Quick reference to

Woods & Seaton Analyses and *Briefings*

March 2009

This file contains...

1. **Contents Lists** for...

   Analyses for Subscription Years 2006/7, 2007/8, 2008/9 - up to February 2009

   Starting at .pdf Page 2

2. **Topic Headings** for...

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

   Starting at .pdf Page 50

Availability of copies of *Briefings*

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

A reminder to 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

Woods & Seaton Analyses for Subscription Years 2006, 2007, 2008

This file of **Contents Lists** is intended for use in **searching** for specific topics using ***Adobe Reader*.**

Searching for a specific name or topic should find the **Contents List lines** which point to the **Analyses** in which it occurs, with the page numbers**.**

This is a "first edition" of the searchable Contents List. Subscribers are invited to comment on how its usefulness could be improved from their viewpoint.

You are welcome to call or send an e-mail to Mike Seaton with queries and suggestions … **mike@woods-seaton.com**

- It is assumed that our Subscribers are familiar with the *Search* facility in *Adobe Reader*. If you have questions about its use, please ask us.

Note: The right-hand column in the list - **Document short title** - is, for reasons of space, a shortened version of the full Analysis title. The list of Analyses below shows the full title alongside the shortened title.

Subscription Year and full title	Short title
March 2008 to February 2009 Subscription Year - Analyses supplied to Subscribers	
1. International Dealer Systems Providers - SAP - Second Review - June 2008	Internat. 2008 SAP-2
2. GM's Global Dealer Systems Strategy - July 2008	Internat. 2008 GM Strat.
3. Porsche Informatik - Importer, Dealer and Web systems - August 2008	Euro 2008 PI CROSS
4. International Sales Systems - November 2008	Internat. 2008 Sales
5. Mercedes-Benz - Global Dealer Systems - February 2009	Internat. 2009 MB Global
6. North American Developments & Trends - "Smaller" DMS Providers - Feb. 2009	USA 2009 Smaller DMS
Initial two reviews of DSPs and their major customers...	
• DealerTrack-*Arkona* and Asbury Automotive Group Inc.	
• DealerBuilt-*Lightyear* and Don Wood Group	
March 2007 to February 2008 Subscription Year - Analyses supplied to Subscribers	
1. European Developments & Trends - Italy - June 2007	Euro-Italy 2007
2. European Developments & Trends - OEM Integration with Dealers - June 2007	Euro Integration 2007
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
March 2006 to February 2007 Subscription Year - Analyses supplied to Subscribers	
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
North American Developments & Trends - November 2006	
4. Volume 1 - The Market, OEMs and Dealer Systems Providers	USA 2006 Vol 1
5. Volume 2 - OEM-Dealer Projects, Dealers & Groups	USA 2006 Vol 2
6. International Dealer Systems Providers - February 2007	International DSPs 2007

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Searchable Contents List

Please see note on next page…

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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

Availability of copies

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*
Sundry Topics		
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. &d 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
Exhibitions		
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
By Company Name		
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

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

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*
❑ Exhibitions - Reviews		
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 -	Russia	No. 19 - 31. July
STAR's annual pre-NADA meeting		No. 3 - 15. February
❑ Sundry Topics		
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

❑ By Company Name

5Square - Audi, T-Systems	- North America	No. 11 - 3. April
5Square assets sold	- USA	No. 20- 5. August
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Please note that...

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  - 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.

* * * * *

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

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