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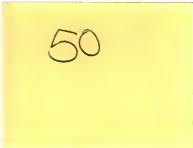
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Research Summary

Independent Maintenance— Western Europe, 1989-1994

- Complete Market Analysis
- A New Study
- Available Immediately

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Abstract

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The report provides an assessment of vendor perceptions and opinions relating to the driving forces and inhibitory factors that are influencing market activity and growth within the European independent maintenance market. Data is also provided on vendor activity within different sectors of the market, for example those related to system size, manufacturer and industry type.

Also contained within the report is an analysis of nine individual country markets, namely France, the United Kingdom, West Germany, Italy, Austria, Belgium, the Netherlands, Spain and Sweden.

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Research Summary

This research summary provides a précis of the contents of INPUT's report, *Independent Maintenance—Western Europe, 1989 - 1994*.

A

Introduction

INPUT's report, *Independent Maintenance Western Europe, 1989-1994*, produced as part of INPUT's Customer Service Programme—Europe, examines the Western European market for independent maintenance services. The report provides a comprehensive study and analysis of the market and discussion of the various factors that influence market development. The report contains:

- A market forecast for Western Europe overall—segmented by vendor type, TPM, Dealers and Distributors, and Equipment Vendors
- Market forecasts for nine major Western European country markets which are also segmented by vendor type
- Listings of leading independent maintenance vendors in Western Europe and in each individual country market
- Profiles of 84 independent maintenance vendors throughout Western Europe
- Listings of major merger and acquisition activities that have taken place in the 1988/89 time frame amongst independent maintenance vendors
- An analysis of vendor opinions on the factors that are influencing growth and contributing to the competitive environment
- Discussion of factors that are inhibiting the market and the likely impact of merger and acquisition activity

Many reasons are given for the acceptance and continuing development of the phenomenon of independent maintenance. The principal factors cited by users are listed in exhibit A.

EXHIBIT A**The Case for
Independent Maintenance**

- Choice
- Single source
- Multivendor
- Cost
- Local service
- Flexibility
- Quality

B**Market Opportunities**

INPUT's forecast for the independent maintenance market is illustrated in Exhibit B. INPUT sizes the market at around \$1.5 billion in 1989, forecasting that it will grow at a compound annual growth rate of over 15% over the next five years.

The report discusses the growth of the independent maintenance market for equipment suppliers, where the manufacturer provides multivendor service on sites that include their own equipment.

INPUT analysed nine individual country markets, namely France, the United Kingdom, West Germany, Italy, Austria, Belgium, the Netherlands, Spain and Sweden. Of these country markets, the United Kingdom is by far the largest, with France being the second largest market. The fastest growing market is that of Spain which is likely to achieve a growth rate nearly twice that of the European average.

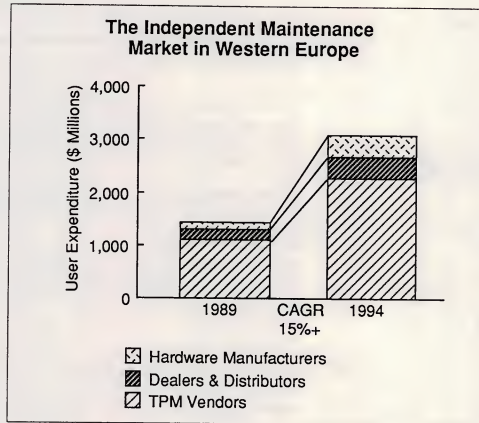
The report examines each country market in some detail, discussing:

- Competitive environment
- Market characteristics
- Growth factors
- Market inhibitors

The country markets are each analysed for three separate categories of vendors:

- Independent vendors (third-party maintainers)
- Dealers and distributors
- Equipment vendors

EXHIBIT B



C

Market Dynamics

The development of the independent maintenance market is subject to a variety of factors. The most significant of these are listed in Exhibit C: the movement towards the provision of other services, pressure to provide a pan-European presence and perhaps partly as a result of that, the trend towards increasing the size of the operation through merger and acquisition activity.

In order to expand their businesses and respond to the users' requirements for additional services, many independent maintenance companies are seeking to extend their range of services by offering, for example, consultancy and disaster recovery services. Other additional activities include equipment and software sales, media and supplies sales and training. Reducing margins on traditional equipment maintenance markets is also a major factor driving this trend.

EXHIBIT C

Market Dynamics

- Move to provide non-maintenance services
- Pan-European trend
- Merger and acquisition activity

The trend towards Pan-European growth continues in the independent maintenance market as companies strive to achieve a competitive international presence. Examples of vendors actively extending their European coverage are Granada, Sorbus, Thomainfor and Econocom. This trend will continue within the momentum of change brought about by the Single European Market initiative and as independent maintainers strive to meet the service needs of multinational companies.

Growth ambitions and the need to develop pan-European coverage are major factors in the trend towards increasing merger and acquisition activity. Clearly, the purchase of other companies in different countries or market sectors gives the acquirer the opportunity to penetrate new country markets and acquire different skills to meet different sector needs.

However, the action of large pan-European companies may potentially blur one of the distinct advantages of the independent maintainer, the responsiveness and flexibility of the small organisation.

D**Vendor Analysis**

INPUT's survey of the independent maintenance market in Western Europe includes the identification of leading vendors for each country as well as for the total market. Exhibit D identifies the five leading independent maintainers. However, the ranking of leading vendors is continually changing through merger and acquisition activity.

Additionally, the report profiles eighty-four Western European independent maintenance vendors. These profiles provide:

- Company address and telephone number
- Vendor revenues for 1988
- Revenue forecasts for 1989

EXHIBIT D

**Leading TPM Vendors in
Western Europe**

- Granada
- Sorbus
- Control Data
- Geveke
- IBIMAINT

- Number of staff employed at various levels within the service organization
- Number of service centres
- Type of equipment serviced

INPUT concludes that the independent maintenance market will continue to offer opportunities in all three segments of the market for the foreseeable future. Specific opportunities extend not only to the range of equipment serviced and to investment in the growth of traditional hardware maintenance activities, but to the provision of services other than traditional hardware maintenance.

The result of these changes is that in some cases, new names are appearing among the list of European independent maintenance companies. More significantly, these new names are of companies not previously known as participants in the European independent maintenance market.

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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.

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The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry should be supported by a valid receipt or invoice. This ensures transparency and allows for easy verification of the data.

In the second section, the author outlines the various methods used to collect and analyze the data. This includes direct observation, interviews with staff, and the use of specialized software tools. Each method is described in detail, along with its strengths and limitations.

The third section presents the findings of the study. It shows that there is a significant correlation between the accuracy of the records and the overall efficiency of the system. The data indicates that areas with higher record accuracy also show faster processing times and fewer errors.

Finally, the document concludes with several recommendations for improving record-keeping practices. These include implementing standardized procedures, providing regular training for staff, and investing in more robust software solutions. The author believes these steps are essential for ensuring the long-term success of the organization.

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the model. The model is a function of the input variables and the output variable. The model is defined as:

$$Y = f(X) + \epsilon \quad (1)$$

where Y is the output variable, X is the input variable, f is the function and ϵ is the error term.

The function f is assumed to be linear and the error term ϵ is assumed to be normally distributed with zero mean and constant variance.

The linear regression model is the most common model used in regression analysis. It is a simple model that is easy to interpret and use. The linear regression model is defined as:

$$Y = \beta_0 + \beta_1 X + \epsilon \quad (2)$$

where Y is the output variable, X is the input variable, β_0 is the intercept, β_1 is the slope and ϵ is the error term.

The linear regression model is a simple model that is easy to interpret and use. It is a good starting point for understanding regression analysis.

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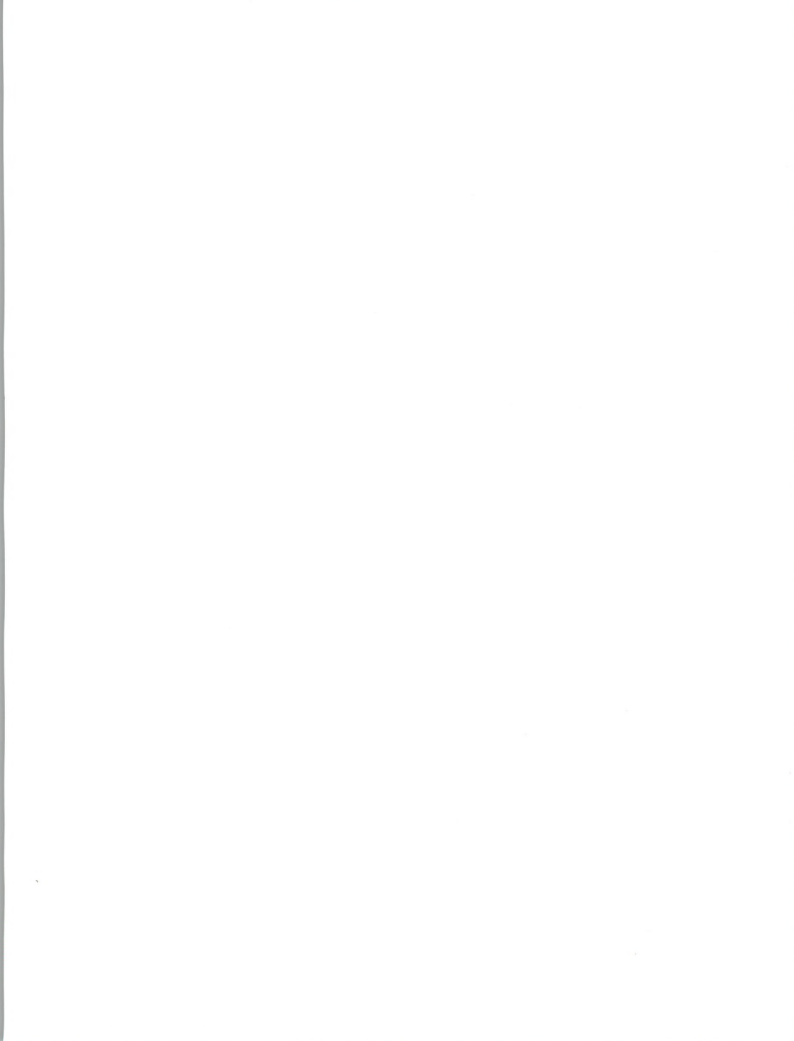
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EXHIBIT A

**The Case for
Independent Maintenance**

- Choice
- Single source
- Multivendor
- Cost
- Local service
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- Quality

B**Market Opportunities**

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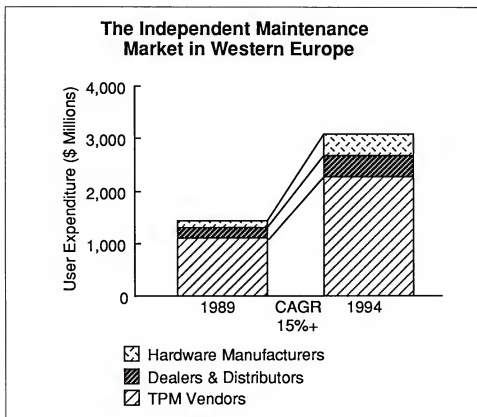
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EXHIBIT B



C

Market Dynamics

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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 the following principles: (1) to improve the health and well-being of older people; (2) to ensure that the health care system is able to meet the needs of older people; (3) to ensure that older people are able to live independently; (4) to ensure that older people are able to participate in society; (5) to ensure that older people are able to live in their own homes; (6) to ensure that older people are able to live in their own communities.

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EXHIBIT C

Market Dynamics

- Move to provide non-maintenance services
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- Merger and acquisition activity

The trend towards Pan-European growth continues in the independent maintenance market as companies strive to achieve a competitive international presence. Examples of vendors actively extending their European coverage are Granada, Sorbus, Thomainfor and Econocom. This trend will continue within the momentum of change brought about by the Single European Market initiative and as independent maintainers strive to meet the service needs of multinational companies.

Growth ambitions and the need to develop pan-European coverage are major factors in the trend towards increasing merger and acquisition activity. Clearly, the purchase of other companies in different countries or market sectors gives the acquirer the opportunity to penetrate new country markets and acquire different skills to meet different sector needs.

However, the action of large pan-European companies may potentially blur one of the distinct advantages of the independent maintainer, the responsiveness and flexibility of the small organisation.

D**Vendor Analysis**

INPUT's survey of the independent maintenance market in Western Europe includes the identification of leading vendors for each country as well as for the total market. Exhibit D identifies the five leading independent maintainers. However, the ranking of leading vendors is continually changing through merger and acquisition activity.

Additionally, the report profiles eighty-four Western European independent maintenance vendors. These profiles provide:

- Company address and telephone number
- Vendor revenues for 1988
- Revenue forecasts for 1989

EXHIBIT D

**Leading TPM Vendors in
Western Europe**

- Granada
- Sorbus
- Control Data
- Geveke
- IBIMAINT

- Number of staff employed at various levels within the service organization
- Number of service centres
- Type of equipment serviced

INPUT concludes that the independent maintenance market will continue to offer opportunities in all three segments of the market for the foreseeable future. Specific opportunities extend not only to the range of equipment serviced and to investment in the growth of traditional hardware maintenance activities, but to the provision of services other than traditional hardware maintenance.

The result of these changes is that in some cases, new names are appearing among the list of European independent maintenance companies. More significantly, these new names are of companies not previously known as participants in the European independent maintenance market.

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the 1990s, and the 1990s have seen a significant increase in the number of people who are taking part in leisure activities. This is reflected in the fact that the number of people who are taking part in leisure activities has increased from 1.5 million in 1980 to 3.5 million in 1995. This increase is due to a number of factors, including the fact that people are living longer, and are therefore able to enjoy more leisure time. It is also due to the fact that people are becoming more health conscious, and are therefore more likely to engage in leisure activities that are good for their health.

There are a number of reasons why people are taking part in leisure activities. One reason is that people are looking for ways to relax and unwind after a long day of work. Another reason is that people are looking for ways to improve their physical health and fitness. Finally, people are taking part in leisure activities because they enjoy them. This is reflected in the fact that people are spending more time on leisure activities than they are on work. This is a positive trend, and it is one that we hope to see continue in the future.

There are a number of different types of leisure activities, and people are taking part in a wide variety of them. Some of the most popular leisure activities include watching television, reading, and listening to music. Other popular leisure activities include going to the gym, playing sports, and traveling. People are also taking part in a number of different types of leisure activities that are good for their health, such as walking, swimming, and gardening. This is a positive trend, and it is one that we hope to see continue in the future.

There are a number of factors that are influencing the growth of the leisure industry. One of the most important factors is the fact that people are living longer, and are therefore able to enjoy more leisure time. Another important factor is the fact that people are becoming more health conscious, and are therefore more likely to engage in leisure activities that are good for their health. Finally, people are taking part in leisure activities because they enjoy them. This is a positive trend, and it is one that we hope to see continue in the future.

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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 set out a strategy for the health care system, which includes a commitment to improve the health care of older people. The strategy is based on the following principles:

- To ensure that older people have access to the same quality of health care as younger people.
- To ensure that health care is tailored to the needs of older people.
- To ensure that health care is delivered in a way that is respectful of the dignity and autonomy of older people.

The strategy is based on the following principles: to ensure that older people have access to the same quality of health care as younger people; to ensure that health care is tailored to the needs of older people; and to ensure that health care is delivered in a way that is respectful of the dignity and autonomy of older people.

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to the extent that the model is able to capture the underlying structure of the data.

As a first step, we will assume that the data are normally distributed. The normal distribution is a simple model, but it is also a good approximation for many real-world data sets. The normal distribution is defined by two parameters: the mean and the variance. The mean is the average of the data, and the variance is a measure of the spread of the data. The normal distribution is symmetric and bell-shaped. The probability density function (PDF) of the normal distribution is given by:

$$f(x) = \frac{1}{\sigma\sqrt{2\pi}} \exp\left(-\frac{(x-\mu)^2}{2\sigma^2}\right)$$

where μ is the mean and σ is the standard deviation. The normal distribution is a good approximation for many real-world data sets, but it is not always appropriate. For example, the normal distribution is not suitable for data that are skewed or have heavy tails. In such cases, other distributions, such as the log-normal distribution or the gamma distribution, may be more appropriate.

One way to check if the normal distribution is a good fit for the data is to plot the data against the normal distribution. This is done by plotting the empirical cumulative distribution function (ECDF) of the data against the theoretical cumulative distribution function (CDF) of the normal distribution. If the two curves are close, then the normal distribution is a good fit. If the curves are far apart, then the normal distribution is not a good fit.

Another way to check if the normal distribution is a good fit for the data is to plot the data against the normal distribution. This is done by plotting the empirical PDF of the data against the theoretical PDF of the normal distribution. If the two curves are close, then the normal distribution is a good fit. If the curves are far apart, then the normal distribution is not a good fit.

One of the main advantages of the normal distribution is that it is a simple model. It is easy to estimate the parameters of the normal distribution, and it is easy to calculate the PDF and CDF. This makes the normal distribution a popular choice for many applications. However, the normal distribution is not always appropriate. For example, the normal distribution is not suitable for data that are skewed or have heavy tails. In such cases, other distributions, such as the log-normal distribution or the gamma distribution, may be more appropriate.

In conclusion, the normal distribution is a simple model that is a good approximation for many real-world data sets. It is defined by two parameters: the mean and the variance. The normal distribution is symmetric and bell-shaped. The PDF of the normal distribution is given by the equation above. The normal distribution is a good approximation for many real-world data sets, but it is not always appropriate. For example, the normal distribution is not suitable for data that are skewed or have heavy tails. In such cases, other distributions, such as the log-normal distribution or the gamma distribution, may be more appropriate.

One way to check if the normal distribution is a good fit for the data is to plot the data against the normal distribution. This is done by plotting the empirical CDF of the data against the theoretical CDF of the normal distribution. If the two curves are close, then the normal distribution is a good fit. If the curves are far apart, then the normal distribution is not a good fit.

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the 1990s, the number of people aged 65 and over in the United States is projected to increase from 20 million to 35 million (U.S. Census Bureau 1996).

As the number of people aged 65 and over increases, the number of people aged 75 and over is also expected to increase. In 1990, there were 10 million people aged 75 and over in the United States. By 2000, the number is projected to increase to 15 million. By 2010, the number is projected to increase to 20 million (U.S. Census Bureau 1996). The increase in the number of people aged 75 and over is expected to be even more rapid than the increase in the number of people aged 65 and over.

As the number of people aged 75 and over increases, the number of people aged 85 and over is also expected to increase. In 1990, there were 3 million people aged 85 and over in the United States. By 2000, the number is projected to increase to 5 million. By 2010, the number is projected to increase to 7 million (U.S. Census Bureau 1996). The increase in the number of people aged 85 and over is expected to be even more rapid than the increase in the number of people aged 75 and over.

As the number of people aged 85 and over increases, the number of people aged 95 and over is also expected to increase. In 1990, there were 1 million people aged 95 and over in the United States. By 2000, the number is projected to increase to 2 million. By 2010, the number is projected to increase to 3 million (U.S. Census Bureau 1996). The increase in the number of people aged 95 and over is expected to be even more rapid than the increase in the number of people aged 85 and over.

As the number of people aged 95 and over increases, the number of people aged 100 and over is also expected to increase. In 1990, there were 200,000 people aged 100 and over in the United States. By 2000, the number is projected to increase to 400,000. By 2010, the number is projected to increase to 600,000 (U.S. Census Bureau 1996). The increase in the number of people aged 100 and over is expected to be even more rapid than the increase in the number of people aged 95 and over.

As the number of people aged 100 and over increases, the number of people aged 105 and over is also expected to increase. In 1990, there were 20,000 people aged 105 and over in the United States. By 2000, the number is projected to increase to 40,000. By 2010, the number is projected to increase to 60,000 (U.S. Census Bureau 1996). The increase in the number of people aged 105 and over is expected to be even more rapid than the increase in the number of people aged 100 and over.

As the number of people aged 105 and over increases, the number of people aged 110 and over is also expected to increase. In 1990, there were 2,000 people aged 110 and over in the United States. By 2000, the number is projected to increase to 4,000. By 2010, the number is projected to increase to 6,000 (U.S. Census Bureau 1996). The increase in the number of people aged 110 and over is expected to be even more rapid than the increase in the number of people aged 105 and over.

About INPUT

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