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Presentations

Paris
20 October 1992

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IT Spending Patterns Europe, 1992

- Changing user demands
- Impact on software and services vendors
- User spending expectations

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Notes

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Europe

Software and Services

Key user demands

- Value for money
- Cost reduction
- Effectiveness

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Notes

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Europe

Software and Services

Getting value for money from IT

- User ownership
- Benefits to business
- Productivity improvement
- Essential to infrastructure

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Europe

Software and Services

Seeking cost reduction for IT

- Downsizing
- Outsourcing
- 80% solutions

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Europe

Software and Services

Improving effectiveness from IT

- Business process re-engineering
- Simplification
- Speed of implementation
- Flexibility

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Notes

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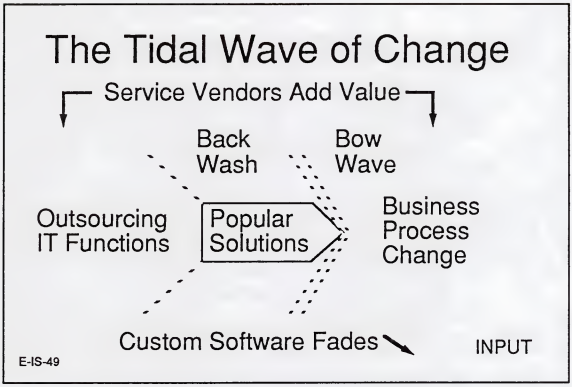

Notes

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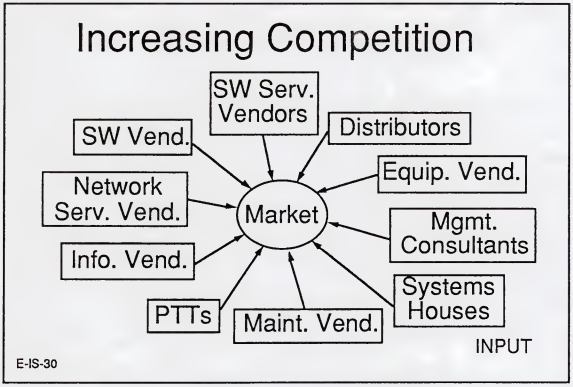

Notes

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Software and Services—Europe, 1991

Changing Market Shares

Vendor's Business	(Percent) 1981	1991
Professional Services	18	38
Management Consultancy	3	7
Software Products	9	13
Processing/Networks	31	3

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Software and Services—Europe, 1991

Changing Market Shares

Vendor's Business	(Percent) 1981	1991
Equipment Vendor	39	35
Maintenance	0	2
Distribution	0	1
Telecommunications	0	1

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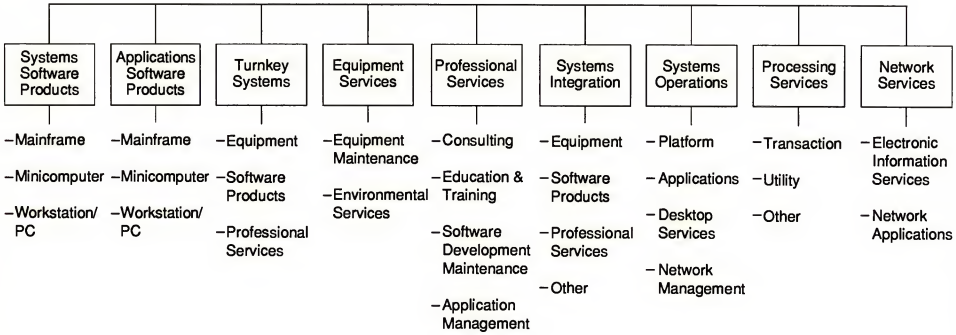
Information Services Industry Structure



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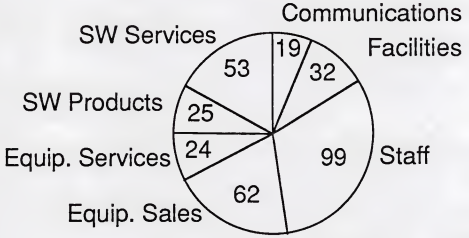
IT Spending—Europe, 1992

$ Billions



Total: 315, CAGR 5%

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Notes

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IT Spending—Europe, 1992

	CAGR (%)
Communications	8
Facilities	1
Staff	3
Equipment Sales	2
Equipment Services	3
Software Products	11
Software Services	11

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Notes

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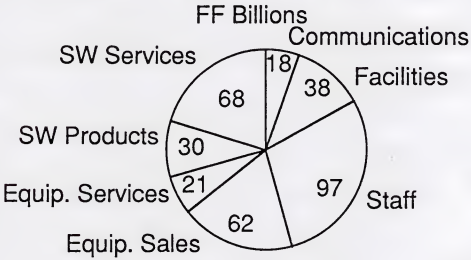
IT Spending—France, 1992



Total: 335, CAGR 4%

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Notes

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IT Spending—France, 1992

	CAGR (%)
Communications	6
Facilities	1
Staff	1
Equipment Sales	1
Equipment Services	2
Software Products	10
Software Services	11

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Notes

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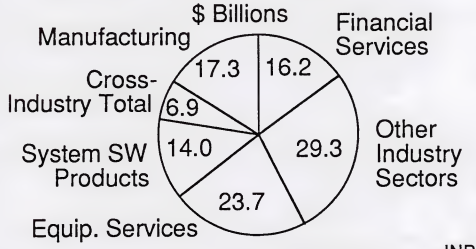
Information Services Spending—Europe, 1992



Total: 110, CAGR 9%

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Notes

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Information Services Spending—Europe, 1992

	CAGR (%)
Manufacturing	11
Financial Services	11
Other Industry Sectors	11
Equipment Services	3
System Software Products	7
Cross-Industry Total	12

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Notes

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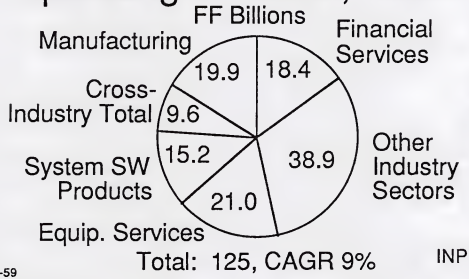
Information Services Spending—France, 1992



Total: 125, CAGR 9%

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Notes

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Information Services Spending—France, 1992

	CAGR (%)
Manufacturing	10
Financial Services	11
Other Industry Sectors	11
Equipment Services	2
System Software Products	7
Cross-Industry Total	13

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Notes

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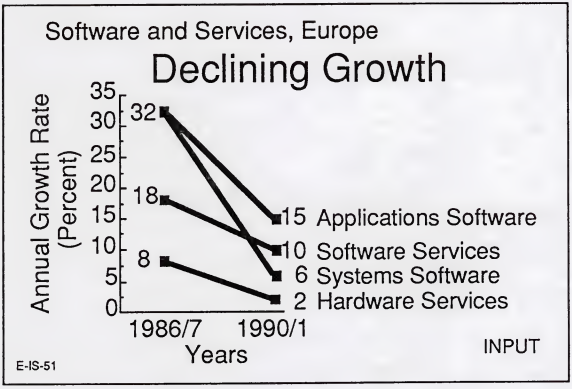

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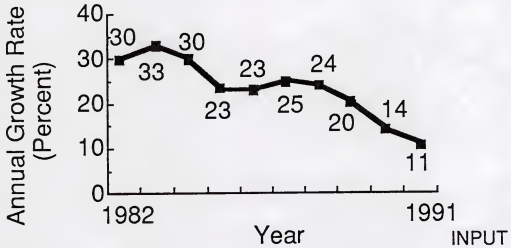
Software and Services, Europe

Average Growth in Spending



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