22 - 9. September
Automechanika - DMS providers with no Stand	- Germany	No. 25 - 14. October
Automotive Dealer Day - Italy ...initial comment	- Europe	No. 14 - 26. May
Automotive Dealer Day - 2008	- Italy	No. 13 - 18. April
Automotive Dealer Day 2008 - Italy	- Europe	No. 15 - 3. June
ADD - DMS Providers on show		No. 15 - 3. June
ADD - Other Providers in the Market	- Italy	No. 15 - 3. June
ADD - Specialist System Providers on show		No. 15 - 3. June
NADA - Clarifications and additions to the four "post-NADA" Briefings		No. 9 - 5. March
NADA - Conclusions	- North America	No. 3 - 15. February
NADA's Convention - A bit more about	- International	No. 2 - 30. January
NADA's Convention - Announcements ahead of ...	- North America	No. 2 - 30. January
NADA's Convention - January 2009	- North America	No. 32 - 15. December
NADA's Convention - local and international points of interest		No. 3 - 15. February
NADA - Innovative systems ... one of the best was not at the show!		No. 3 - 15. February
NADA - DMS developments		No. 3 - 15. February
NADA - Sales systems - Web sites, Front-end, Desking, F&I, "CRM"		No. 6 - 25. February
NADA - Service systems - Appointments, Marketing and "CRM"		No. 5 - 21. February
NADA - Service systems - Technician support, Data and Business Improvement		No. 5 - 21. February
NADA - Specialist Systems and Services		No. 3 - 15. February
NADA's Convention - Specialist Systems & Services - 1		No. 5 - 21. February
NADA's Convention - Specialist Systems & Services - 2		No. 6 - 25. February
NADA's Convention - Specialist Systems & Services - 3		No. 7 - 28. February
Russian "mini-NADA" - 27. August 2008 - Moscow - July	Russia	No. 19 - 31.
STAR's annual pre-NADA meeting		No. 3 - 15. February
<b>□ Sundry Topics</b>		
Acquisition - Another - not yet announced	- USA	No. 32 - 15. December
Acquisitions and changes of ownership		No. 5 - 21. February
BER - More comment on the next	- Europe	No. 15 - 3. June
Block Exemption uncertainties again	- Europe	No. 14 - 26. May
Code-on-the-box - A cat and mouse game	- North America	No. 11 - 3. April
Collision Repair systems		No. 12 - 9. April
Contract Flexibility		No. 32 - 15. December
Co-operations - More between DSPs	- North America	No. 13 - 18. April
Co-operations - More...	- North America	No. 14 - 26. May
Dealer Networks - "snippets"	- International	No. 16 - 17. June
Dealer Systems events ...Two very different but similar situations...		No. 27 - 27. October
Developments and Trends		No. 23 - 24. September
Different orientations in Europe and North America		No. 20- 5. August
DMS - Smaller provider updates	- North America	No. 14 - 26. May
DSPs - A comment on the variety of	- Europe	No. 19 - 31. July



Topics covered in *Briefings* during 2008 - Analysed in Topic sequence - continued

Topic	Region	Briefing
EU regulations - An OEM at the edge of ?	- Europe	No. 29 - 13. November
Europe v North America	- International	No. 15 - 3. June
Expectations		No. 32 - 15. December
Finance and Insurance Networks - including Menu systems		No. 5 - 21. February
"Hot" Topics		No. 32 - 15. December
Independent Dealers - On-line systems for...	- North America	No. 11 - 3. April
Integration and Data Exchange.		No. 5 - 21. February
Looking forward to 2008...	- International	No. 1 - 4. January
Market Info. & Business Analyses Providers	- Europe	No. 7 - 28. February
New Zealand - A Specialist Systems newcomer	- UK initially	No. 4 - 20. February
North America - A brief comment on	- North America	No. 26 - 23. October
OEM developments - Others...		No. 3 - 15. February
OEM Strategies - comment	- Europe	No. 31 - 24. November
Options for Dealers who lose their OEM	- International	No. 33 - 29. December
Other "overview" comments		No. 23 - 24. September
Parts systems		No. 5 - 21. February
Parts systems		No. 6 - 25. February
"Snippets" H125	- Europe	No. 17 - 10. July
"Snippets"	- North America	No. 20- 5. August
"Snippets" ...	- Europe	No. 21 - 20. August
"Snippets"	- North America	No. 21 - 20. August
"Snippets" ...	No. 22 - 9. September	
"Snippets"	- North America	No. 32 - 15. December
Specialists - Others...		No. 7 - 28. February
Specialists, OEMs and others of interest		No. 25 - 14. October
System Integration - Motive Retail - ex-Oxlo team	- USA	No. 30 - 18. November
System interconnections - comment	- Europe	No. 31 - 24. November
Updates on two previous Briefings	- Europe	No. 30 - 18. November
<b>□ By Company Name</b>		
5Square - Audi, T-Systems	- North America	No. 11 - 3. April
5Square assets sold	- USA	No. 20- 5. August
ADP acquires a Dealer Group acquired by R&R	- Europe	No. 14 - 26. May
ADP and Ford's on-line Digital Advertising Prog.	- USA	No. 20- 5. August
ADP and Ford's on-line Digital Marketing	- USA and Canada	No. 18 - 10. July
ADP and GM's IDMS project	- USA and Canada	No. 18 - 10. July
ADP and R&R in parallel again	- North America	No. 32 - 15. December
ADP ARG retains Saturn... for the 2nd time	- USA	No. 16 - 17. June
Advent and e-Validation	- USA	No. 32 - 15. December
Arkona and BMW Service Training	- USA	No. 30 - 18. November
Arkona and Ford DMS	- Canada	No. 30 - 18. November
ASC - progress with Renault	- Germany	No. 10 - 28. March
ASC and F+L - Daughter, not Sister!	- Europe	No. 12 - 9. April
Audev CarIT replaces a SAP DMS	- Mexico	No. 13 - 18. April
Auto/Mate emphasises cost savings... plus	- North America	No. 12 - 9. April
Autobytel's results and a new service	- North America	No. 21 - 20. August
Auto-IT Contract with John Deere	- USA+ Australia	No. 12 - 9. April
Autologica - Dominican Republic	- Caribbean	No. 2 - 30. January
Automaster and Emil Frey Group	- Switzerland	No. 22 - 9. September

Topics covered in *Briefings* during 2008 - Analysed in Topic sequence - continued

Topic	Region	Briefing
Automaster in Italy	- Italy	No. 10 - 28. March
Autonation - Bill Gates invests	- North America	No. 32 - 15. December
Autosoft and GM	- North America	No. 20- 5. August
Autosoft and GM's WorkBenches	- USA and Canada	No. 17 - 10. July
CallCommand now OneCommand	- USA	No. 2 - 30. January
CARman DMS - The last one to go - end of an era	- North America	No. 13 - 18. April
CCC and Mitchell ... "merger of equals"	- North America	No. 13 - 18. April
CCC and Mitchell merger - FTC blocks it...	- USA	No. 32 - 15. December
CCC in Salvage systems	- North America	No. 12 - 9. April
Chome - new customers	- North America	No. 30 - 18. November
Chrome Systems and eBizAutos	- North America	No. 2 - 30. January
Chrysler and Dealer.com Web sites	- North America	No. 26 - 23. October
Contact Advantage re-purchases itself	- UK	No. 2 - 30. January
D.E.C. formally certified by Piaggio	- Italy	No. 21 - 20. August
DAF and multi-make Truck Parts Catalog	- Europe	No. 13 - 18. April
Dealer Web sites - The battle to supply	- USA	No. 16 - 17. June
DealerSocket enters Australia, Canada & the UK	- International	No. 17 - 10. July
DealerTrack	- North America	No. 11 - 3. April
DealerTrack - first half of 2008 results	- North America	No. 21 - 20. August
DealerTrack 3rd Quarter results	- North America	No. 30 - 18. November
DealerTrack Accessories system enhanced	- North America	No. 30 - 18. November
DealerTrack and RouteOne legal action	- North America	No. 26 - 23. October
DealerTrack developments	- North America	No. 30 - 18. November
DealerTrack v RouteOne ...(lawyers still winning)	- North America	No. 21 - 20. August
DealerTrack's Trackworld	- North America	No. 27 - 27. October
Dominion "Cluster" - an interesting situation	- USA	No. 7 - 28. February
EDS-MmS - another Group gained	- Germany	No. 19 - 31. July
EDS-MmS - progress with VW and Opel	- Germany	No. 10 - 28. March
Eight Technology - Also Hyundai, Peugeot & Volvo	- UK	No. 29 - 13. November
Eight Technology and Infiniti	- Europe	No. 30 - 18. November
ERP DMS - Another major Dealer Group adopts	- Europe	No. 14 - 26. May
ETL - Integration for Honda by an Independent..	- UK	No. 22 - 9. September
Experian co-operates with AutoTrader	- UK	No. 29 - 13. November
Fiat's latest showroom system	- Europe	No. 31 - 24. November
Finance Express and Manheim	- USA	No. 11 - 3. April
Ford Certifications	- Germany	No. 30 - 18. November
FordonsData acquires PREAB and Auto 2000	- Scandinavia	No. 32 - 15. December
Freicon - Iveco	- Europe	No. 10 - 28. March
German Market - Current state of	- Germany	No. 23 - 24. September
GM adds Arkona to its IDMS project	- USA and Canada	No. 17 - 10. July
GM and R&R ... a settlement	- North America	No. 12 - 9. April
GM and Reynolds and Reynolds	- North America	No. 3 - 15. February
GM Integrations	- North America	No. 1 - 4. January
GM OneSource changing to STAR	- USA	No. 31 - 24. November
GM takes Cobalt into its Marketing budget	- North America	No. 14 - 26. May
GM's WorkBenches - More about	- USA	No. 16 - 17. June
Gumiyo - Brief note on	- North America	No. 20- 5. August
IAS on R&R list of RCI Certified - and acquired	- North America	No. 11 - 3. April

Topics covered in *Briefings* during 2008 - Analysed in Topic sequence - continued

Topic	Region	Briefing
Incadea - new investment from Greece	- International	No. 19 - 31. July
Incadea - Partner developments	- Europe	No. 2 - 30. January
Incadea and Partners - update	- Europe	No. 10 - 28. March
Incadea's 10th Partner Meeting	- International	No. 27 - 27. October
Infiniti's Sales System from Eight Technology	- Europe	No. 29 - 13. November
Infonizer - further progress	- International	No. 12 - 9. April
Infonizer (Microsoft) new Partners	- International	No. 4 - 20. February
Information Provider stops its service	- UK	No. 8 - 3. March
JMsolutions and Quorum	- USA	No. 21 - 20. August
JMsolutions involved in another expansion	- North America	No. 26 - 23. October
Kalamazoo-Reynolds - POWER in Finance	- UK	No. 21 - 20. August
Kalamazoo-Reynolds buys MMI Automotive	- UK	No. 31 - 24. November
Kia Web sites and "CRM" for Dealers	- USA	No. 17 - 10. July
MarketScan module offered to other DSPs	- North America	No. 11 - 3. April
Mercedes-Benz related developments	- USA	No. 32 - 15. December
Microsoft - Another Dynamics-based DMS	- UK+ Scandinavia	No. 10 - 28. March
Microsoft's Dealer Systems	- International	No. 3 - 15. February
MPK - Ford Integration	- USA	No. 2 - 30. January
MSN and Dealix	- USA	No. 20- 5. August
MSXI acquires Carter & Carter	- Japan	No. 21 - 20. August
NeoSynergy "on-line"	- USA	No. 20- 5. August
NeoSynergy Partnership with PowerDEX	- USA	No. 33 - 29. December
ODS - newcomer in Vehicle Health Checks	- North America+UK	No. 11 - 3. April
OEConnection and GM	- USA	No. 20- 5. August
OEConnection and Hertz	- North America	No. 26 - 23. October
OEConnections - Suzuki joins the family	- USA	No. 2 - 30. January
Oracle in Automotive - an initial view	- International	No. 33 - 29. December
Pinewood - Pendragon Group considers selling	- UK	No. 28 - 11. November
Pinewood makes progress in GM's Networks	- UK	No. 21 - 20. August
POWER customer - Another - but different	- UK	No. 22 - 9. September
Quorum - financing via Microsoft	- North America	No. 30 - 18. November
Quorum Financial Results	- North America	No. 32 - 15. December
Quorum in the USA	- North America	No. 20- 5. August
RAA and Ebbon-Dacs - update	- UK	No. 10 - 28. March
RAA Dealer Buying Association chooses a DMS	- UK	No. 1 - 4. January
Reynolds legal action - Automotive News report	- USA and Canada	No. 17 - 10. July
Reynolds & Reynolds - Acquisition of Diversiform	- North America	No. 31 - 24. November
Reynolds & Reynolds changes its name	- Australia	No. 22 - 9. September
Reynolds & Reynolds - BMW Contract renewal	- Canada	No. 31 - 24. November
Reynolds & Reynolds Developments	- North America	No. 26 - 23. October
Reynolds & Reynolds developments	- North America	No. 31 - 24. November
Reynolds and Reynolds - an acquisition	- BeNeLux & more!	No. 10 - 28. March
Reynolds and Reynolds and its IDMS customers	- USA and Canada	No. 17 - 10. July
Reynolds and Reynolds in the UK	- Europe	No. 8 - 3. March
Reynolds sells DCS Iberica to Sage-Cogestib	- Europe	No. 19 - 31. July
Reynolds v GM / GM v Reynolds - Round 2	- North America	No. 1 - 4. January
RouteOne - developments	- North America	No. 2 - 30. January
RouteOne Red Flag	- USA	No. 30 - 18. November



Topics covered in *Briefings* during 2008 - Analysed in Topic sequence - continued

Topic	Region	Briefing
RouteOne, Toyota FS and StoneEagle	- North America	No. 22 - 9. September
RPMcar goes to Paradigit	- Netherlands	No. 29 - 13. November
SAP DBM Deal...Another - but a bit "unusual"	- Germany	No. 22 - 9. September
SCI acquires MarketQuiz	- North America	No. 21 - 20. August
Solera	- International	No. 12 - 9. April
Solera acquires HPI	- UK... so far	No. 33 - 29. December
Tamara Systems - Integration specialist	- Europe	No. 29 - 13. November
T-Systems update	- Europe	No. 8 - 3. March
UDC's CRM for Fletcher-Jones	- USA	No. 32 - 15. December
VAPS and IS-Handel co-operation	- Germany	No. 29 - 13. November
VAPS names its SAP DMS... and more	- Germany	No. 13 - 18. April
VAPS' SAP-based DMS - progress	- Germany	No. 12 - 9. April
Vector - Iveco in "the Alps"... and more	- Europe	No. 10 - 28. March
Vector and Renault	- Central Europe	No. 32 - 15. December
Vector update	- Europe	No. 8 - 3. March
Vector's Partner meeting	- Europe	No. 29 - 13. November

Please note that...

- Subscribers are always welcome to raise queries by e-mail or phone about the content of our *Briefings*.
  - Our fax does still work, but is very close to retirement.
- Also, if you cannot find your original copy of a *Briefing*, we will send you another.

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As always, comments, queries and suggestions from Subscribers will be welcome.

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