



INPUT
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

E-IS-52

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Europe

Software and Services

Key user demands

- Value for money
- Cost reduction
- Effectiveness

E-IS-43

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Notes



Europe

Software and Services

Getting value for money from IT

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

E-IS-44

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Europe

Software and Services

Seeking cost reduction for IT

- Downsizing
- Outsourcing
- 80% solutions

E-IS-45

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Europe

Software and Services

Improving effectiveness from IT

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

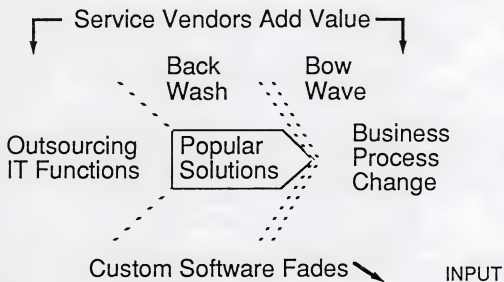
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The Tidal Wave of Change



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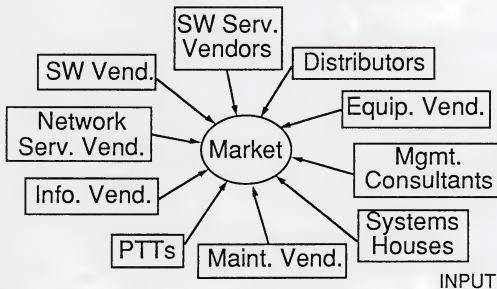
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Increasing Competition



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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

E-IS-47

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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

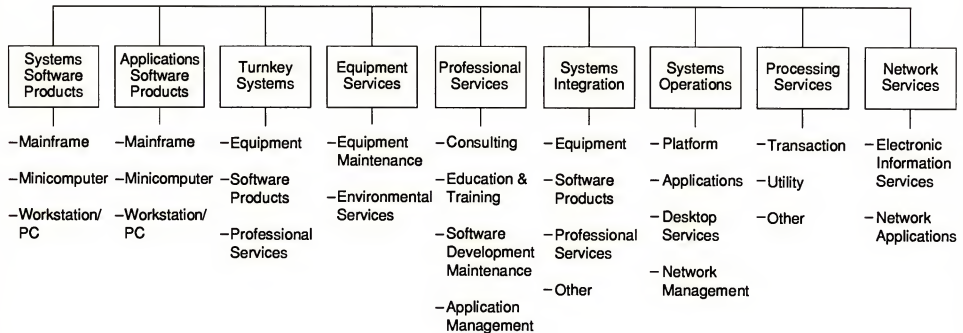
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Information Services Industry Structure



Source: INPUT

the 1990s, the number of people aged 65 and over in the United States is projected to increase from 20 million to 35 million.

As the population of the United States grows older, the number of people who are unable to perform the activities of daily living (ADL) will increase. ADLs are the basic activities that people need to do in order to live independently. These activities include walking, transferring, dressing, eating, grooming, and continence. People who are unable to perform these activities are often referred to as "frail" or "disabled." The number of people who are unable to perform ADLs is projected to increase from 10 million in 1990 to 20 million in 2010.

The increase in the number of people who are unable to perform ADLs is a major public health problem. People who are unable to perform ADLs are often dependent on others for help. This dependence can be a source of stress and frustration for both the person and the caregiver. In addition, people who are unable to perform ADLs are often at risk of being institutionalized in nursing homes. This is a costly and often undesirable outcome for both the person and the caregiver.

There are a number of factors that can contribute to a person's inability to perform ADLs. These factors include age, chronic illness, and disability. Age is a major risk factor for ADL disability. The number of people who are unable to perform ADLs increases with age. Chronic illness is another major risk factor. People with chronic illness are more likely to be unable to perform ADLs. Disability is also a major risk factor. People with a physical disability are more likely to be unable to perform ADLs.

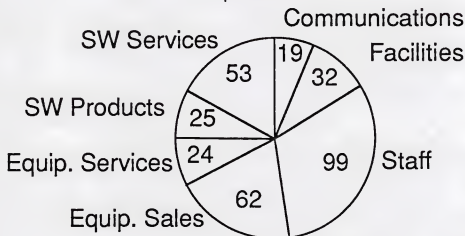
There are a number of strategies that can be used to help people who are unable to perform ADLs. These strategies include home care services, respite care, and assisted living facilities. Home care services provide help with ADLs in the person's own home. Respite care provides temporary relief for caregivers. Assisted living facilities provide a community-based setting for people who are unable to perform ADLs.

The goal of this study was to evaluate the effectiveness of a home care program in helping people who are unable to perform ADLs. The program provided help with ADLs in the person's own home. The program was evaluated using a randomized controlled trial design. The results of the study showed that the program was effective in helping people who are unable to perform ADLs. The program reduced the number of people who were unable to perform ADLs and reduced the number of people who were institutionalized in nursing homes.

The results of this study suggest that home care services are an effective way to help people who are unable to perform ADLs. Home care services can help people who are unable to perform ADLs to live independently in their own homes.

IT Spending—Europe, 1992

\$ Billions



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Total: 315, CAGR 5%

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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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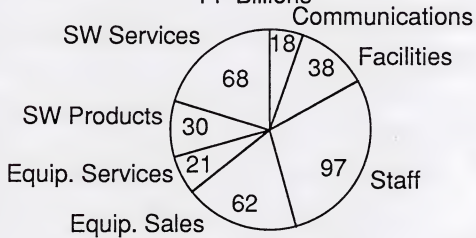
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IT Spending—France, 1992

FF Billions



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Total: 335, CAGR 4%

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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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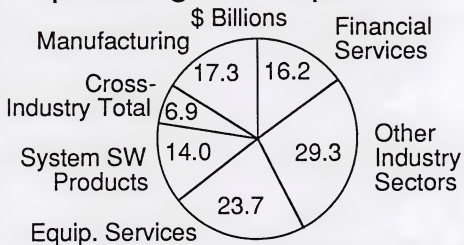
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Information Services Spending—Europe, 1992



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Total: 110, CAGR 9%

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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	INPUT

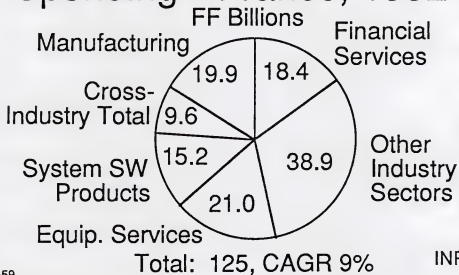
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Information Services Spending—France, 1992



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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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E-IS-60

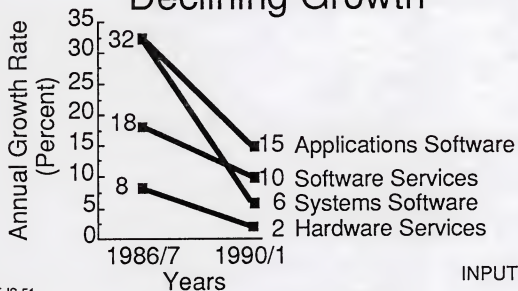
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Software and Services, Europe

Declining Growth



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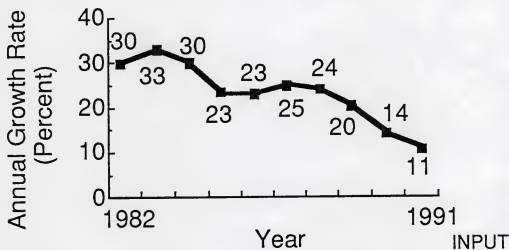
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Software and Services, Europe

Average Growth in Spending



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