

Prepare your strategy today for software success tomorrow...

Personal Computer Software Market, 1989-1994

Current and Prospective Software Vendors:

- FORECAST your potential market for the next five years efficiently
- EVALUATE the nontraditional software vendors now entering the market and how this trend affects you
- INCREASE YOUR MARKET SHARE by effectively restructuring your software strategy
- DEVELOP your successful software profile based on your customers' real needs, requirements, and criteria
- COMPETE SUCCESSFULLY by assessing your competitors' software strategies
- MAXIMIZE YOUR R & D and customer support strategy by delivering what customers REALLY WANT
- VALIDATE your strategic marketing and development strategies

IS Managers and PC Software Buyers:

- MAKE THE RIGHT CHOICE by selecting the software that will continue to pay off for you
- GET THE MOST FOR YOUR MONEY by rating current and prospective software vendors
- STAY AHEAD by evaluating how future software trends will benefit you

(Revised from prior brochure)

**Lotus, Ashton-Tate,
Microsoft, WordPerfect,
and more...**

**are profiled in INPUT's
*Personal Computer
Software Market,
1989-1994 report***

Information that's CRUCIAL for Software

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Personal Computer Software Market, 1989-1994

Market Size and Forecasts

- Overall Market 1989-1994
- Systems Software by Sub-Delivery Mode
- Applications Software
- Largest Markets
- Growth
- Top Vendors—Market Coverage
- Market Forces
- Market Opportunities
- Processing Services/Professional Services Companies

Issues and Trends

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- Funding Sources
- New Applications and Improvements
- Total Solutions / Bundled Marketing
- Entry of Service Companies into the Software Market
- Impact of Large Computer Systems Vendors on the PC Market
- Software VARs—Alternative Marketing Approaches
- Open Systems Architectures
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- New Technologies
- Networking Solutions

Competitive Environment

- Competitive Strategies
- Characteristics/Functionality of Successful PC Software Products
- Software Company Profiles

Recommendations & Conclusions

Hardware saturation, controversies over standards and operating systems, new competitors (such as nontraditional software vendors), and an increasingly sophisticated user base present formidable challenges for software vendors. The stakes are just as high for personal computer managers and buyers who need a successful software solution that works into the next decade.

Both vendors and users need the right answer now to these urgent questions.

WHAT'S THE MAJORTREND IN SOFTWARE DEVELOPMENT?

More-powerful software for standalone systems? Networking PCs with mainframes? Operating system standardization? Networkable solutions for PCs? Validating, assessing, and evaluating current strategies against future trends will optimize your profit and opportunities in the 1990s.

WHAT INGREDIENTS MAKE A SUCCESSFUL SOFTWARE PACKAGE?

INPUT's *Personal Computer Software Market, 1989-1994*, provides you with the recipe for success. The successful software profile, based on thorough research and user interviews, gives you a comprehensive, detailed analysis of each of the components that make software packages succeed.

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Success in the 1990s

WHAT DO USERS REALLY WANT?

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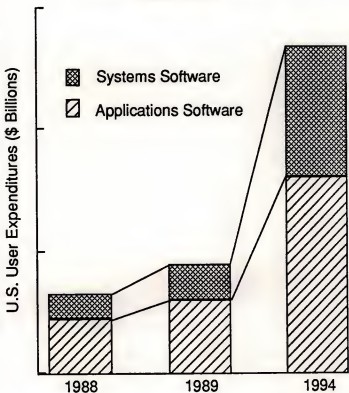
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WHAT DO IS MANAGERS REALLY NEED TO KNOW?

INPUT's *Personal Computer Software Market, 1989-1994* gives ratings and evaluations of software and vendors from the user's point of view. INPUT demonstrates how you can weigh all the criteria, including vendor stability, operating system compatibility, technical support, and software characteristics—and come up with the winning software solution for you.

Total Personal Computer/Workstation Software Expenditures 1988-1994



Source: INPUT

Base your development strategy on the actual size of your potential market, as determined by INPUT's market intelligence and in-depth vendor and user interviews.

Available November 1989

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About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multient client studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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the 1990s, the number of people in the world who are under 15 years of age is expected to increase from 1.1 billion to 1.5 billion.

There are a number of reasons why the world's population is growing so rapidly. One of the main reasons is that the number of children born to each woman has increased. This is due to a number of factors, including the fact that women are now having children at a younger age, and that they are having more children. Another reason is that the number of people who are surviving to old age has increased. This is due to a number of factors, including the fact that people are now living longer, and that there are more people in the world who are old.

The rapid growth of the world's population is a major concern for many people. One of the main concerns is that the world's resources will be used up. This is because the world's population is growing so rapidly, and that the world's resources are being used up so quickly. Another concern is that the world's environment will be destroyed. This is because the world's population is growing so rapidly, and that the world's environment is being destroyed so quickly.

There are a number of ways in which the world's population can be controlled. One way is to reduce the number of children born to each woman. This can be done by providing women with access to family planning services. Another way is to reduce the number of people who are surviving to old age. This can be done by providing people with access to health care services.

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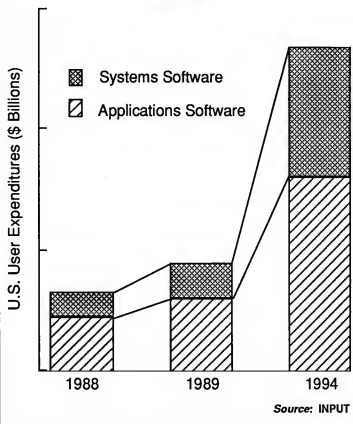
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the 1990s, the number of people in the UK who are aged 65 and over has increased from 10.5 million to 13.5 million, and the number of people aged 75 and over has increased from 4.5 million to 6.5 million (Office for National Statistics 2000).

There is a growing awareness of the need to address the needs of older people, and the need to ensure that the health care system is able to meet the needs of older people. The Department of Health (2000) has published a strategy for older people, which sets out the government's commitment to improve the health and well-being of older people, and to ensure that the health care system is able to meet the needs of older people.

The strategy for older people is based on three main pillars: health, social care, and housing. The strategy aims to improve the health and well-being of older people, to ensure that older people have access to the services they need, and to ensure that older people are able to live in their own homes for as long as possible.

The strategy for older people is a key part of the government's commitment to improve the health and well-being of older people, and to ensure that the health care system is able to meet the needs of older people. The strategy is based on three main pillars: health, social care, and housing.

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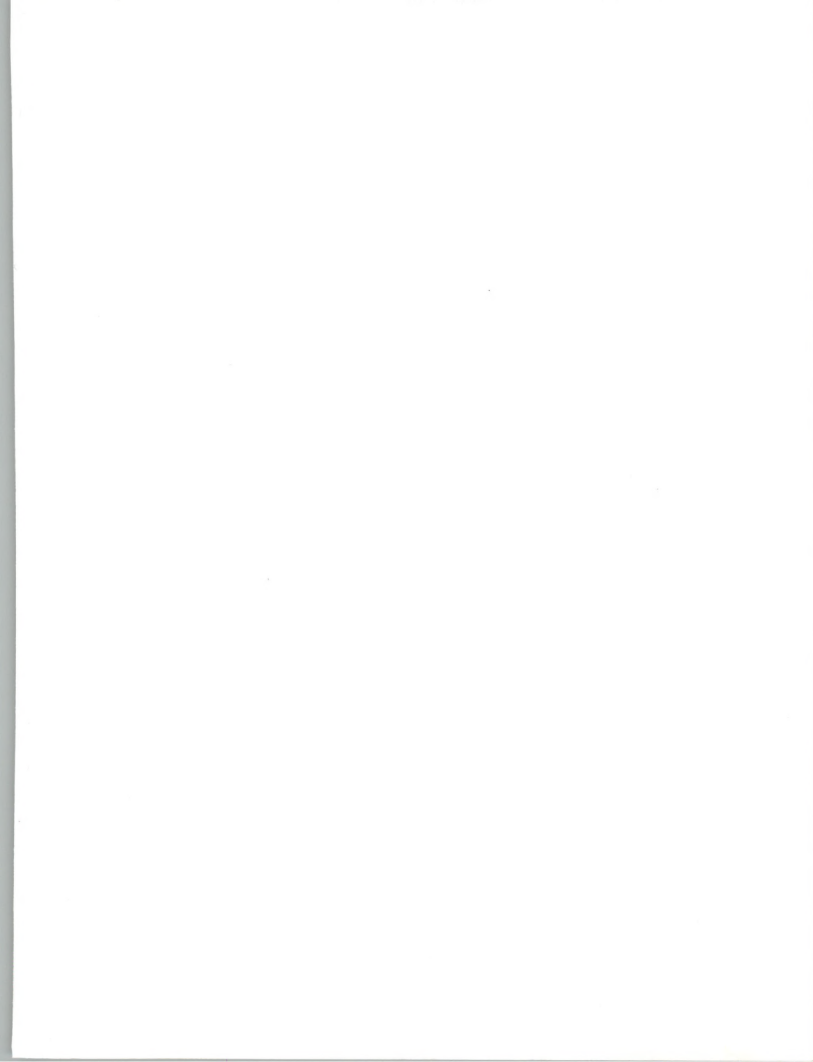
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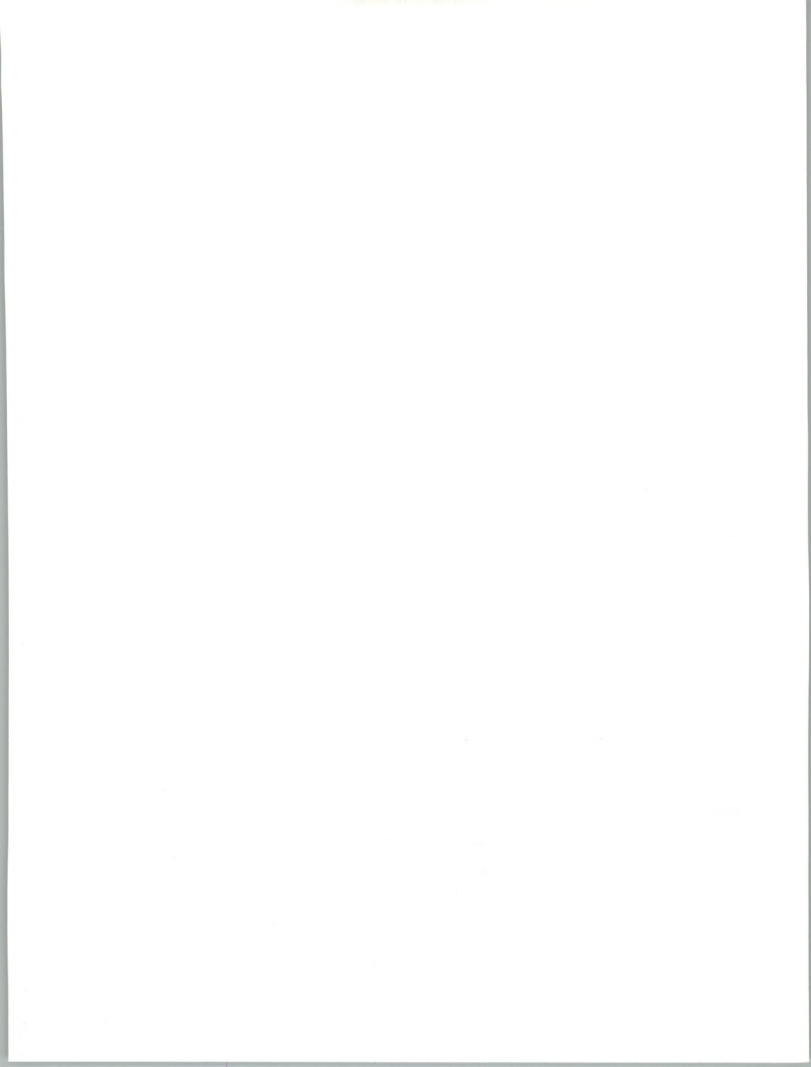
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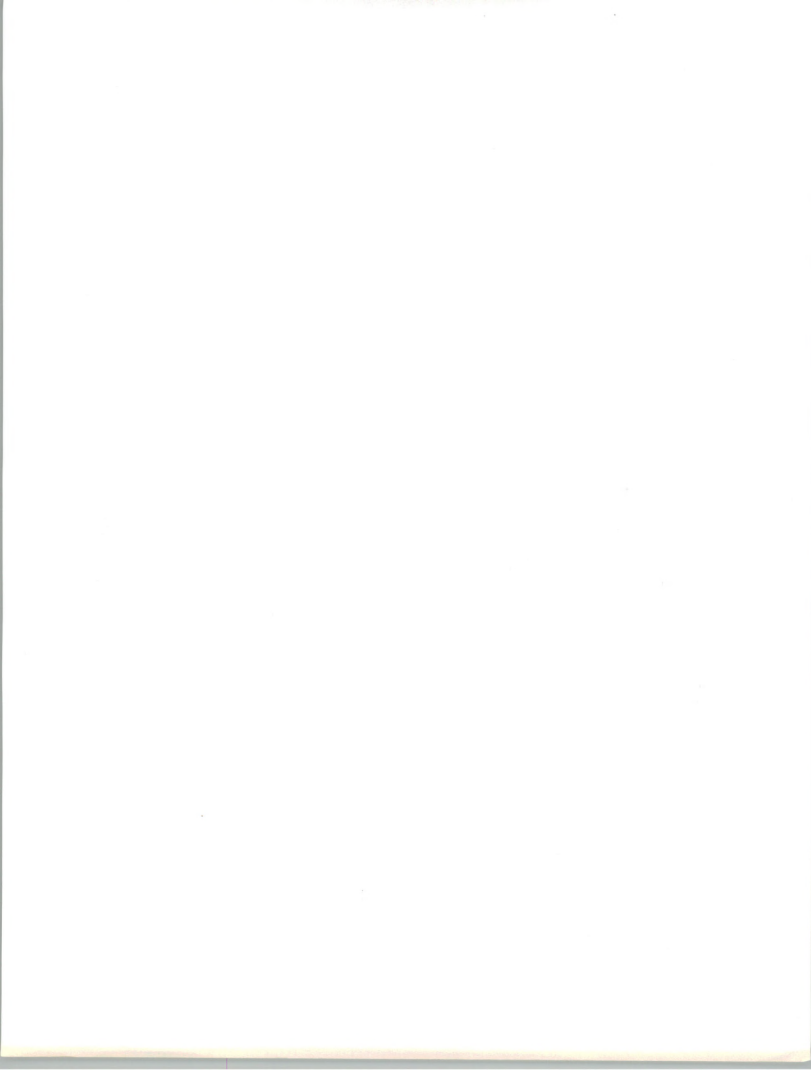
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The just-completed, *Personal Computer Software Market, 1989-1994* report, focuses on the reasons behind this growth, identifies product characteristics and support services required by users, describes vendors' support and product strategies and discusses the implications and opportunities for vendors of software products.

To receive your copy of this pivotal report, please mail or fax the enclosed order form, or call INPUT at (415) 961-3300.

Best regards,



Robert L. Goodwin
Vice President

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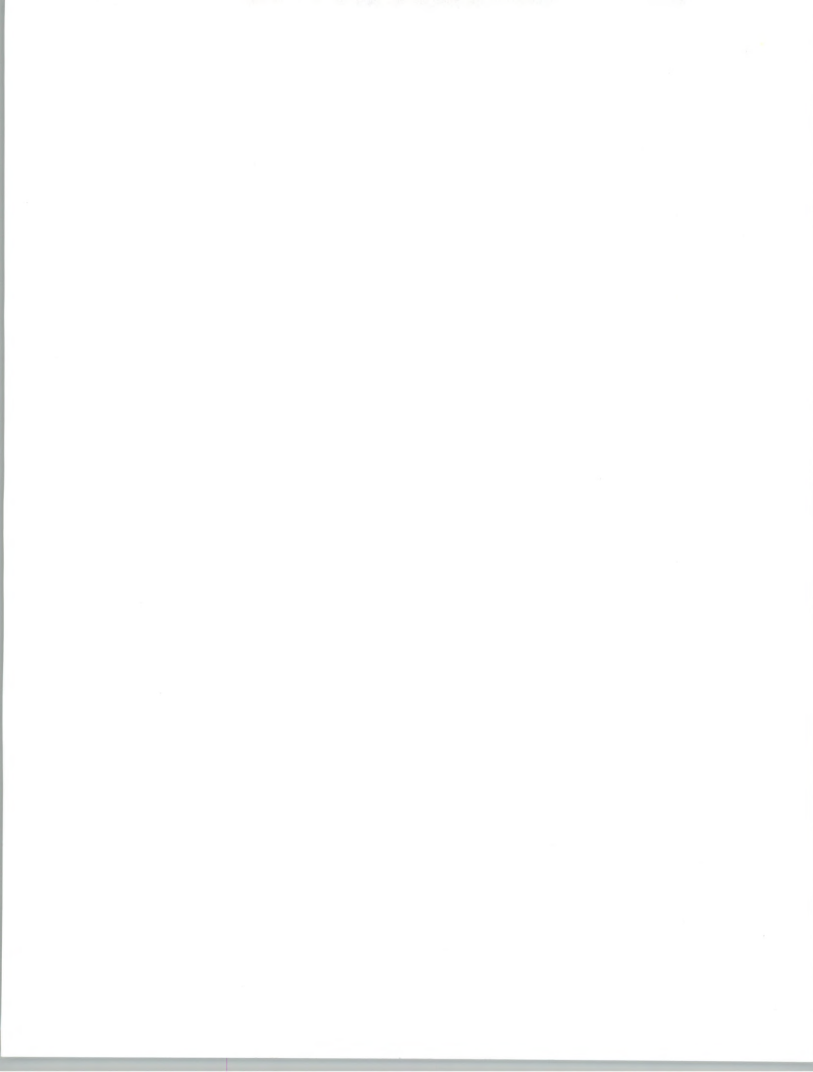
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PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

Many studies and reports have been produced in recent months that examine the "hypothetical" personal computer user and his future requirements. In Personal Computer Software 1989 - 1994, INPUT places emphasis on the perceptions and real needs of the end users and emerging technologies based on vendor and users interviews. The report reviews and analyzes the issues, trends, and market forecasts of the personal computer software market in three areas: 1) System software, 2) cross-industry applications software, and 3) industry specific applications software.

The future direction of software markets is to networking solutions involving transparent sharing of software processing among PC/workstations, minicomputers, and mainframes. Many of the applications currently running on mainframes will be run on workstations under a distributed processing model. Minis and mainframes will be used increasingly for communications/database applications within the distributed model.

With the lowered cost of the personal computer and its availability to the individual in the work environment and at home for personal use, there is a need for software that will fulfill the needs of both of these types of use. Software to run the systems and the applications has become paramount to the success of the personal computer.

PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

Based on experience and leadership in projecting and forecasting the information services market, INPUT is producing the Personal Computer Software Report, 1989 - 1994 to explore and discuss the major forces driving the personal computer software market. Through interviews with personal computer users and software vendors, the study will:

Forecast the personal computer software market size and growth from 1989 to 1994.

Identify the drivers and inhibitors that will influence this market.

Examine the current installed configurations of personal computers and user plans for future installations.

Leading vendors in the personal computer software market are identified and examined in the report.

Vendor offerings and user requirements are identified and compared.



Vendor and user issues and concerns regarding personal computer software are identified and examined.

Vendor strategies in product and support areas as well as recommendations for the profile of a successful software product are discussed.

YOU SHOULD READ THIS REPORT IF YOU ARE:

A Software Vendor:

Participating in or considering entering the personal computer software market.

Responsible for personal computer software strategy development.

Responsible for personal computer software market development.

A Major Personal Computer User or Buyer:

Interested in gaining a better understanding of vendor personal computer software development plans.

Interested in examining potential personal computer software service and support offerings.

TOTAL PERSONAL COMPUTER / WORKSTATION SOFTWARE EXPENDITURES
1988-1994

Overall CAGR (1989-1994) = 25%

User Expenditures (the vertical measurement) in \$ Billions
(bar chart)

segment	1988	1989	1994	CAGR (89-94)
Application S/W	4.6	6.1	17.7	24%
Systems S/W	2.1	2.9	9.9	28%
Total PC S/W	6.7	9.0	27.5	25%



Personal Computer Installed Configuration

two pie charts side-by-side showing the following pictures

1988

standalone	58%
linked to mainframe	23%
linked to other PCs	19%

1989

standalone	39%
linked to mainframe	25%
linked to other PCs	36%

PERSONAL COMPUTER SOFTWARE REPORT, 1989 - 1994

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Executive Summary

Market Size and Forecasts

Issues and Trends

Competitive Environment

Recommendations

Conclusions



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FROM: Joanne Ponnwitz

DATE: 11-16-89

PAGES: 1 of 5

TYPE: CONFIDENTIAL CORRESPONDENCE YES NO
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CHARGE CODE: MPCS

COMMENTS: Sheila:

Here are Tom's comments/corrections to the brochure. It looks good, That's the benefit of having a Marketing person write the brochure, rather than a research person.

Joanne

EDS. GM. McDonnell Douglas
CSI. and more... profiled in
INPUTS (Name) report

INPUT ⁽¹⁾

Prepare your strategy today for software success in the '90s *tomorrow*

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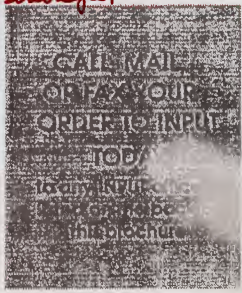
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Product SW

trends



① Validating, assessing,
& evaluating your
current strategies
against future trend
will optimize your
profit & opportunity
in the 1990's

Information that's **CRUCIAL** for Software

(a based on primary research. This provides you with the strategic

INPUT's Personal Computer Software Report gives you the information you need most to succeed in the 1990's. ~~Developers who back the wrong strategy may not survive the rapidly changing market of the 1990's. Managers and buyers who choose today's software without understanding tomorrow's needs risk significant losses to more knowledgeable competitors.~~

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<ul style="list-style-type: none"> • Overall Market 1989-1994 • Systems Software by Sub-Delivery Mode • Applications Software • Largest Markets • Growth • Top Vendors—Market Coverage • Market Forces • Market Opportunities • Processing Services/Professional Services Companies
Issues and Trends
<ul style="list-style-type: none"> • Overall Issues—User & Vendor Trends • Funding Sources • New Applications and Improvements • Total Solutions / Bundled Marketing • Entry of Service Companies Into the Software Market • Impact of Large Computer Systems Vendors on the PC Market • Software VARS—Alternative Marketing Approaches • Open Systems Architectures • Standards • New Technologies • Networking Solutions
Competitive Environment
<ul style="list-style-type: none"> • Competitive Strategies • Characteristics/Functionality of Successful PC Software Products. • Software Company Profiles

WHAT'S THE MAJOR TREND IN SOFTWARE DEVELOPMENT?

More powerful software for stand-alone systems? Networking PC's with mainframes? Operating system standardization? Networkable solutions for PC's? ~~The right answers can set your marketing and R & D development strategies on the path to success in the 1990's. Development based on inaccurate assumptions about market trends can result in costly detours that could have catastrophic consequences for you and your company.~~ ①

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thorough

We've Got the Answers!

INPUT'S Personal Computer Software Report, 1989-1994:

Strategic Information you need TODAY for Software Success Tomorrow

see Conclusion

(2) Vendors & planners
need to know how the
potential market share
of systems SW, applic. SW,
& total PC SW affects
your strategies.

Success in the 1990s

WHAT DO USERS REALLY WANT?

INPUT interviewed users ~~extensively~~ to determine what they really want from their software vendors. Major personal computer software buyers rated their needs in order of importance. These include transportability, software characteristics, ease of use, vendor reputation, and IBM compatibility. INPUT's Personal Computer Software Report reveals which of these requirements is really the most important.

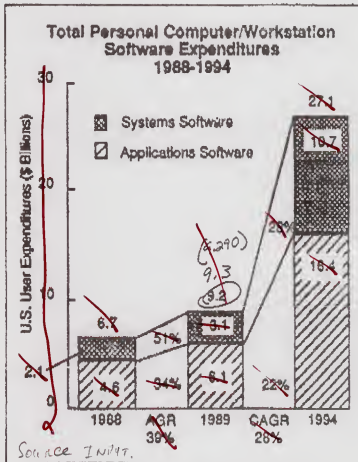
WHAT'S THE ACTUAL SIZE OF YOUR POTENTIAL MARKET?

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Base your development strategy on the actual size of your potential market, as determined by INPUT's market intelligence, and in-depth vendor and user interviews.

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1. The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that proper record-keeping is essential for the integrity of the financial system and for the ability to detect and prevent fraud.

2. The second part of the document outlines the specific requirements for record-keeping, including the need to maintain original documents and to keep copies of all records for a minimum of seven years.

3. The third part of the document discusses the consequences of failing to comply with these requirements, including the possibility of fines and imprisonment.

4. The fourth part of the document provides a detailed explanation of the various types of records that must be maintained, including invoices, receipts, and bank statements.

5. The fifth part of the document discusses the importance of regular audits and the role of independent auditors in ensuring the accuracy of the records.

6. The sixth part of the document provides a summary of the key points discussed in the document and offers some final thoughts on the importance of record-keeping.

7. The seventh part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that proper record-keeping is essential for the integrity of the financial system and for the ability to detect and prevent fraud.

8. The eighth part of the document outlines the specific requirements for record-keeping, including the need to maintain original documents and to keep copies of all records for a minimum of seven years.

9. The ninth part of the document discusses the consequences of failing to comply with these requirements, including the possibility of fines and imprisonment.

10. The tenth part of the document provides a detailed explanation of the various types of records that must be maintained, including invoices, receipts, and bank statements.

11. The eleventh part of the document discusses the importance of regular audits and the role of independent auditors in ensuring the accuracy of the records.

12. The twelfth part of the document provides a summary of the key points discussed in the document and offers some final thoughts on the importance of record-keeping.

(4)

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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8-2-66

TABLE 1

Date	Time	Temperature		Wind	Clouds	Remarks
		Air	Sea			
8-2-66	0800	15	18	10	2	
	1200	18	20	15	3	
	1600	17	19	12	4	
	2000	16	18	10	5	
	2400	15	17	8	6	
8-3-66	0800	14	17	10	3	
	1200	17	20	15	4	
	1600	16	19	12	5	
	2000	15	18	10	6	
	2400	14	17	8	7	
8-4-66	0800	13	16	10	4	
	1200	16	19	15	5	
	1600	15	18	12	6	
	2000	14	17	10	7	
	2400	13	16	8	8	

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