

Conférence INPUT
19 mai 1992

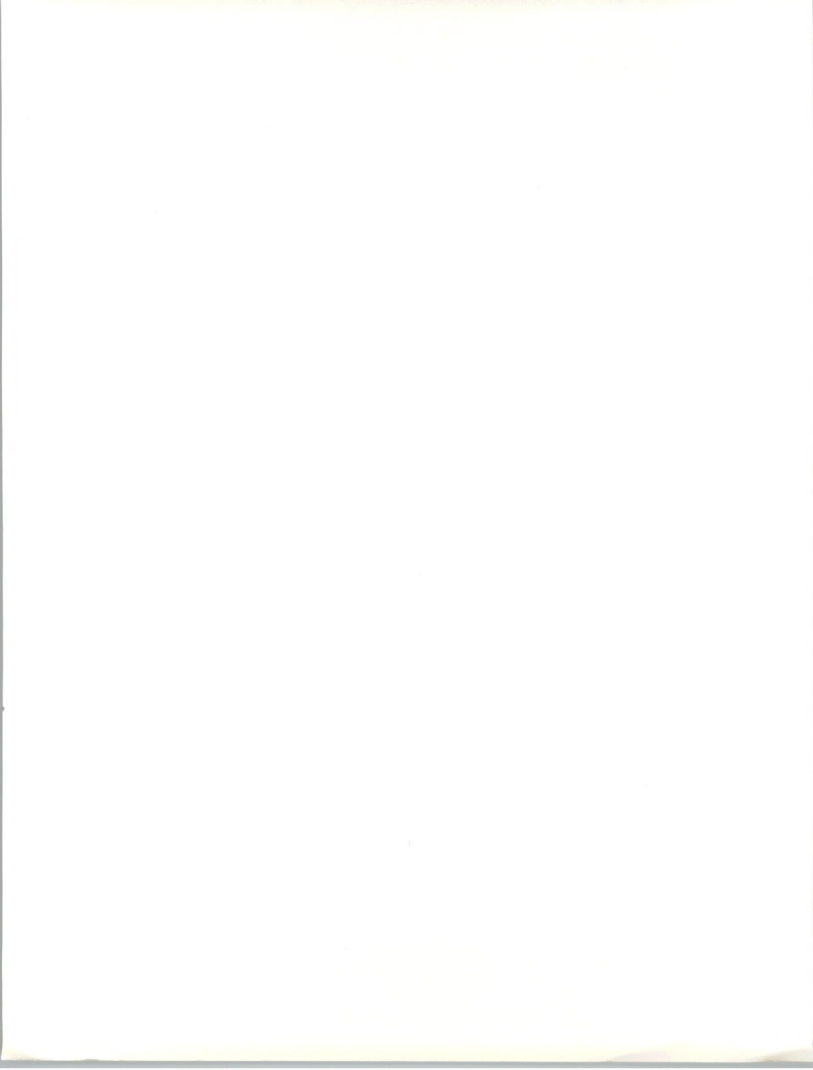
Bilan & Perspectives Pour Les
Marchés Des Services

L'incontournable pousée du "Downsizing"

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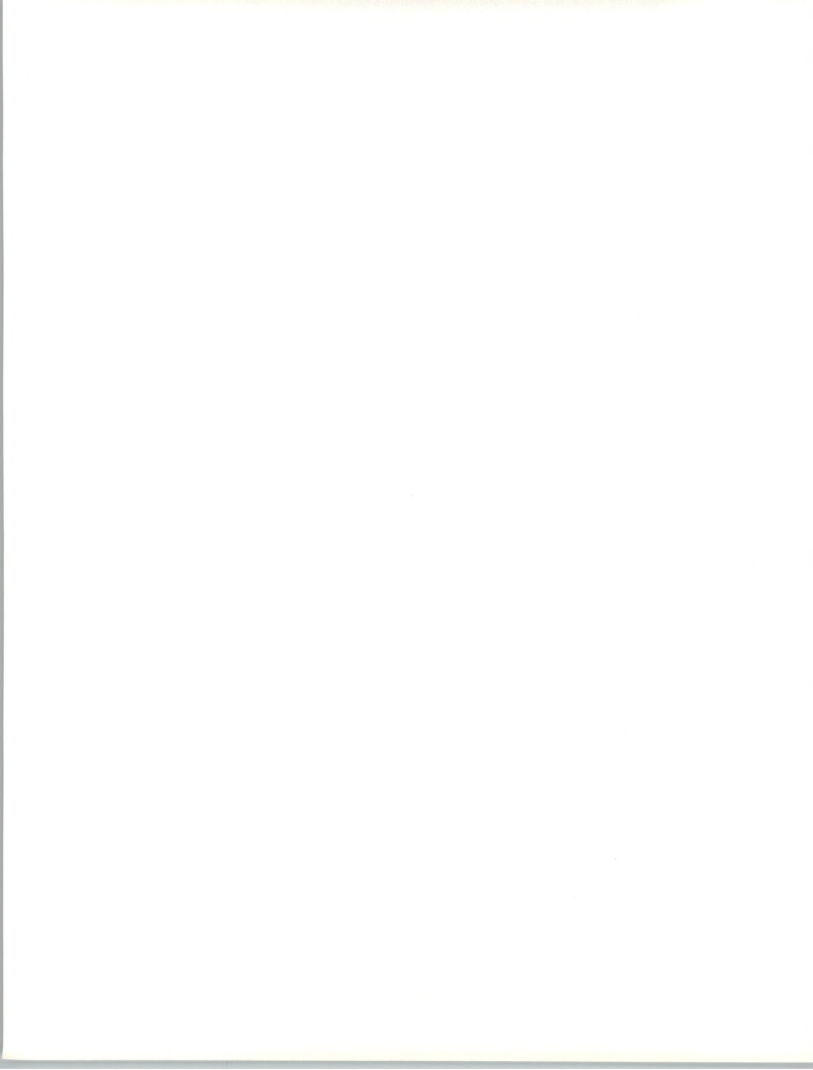
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Information Services Industry European Market Trends in Software and Services

E-IS-16

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Notes



Software and Services, Europe

Key Industry Trends

- Projects downsized
- Outsourcing satisfies
- Price pressure on services
- Pan-European support
- Desktop entrants

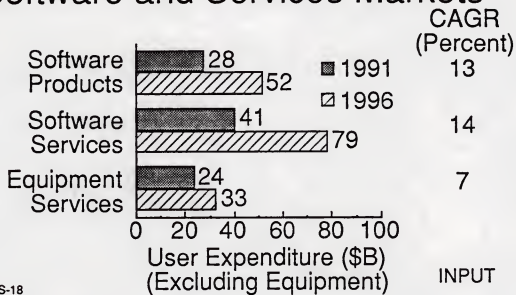
E-IS-17

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Europe

Software and Services Markets

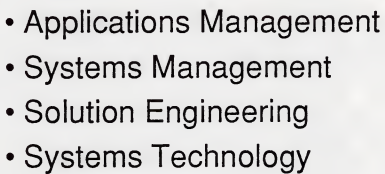


E-IS-18

Notes



Vendor-Added Value

- 
- Applications Management
 - Systems Management
 - Solution Engineering
 - Systems Technology

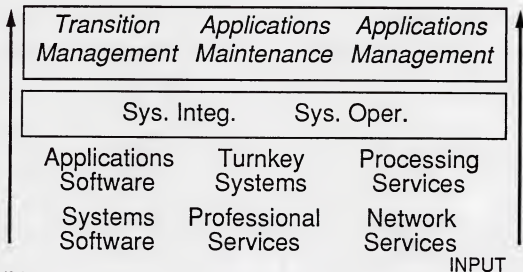
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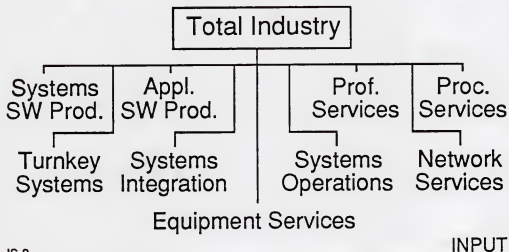
Product and Service Trends



Notes



Information Services Industry Structure



Notes



Software and Services, Europe, 1991

Leading Vendors

Vendor	1991 \$B	Rank	
		1991	1990
IBM	5.3	1	1
Digital	1.7	2	5
SNI	1.7	3	2
CAP Gemini Sogeti	1.7	4	3

E-IS-21

INPUT

Notes



Software and Services, Europe, 1991

Leading Vendors

Vendor	1991 \$B	Rank	
		1991	1990
Reuters	1.5	5	4
Microsoft	1.0	6	9
Andersen Consulting	0.9	7	8
Groupe Bull	0.8	8	6

E-IS-22

INPUT

Notes



Software and Services, Europe, 1991

Leading Vendors

Vendor	1991 \$B	Rank	
		1991	1990
Unisys	0.7	9	7
EDS	0.7	10	30
Sema Group	0.7	11	10
Finsiel	0.7	12	11

E-IS-23

INPUT

Notes



Software and Services, Europe, 1991

Leading Vendors

Vendor	1991 \$B	Rank	
		1991	1990
Computer Assoc.	0.7	13	12
Sligos	0.6	14	15
Oracle	0.5	15	20

E-IS-24

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Notes



Europe

Delivery Mode Issues

- Turnkey systems—Impacted by downsizing and open systems margins
- Applications software products—Smaller systems dominate
- Systems software products—Prices under pressure

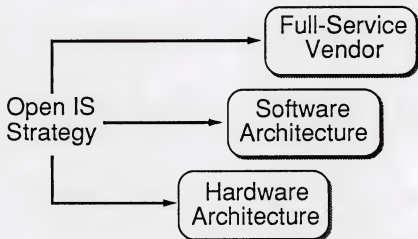
E-IS-25

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Notes



Vendor Selection Trends



E-IS-26

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Notes



Europe

Delivery Mode Issues

- Network services—High-growth opportunities
- Systems operations—Renewed satisfaction, desktop entrants
- Systems integration—Project downsizing for fast payback

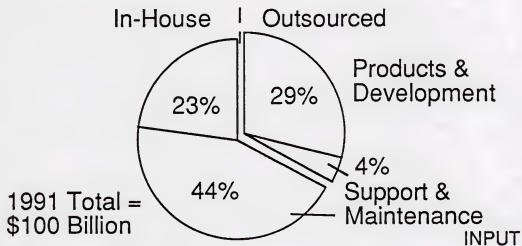
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E-IS-27

Notes



European User Software Budgets



Notes



Europe

Delivery Mode Issues

- Professional services—
Competition up, growth down
- Processing services—Specialized
applications drive development
- Equipment services—Multivendor
and environmental services grow

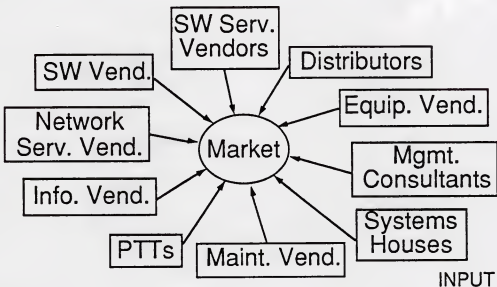
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E-IS-29

Notes



Increasing Competition



E-IS-30

Notes

Chapter 2

The first part of the chapter discusses the importance of understanding the context of the data being analyzed. This includes identifying the source of the data, the methods used to collect it, and any potential biases or limitations. It is crucial to ensure that the data is representative and that the analysis is based on sound statistical principles.

The second part of the chapter focuses on the various statistical tests used to analyze data. This includes parametric tests such as the t-test and ANOVA, as well as non-parametric tests like the Mann-Whitney U-test and the Kruskal-Wallis test. Each test has its own assumptions and is used to answer specific questions about the data.

The final part of the chapter covers the interpretation of the results of the statistical tests. This involves understanding the p-value, the confidence interval, and the effect size. It is important to communicate the results clearly and to avoid over-interpreting the data. The chapter concludes with a summary of the key points and a list of references.

Software and Services
Forecast, 1992-1997
Europe

13% CAGR
. . . and falling

E-IS-31

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Notes



The Impact of Downsizing on Software and Services

- Software re-engineering
- Customer services perspective

E-AD-1a

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Notes



Software Re-engineering

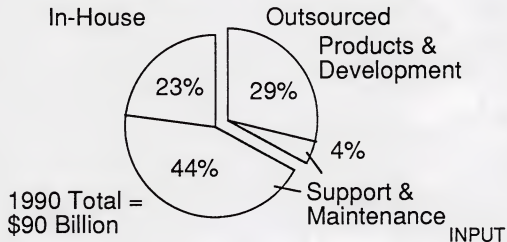
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Notes



European User Software Budgets



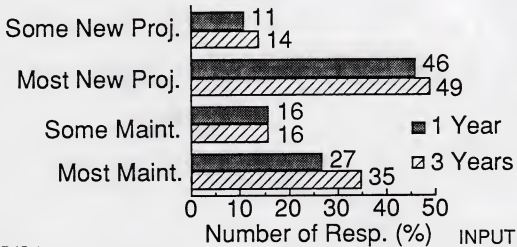
E-AD-3

Notes

4/20/92



CASE Project Usage Plans Europe

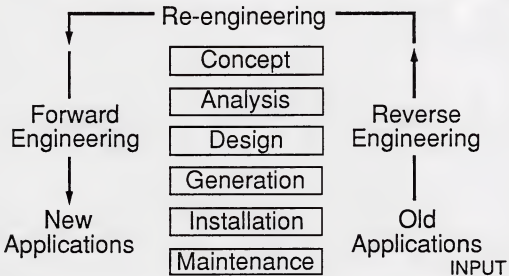


E-AD-4

Notes



The Software Life-cycle



E-AD-5

Notes



Software Re-engineering

- Drivers
 - Established business practices
 - Reverse engineering tools
 - Portable software platforms

E-AD-6a

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Notes



Software Re-engineering

- Inhibitors
 - Change and business re-engineering
 - Object-oriented design
 - Downsizing

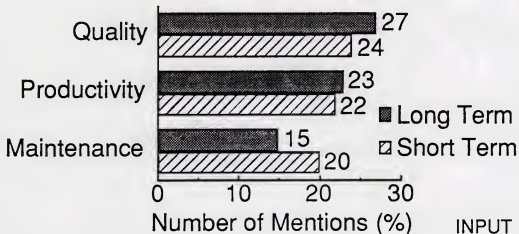
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Notes



Payback Expectations of CASE Users

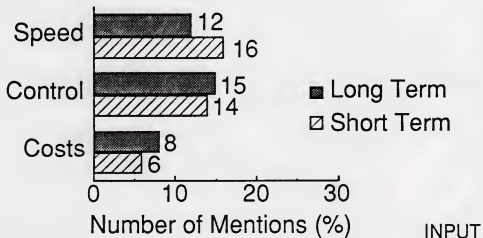


E-AD-7

Notes



Payback Expectations of CASE Users

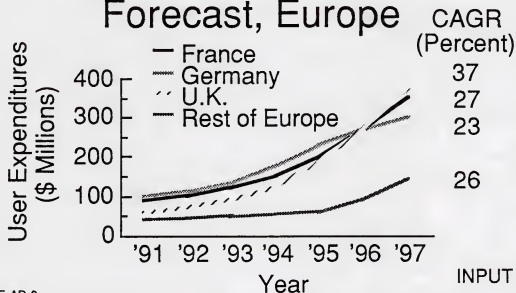


E-AD-8

Notes



CASE Software Products Forecast, Europe



E-AD-9

Notes



CASE-Related Initiatives

- Methodologies
- Software standards
- Software quality
- Organisational changes
- Training
- Team management

E-AD-10

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Notes



Application Questions

- Drop
- Hold
- Re-engineer
- New development
- New package

E-AD-11

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Notes



Impact of Downsizing

- Systems
- Projects
- Timescales
- Budgets
- Management

E-AD-12

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Notes



Customer Services Perspective

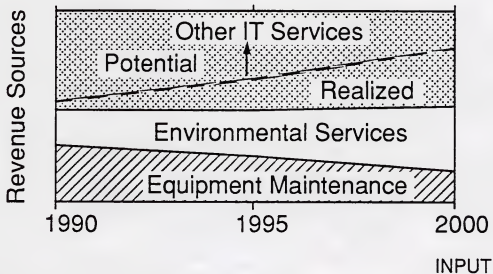
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Notes



IT Customer Services



E-CS-97

Notes



Impact of Downsizing

- Maintenance squeezed
- Focus on SME/PME
- Desktop services

E-CS-98

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Notes



Repositioning

- SI
- Business continuity
- Networks
- Human resources
- Cross-industry assimilation

E-CS-99

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Notes



New Offerings

Percent of Business	Percent of Vendor Sample
≤10	50
11 - 20	25
21 - 25	8
26 - 40	17

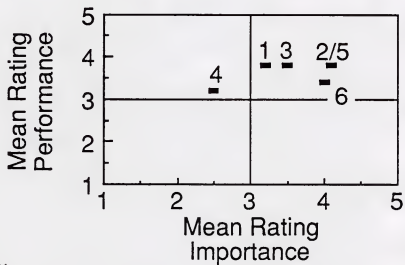
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Notes



Performance vs. Importance



E-CS-101

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Notes



Legend

1 = Planning & Design

2 = Network Services

3 = Software Services

4 = Human Resources

5 = Disaster Recovery

6 = Security Services

E-CS-102

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Notes



Desktop Services

- One solution
- Open window
- Range of approaches

E-CS-103

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Notes



Traditional Desktop

- PC supply
- Network/server
- PC/printer maintenance
- Installation
- Training

E-CS-104

INPUT

Notes



New Services

- ASP supply/support
- Help desk selection/supply
- Problems management
- Planning/administration
- Network upgrades
- Application development

E-CS-105

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Notes



Approaches

Standalone



1.

Outsourcing



2.

Solution

3.

INPUT

E-CS-106

Notes



Selection Criteria

- Network expertise
- Single supplier
- Up-to-date
- Independence
- Pan-European

E-CS-107

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Notes



Digital's Service Offering

- Part of Bespoke Services
- 4 service lines
- Mix and Match
- Sales - Force
 - DECdirect

E-CS-108

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Notes



Digital

Strengths	Weaknesses
<ul style="list-style-type: none">• Name• Catalogue• Networking• I-stop• Multivendor	<ul style="list-style-type: none">- Hardware image- Confusing offerings- Impartial?- Not highlighted

E-CS-109

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Notes



Hewlett-Packard's Service Offering

- Standard contracts
- Multivendor—including 3rd-party software
- Consultancy/customisation
- Specialist groups

E-CS-110

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Notes



Hewlett-Packard

Strengths

- Premier on support
- Tailored contracts
- Strong networking
- Support for Oracle, Ingres, etc.
- Own & multivendor

Weaknesses

- Differentiated
- Technical orientation
- Weak SO

E-CS-111

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Notes



PrimeService's Service Offering

- Network planning/design
- Single-source 'Desktop'
- Standard supply/maintenance
- Multivendor 'One-Call'

E-CS-112

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Notes

4/24/92



PrimeService

Strengths

- Software skills
- Integration skills
- Networking
- Multivendor

Weaknesses

- Specialist
- Technical
- Commercial
- Marketing clout
- Weak SO

E-CS-113

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Notes



Computeraid Service Offering

- Blank paper
- Selective large contracts
- Learn on the job

E-CS-114

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Notes



Computeraid

Strengths	Weaknesses
<ul style="list-style-type: none">• PC hardware maintenance• Help desk skills• Financial• Clear strategy	<ul style="list-style-type: none">- ASP skills- Maintenance culture- Selling to end users

E-CS-115

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Notes

- Wong, J. M. S., & Chan, S. C. (2000). The effects of a 12-week Tai Chi program on the health of elderly Chinese. *Journal of Aging and Health, 12*, 102-112.
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Data Logic Service Offering

- Branded product/service
- Mix and match
- Installed base
- Pan-European intention

E-CS-116

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Notes



Data Logic

Strengths	Weaknesses
<ul style="list-style-type: none">• International• Skills mix• Focussed service line• Independent	<ul style="list-style-type: none">- Uneven- ASP skills- Pan-European(?)

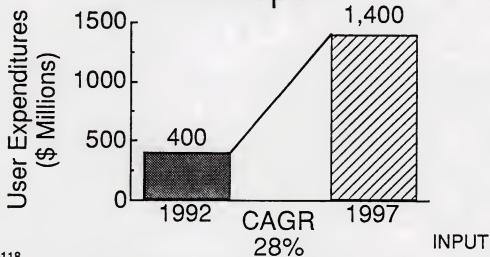
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Notes



Desktop (+Maintenance) in Europe



E-CS-118

Notes



Equipment Suppliers

Strengths	Weaknesses
<ul style="list-style-type: none">• Expertise• Large IBs• Financial• CS organisation	<ul style="list-style-type: none">- Product oriented- Resources- Channel contention- Slow to change- Not impartial

E-CS-119

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Notes



IMOs

Strengths

- PC expertise
- Incentive
- Independent

Weaknesses

- Financial
- Software skills
- Maintenance cultures

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Notes



Recommendations

- Strategic repositioning
- Acquire key skills
- Position migration

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Notes



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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 to meet the needs of older people, and the Health Service Research Unit (2000) has set out a strategy for the health care system to meet the needs of older people.

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