

Customer Services Directions

Client Meeting
29 October 1993
London

INPUT



Customer Services Directions

Client Meeting
29 October 1993
London

INPUT
LIBRARY

INPUT[®]

London • Paris • Frankfurt • San Francisco • New York • Washington, D.C. • Tokyo

Prepared by
INPUT
17 Hill Street, Mayfair
London W1X 7FB
England

Customer Services Directions

INPUT exercises its best efforts in preparation of the information provided in this presentation and believes the information contained herein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.

Customer Services Directions

Client Meeting
29th October 1993
London

Customer Services Directions

Agenda

- Market signposts
- Environmental services
- Business services

CSP-PL- 2

INPUT

Notes

Market Forecast Customer Services Market, 1993-1998

- Open versus closed
- Competition
- Service types

CSP-PL- 3

INPUT

Notes

Customer Services United Kingdom

| | £ Billion | | CAGR (Percent) |
|-------------------------|-----------|------|-------------------|
| | 1993 | 1998 | |
| Proprietary (Closed) | 1.8 | 1.5 | -4 |
| Open (Potentially) | 1.4 | 2.2 | 9 |

CSP-PL- 4

INPUT

Notes

Trends in Open Services

- Actual versus potential
- Project management
- Effects of networking
- Third-party software
- Towards the desktop

CSP-PL- 5

INPUT

Notes

Customer Services United Kingdom

| | £ Billion | | CAGR (Percent) |
|-----------------|-----------|------|-------------------|
| | 1993 | 1998 | |
| Single-platform | 2.2 | 1.7 | -5 |
| Multi-platform | 1.0 | 2.0 | 15 |

CSP-PL- 6

INPUT

Notes

Software Support Trends

- Integration with hardware
- Applications grow in importance
- Response centre versus outsourcing
- Tools

CSP-PL- 7

INPUT

Notes

Customer Services United Kingdom

| | £ Billion | | CAGR (Percent) |
|----------------|-----------|------|-------------------|
| | 1993 | 1998 | |
| System Vendors | 1.8 | 2.0 | 3 |
| Other Vendors | 1.4 | 1.7 | 4 |

CSP-PL- 8

INPUT

Notes

Leading U.K. CS Vendors

| Revenues Vendor | 1992 (£ M) | | Rank | |
|--------------------|------------|-------|------|------|
| | CS | Other | 1992 | 1991 |
| ICL | 381 | 185 | 1 | 3 |
| Digital | 278 | 137 | 2 | 2 |
| IBM | 265 | 183 | 3 | 1 |
| HP | 122 | 7 | 4 | 4 |
| Unisys | 98 | 18 | 5 | 5 |

CSP-PL- 9

INPUT

Notes

Leading U.K. CS Vendors

| Revenues Vendor | 1992 (£ M) | | Rank | |
|--------------------|------------|-------|------|------|
| | CS | Other | 1992 | 1991 |
| Granada | 93 | 19 | 6 | 7 |
| Bull | 82 | 19 | 7 | 10 |
| AT&T/NCR | 67 | 40 | 8 | 8 |
| Olivetti | 53 | 8 | 9 | 9 |
| Prime (CV) | 46 | 21 | 10 | 6 |

CSP-PL- 10

INPUT

Notes

Types of Competition

- IMO's "time warp"
- Channels \longrightarrow Partners
- Independents on parallel course
- Building services

CSP-PL- 11

INPUT

Notes

Customer Services United Kingdom

| | £ Billion | | CAGR (Percent) |
|--|-----------|------|-------------------|
| | 1993 | 1998 | |
| Support Services - Operational | 2.0 | 2.2 | 1.9 |
| Implementation Services - Project based | 1.2 | 1.5 | 5.5 |

CSP-PL- 12

INPUT

Notes

Trends in Service Cultures

- Life cycle marketing needs project managers
- Reskilling selves and customers
- Support/Training synergy
- Projects \longrightarrow Contracts

CSP-PL- 13

INPUT

Notes

Customer Services United Kingdom

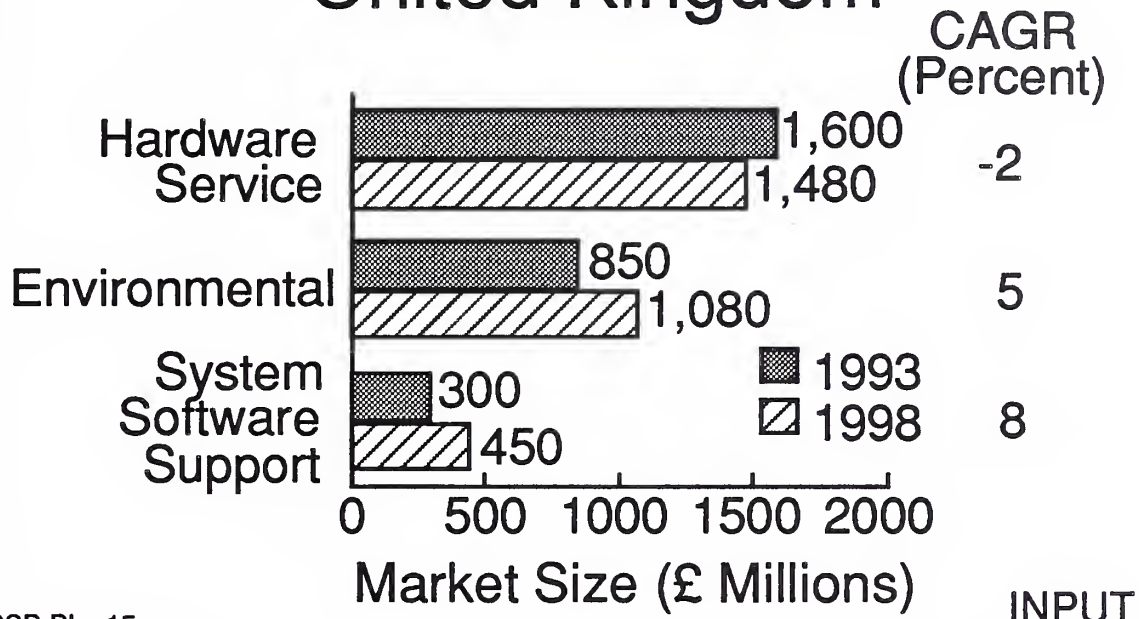
| Platform | £ Billion | | CAGR (Percent) |
|--------------------------|-----------|------|-------------------|
| | 1993 | 1998 | |
| Networks | 0.6 | 0.8 | 4 |
| PCs | 0.9 | 1.2 | 6 |
| Workstations/ Servers | 0.7 | 1.1 | 9 |
| Proprietary Hosts | 0.9 | 0.6 | -7 |
| Desktop Services | 0.2 | 0.4 | 22 |

CSP-PL- 14

INPUT

Notes

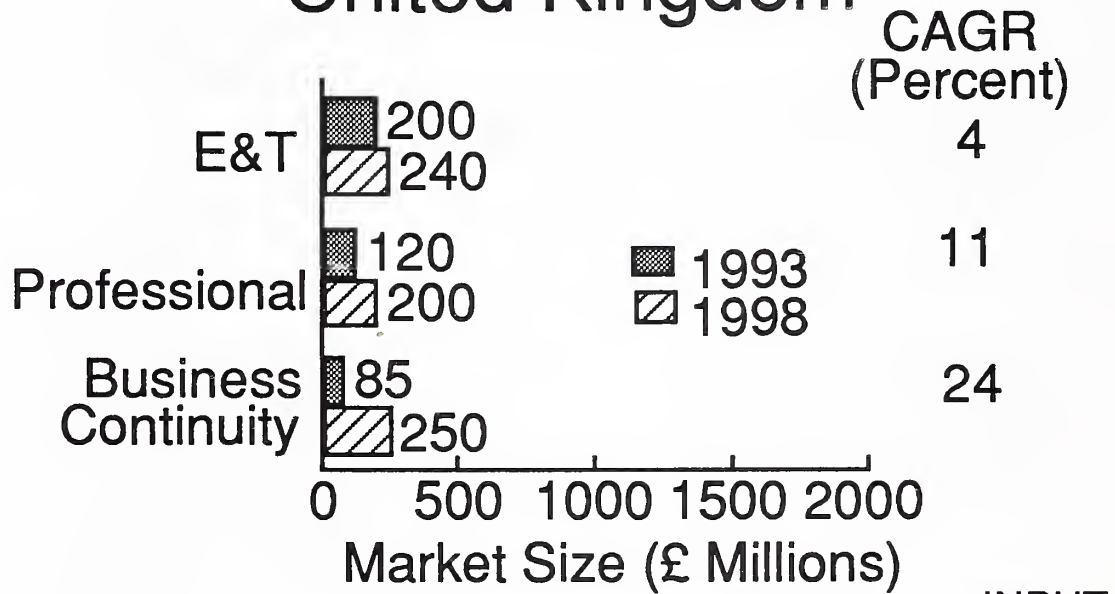
CS Sector Growth United Kingdom



CSP-PL- 15a

Notes

CS Sector Growth United Kingdom



CSP-PL- 15b

INPUT

Notes

Environmental Services

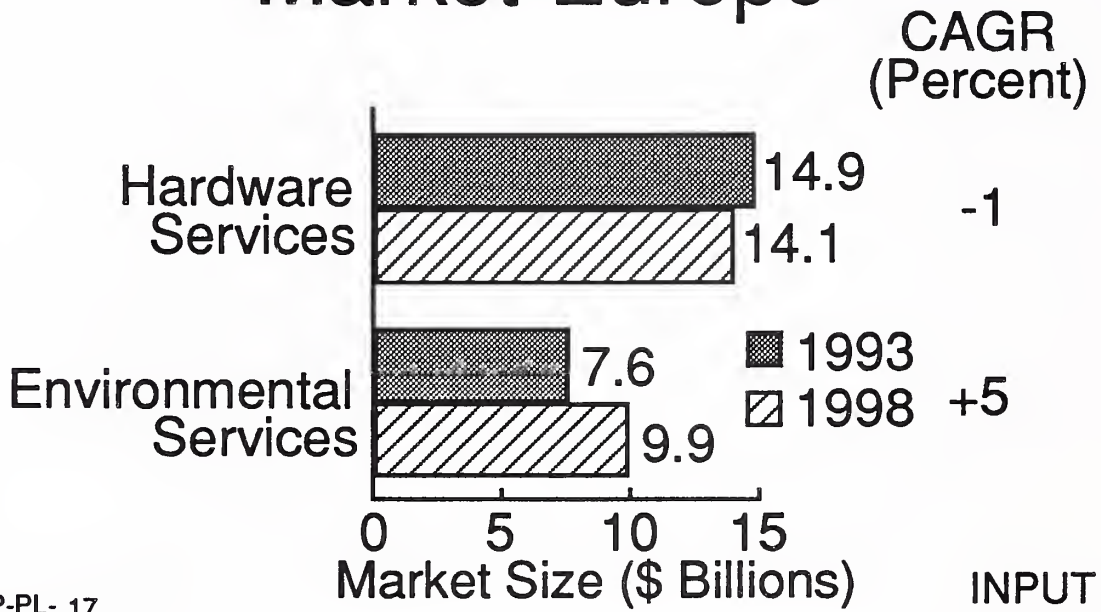
From Cabling to Premises Management

CSP-PL- 16

INPUT

Notes

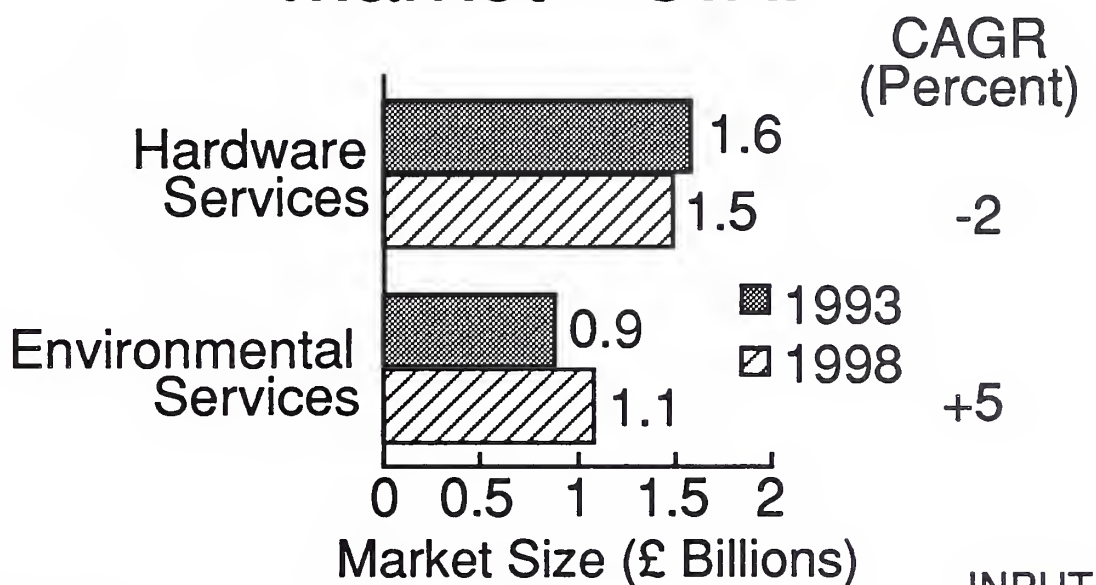
Customer Services Market-Europe



CSP-PL- 17

Notes

Customer Services Market—U.K.



CSP-PL- 18

INPUT

Notes

Market Segmentation

Non-Remedial Customer Services

Professional Services

Environmental Services

- Consultancy
- Design
- Project mgmt.

- Computer room
- Cabling
- Power/Light/etc.
- Installations

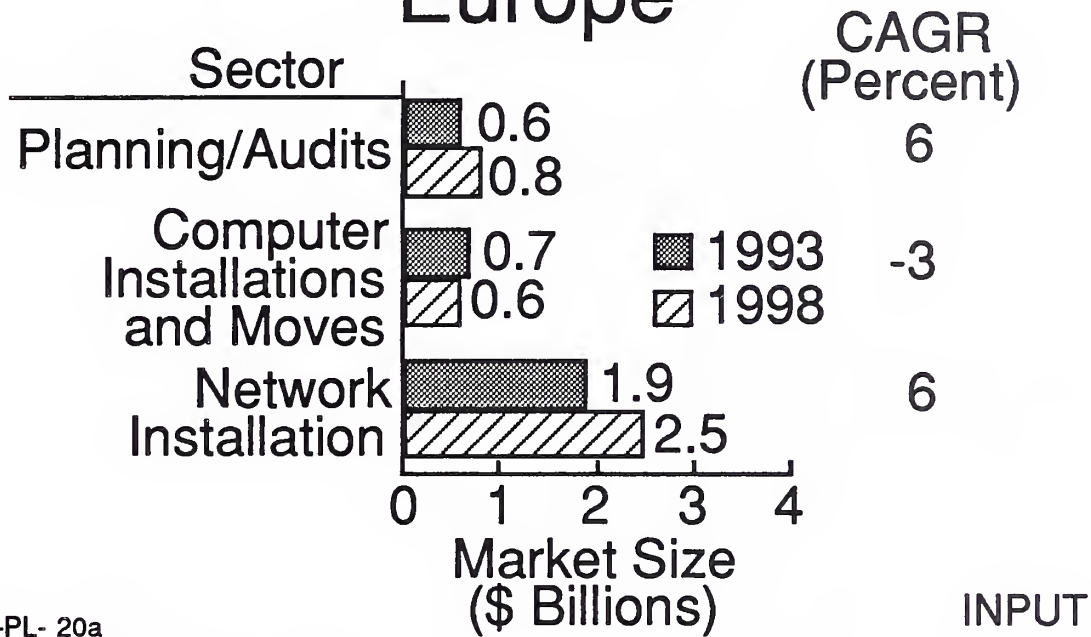
CSP-PL- 19

INPUT

Notes

- Environmental planning and audits
- Computer installations/de-installations/moves
- Network installations and upgrades
- Cabling services for voice, data and power
- Building integration services

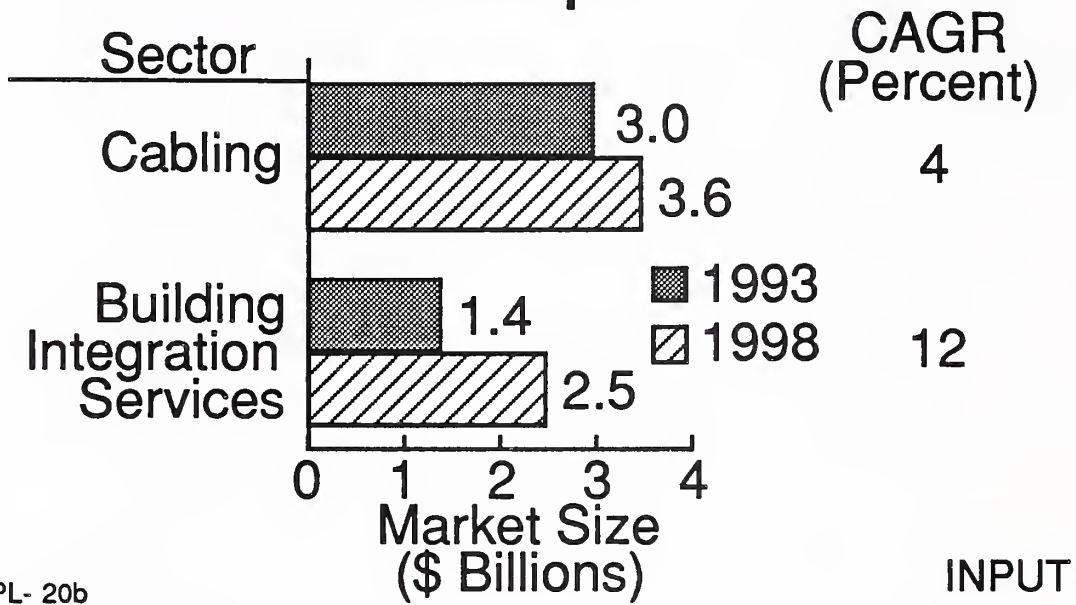
Environmental Services Europe



CSP-PL- 20a

Notes

Environmental Services Europe

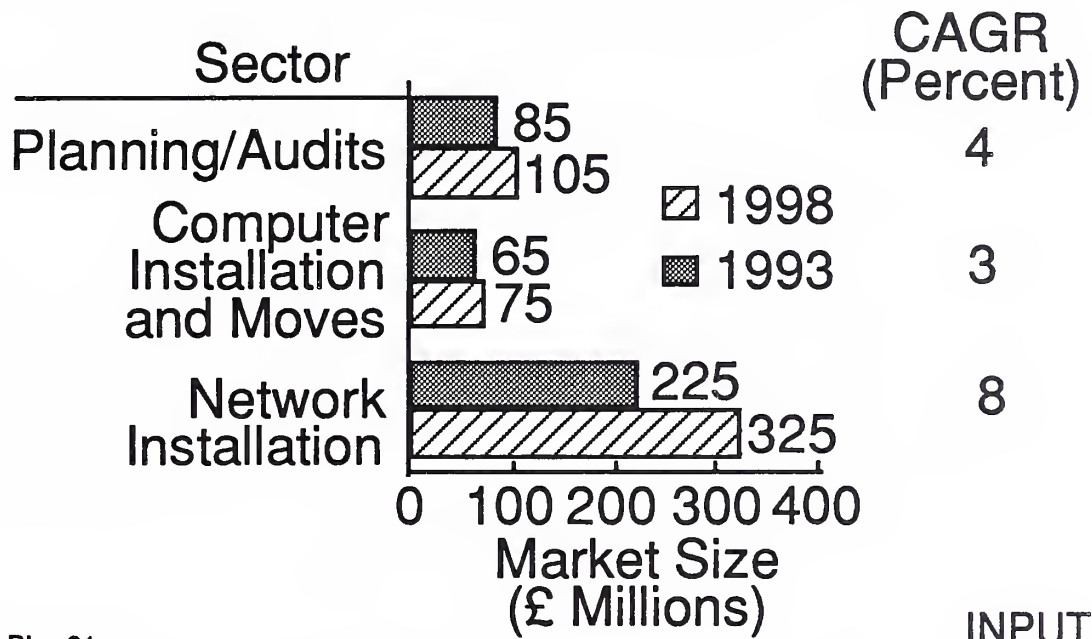


CSP-PL- 20b

INPUT

Notes

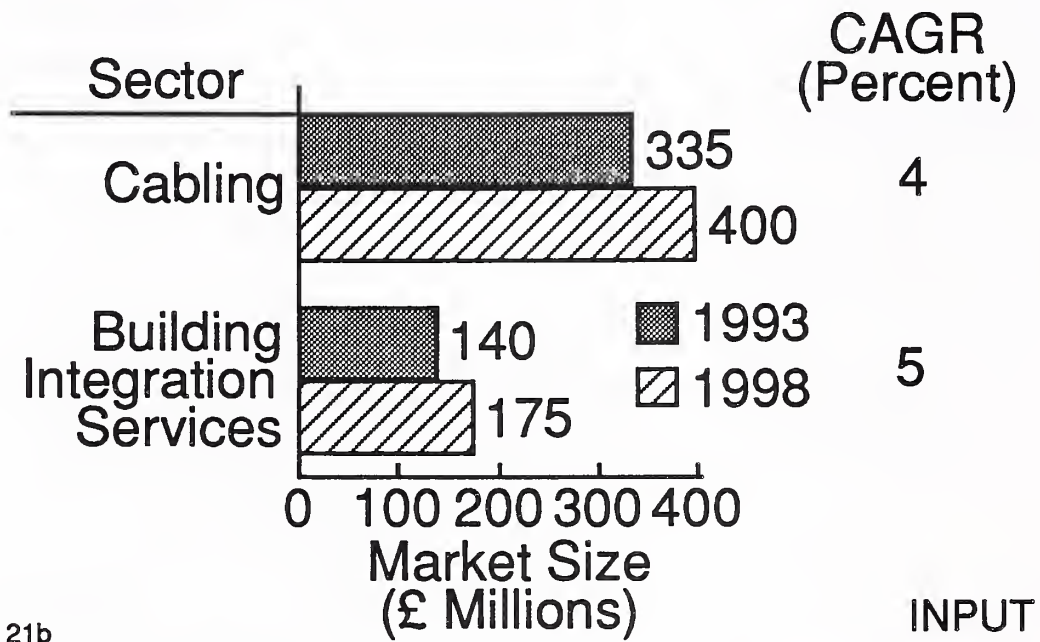
Environmental Services—U.K.



CSP-PL- 21a

Notes

Environmental Services—U.K.



CSP-PL- 21b

Notes

Environmental Services Competition

New Entrants

- Telecommunication vendors

Suppliers

- Electrical contractors
- HVAC engineers

Industry Competitors

- Building & construction firms

Buyers

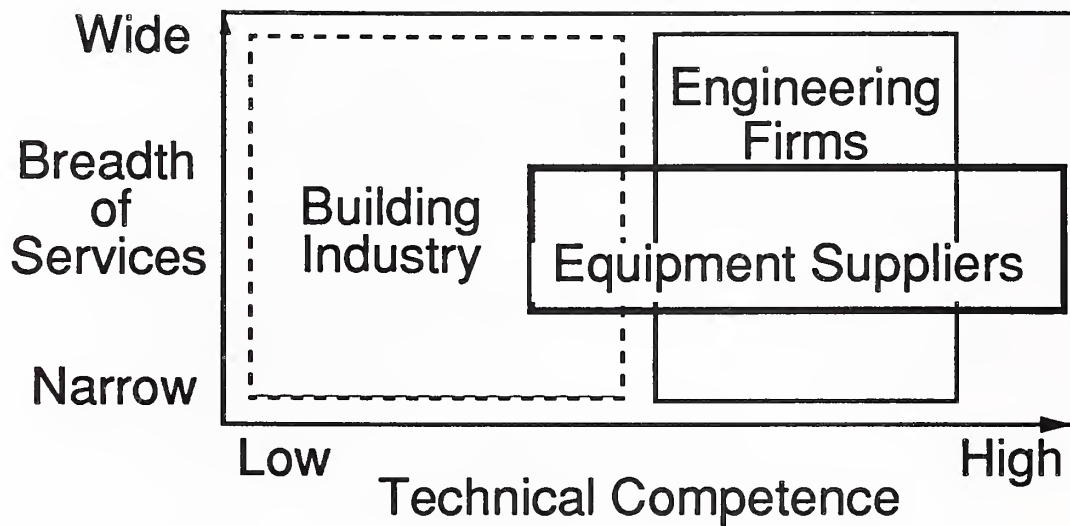
- Property services
- Outsourcing vendors

CSP-PL- 22

INPUT

Notes

Vendor Positioning



CSP-PL- 23

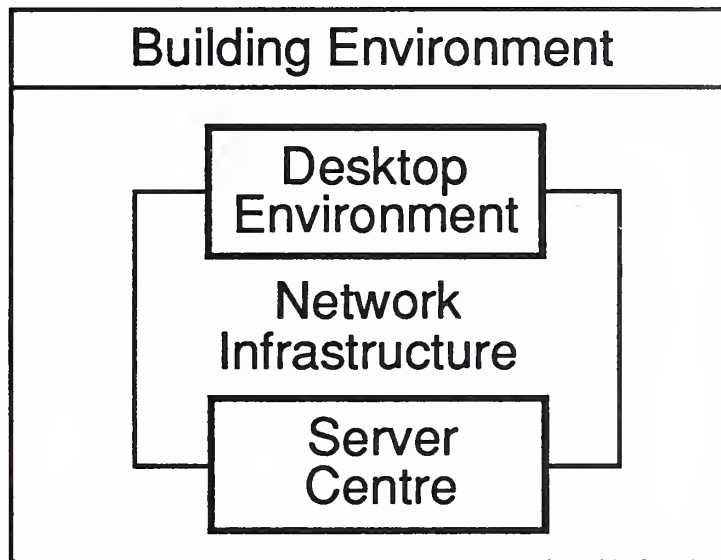
INPUT

Notes

Leading European Vendors

| Vendor | Estimated Sector Revenues (\$M) | Market Share (Percent) |
|-----------|---------------------------------|------------------------|
| IBM | 320 | 4.4 |
| Digital | 225 | 3.1 |
| Unisys | 130 | 1.8 |
| Bull | 105 | 1.5 |
| SNI | 95 | 1.3 |
| ICL | 75 | 1.0 |
| Honeywell | 65 | 0.9 |
| HP | 60 | 0.8 |
| Olivetti | 50 | 0.7 |
| Getronics | 40 | 0.6 |

Facilities Services

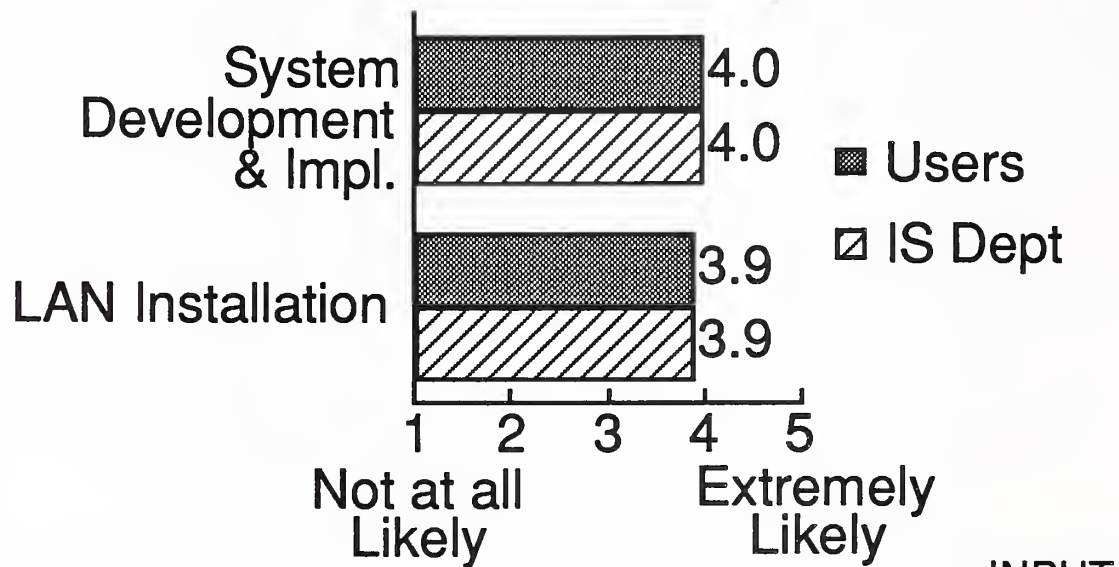


CSP-PL- 24

INPUT

Notes

Principal Services Required Customer Perception

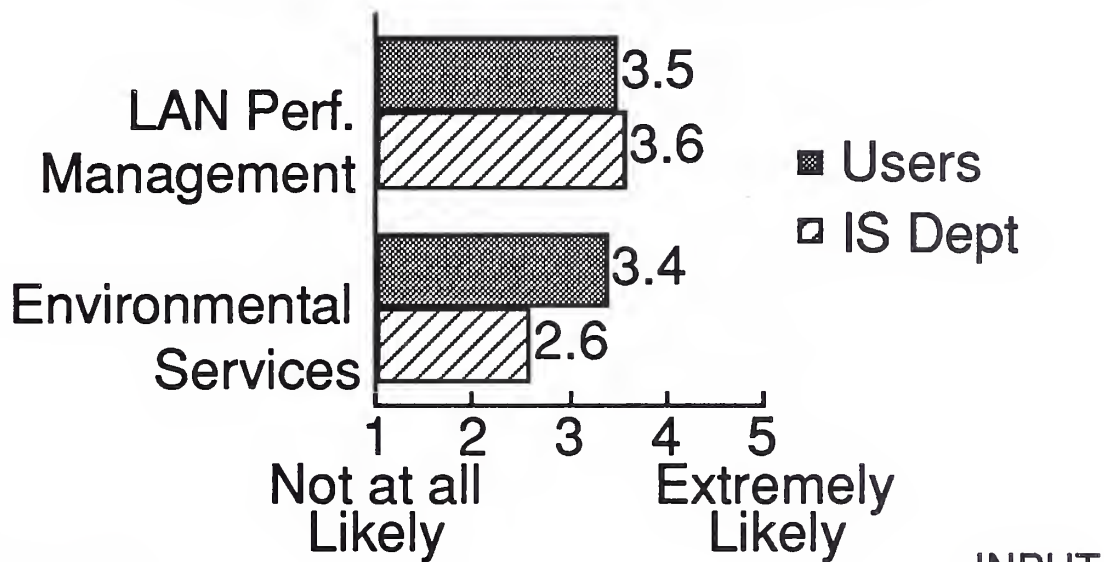


CSP-PL- 25a

INPUT

Notes

Principal Services Required Customer Perception

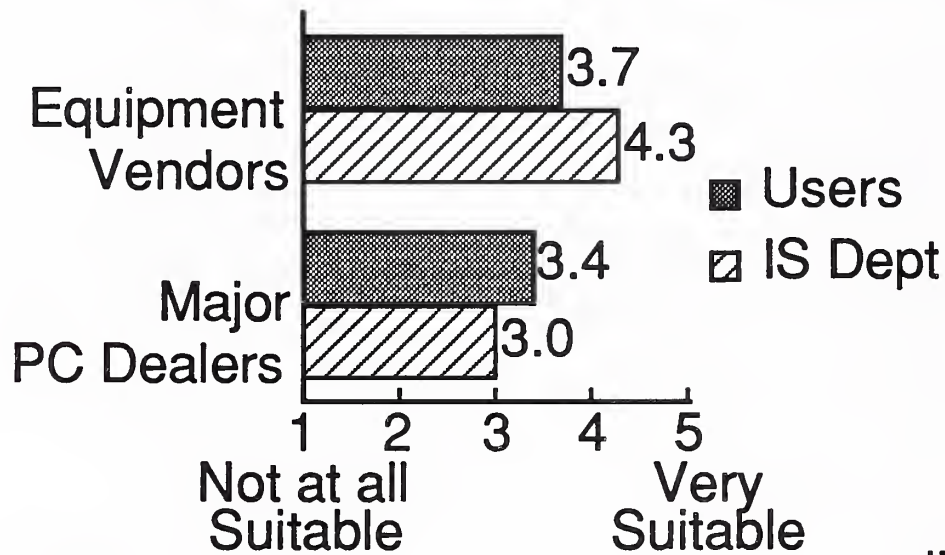


CSP-PL- 25b

INPUT

Notes

Vendor Suitability Customer Perception

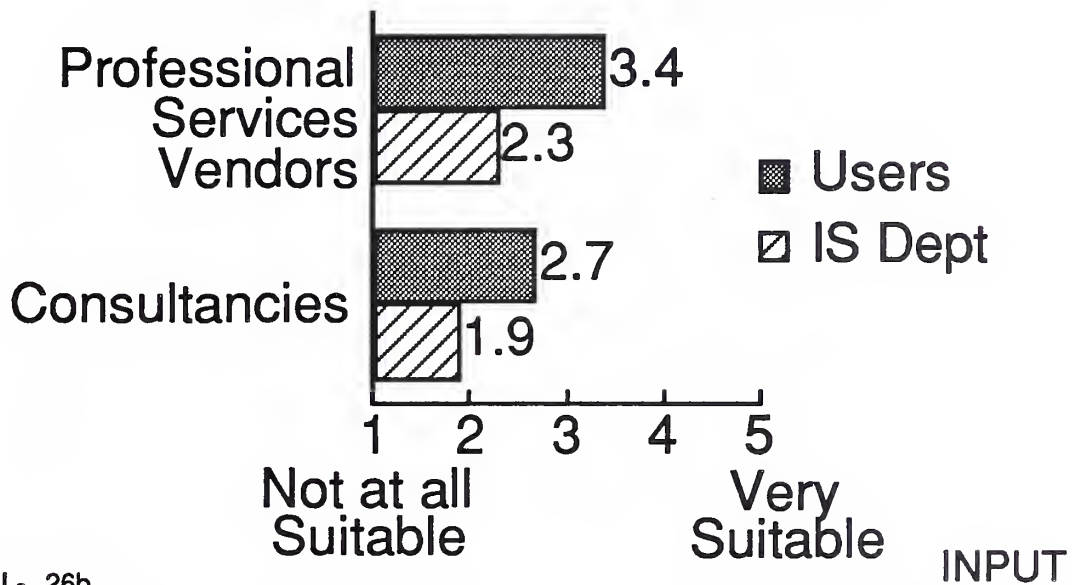


CSP-PL- 26a

INPUT

Notes

Vendor Suitability Customer Perception



CSP-PL- 26b

Notes

Business Services

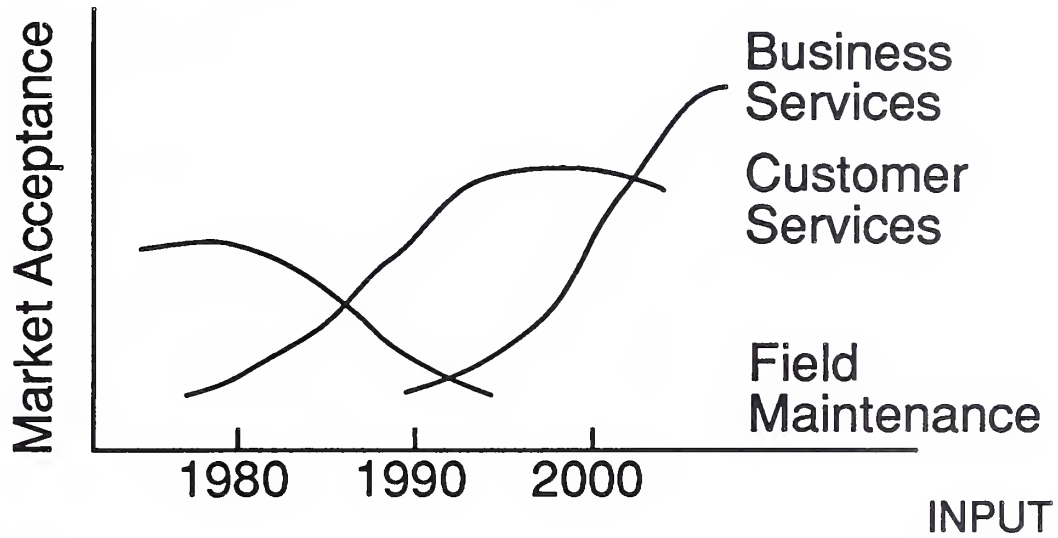
A New Direction for Customer Services

INPUT

CSP-PL-27

Notes

Customer Services Market Waves



CSP-PL-28

Notes

Defining the Business Services Opportunity

| | | |
|------------|--------------------|---------------------|
| Projects | SI | BIS |
| Operations | Systems Operations | Business Operations |
| | IT | Non-IT |

INPUT

CSP-PL-29

Notes

New Competitors

- BET FM
- Select FM
- P&O Total FM (Granada)
- Serco

INPUT

CSP-PL- 30

Notes

Other Competitive Firms

- Symonds FM
- Drake & Scull Technical Services
- MJN FM (Staveley Industries)
- Facilities & Property Management PLC
- IFM Co
- Procord (IBM buy out)
- Haden FM LTD.
- Airwork
- Thorn
- Hunting Engineering
- DASA
- Ciset
- Thomson

10/29/93

Serco

- Offering a comprehensive range of services within one contract
- IAL acquired April 1992
- £150 million annual revenue (1992)
- 6,000 plus staff

INPUT

CSP-PL-31

Notes

Serco

- Facilities management (51%)
- Operation and maintenance (20%)
- System engineering (18%)
- Project management support (11%)

INPUT

CSP-PL-32

Notes

Business Services Positioning

Projects

Operations

| | |
|--|--|
| | |
| | |

Lo-Tech

High-Tech

INPUT

CSP-PL-33

Notes

Conclusions

- Strategic issue
 - Product support service or system support service
- Environmental services a step towards business services

INPUT

CSP-PL- 34

Notes

Clients make informed decisions more quickly and economically by using INPUT's services. Since 1974, information technology (IT) users and vendors throughout the world have relied on INPUT for data, research, objective analysis and insightful opinions to prepare their plans, market assessments and business directions, particularly in computer software and services.

Contact us today to learn how your company can use INPUT's knowledge and experience to grow and profit in the revolutionary IT world of the 1990s.

SUBSCRIPTION SERVICES

- **Information Services Markets**
 - Worldwide and country data
 - Vertical industry analysis
- **Systems Integration and Business Process Change**
- **Client/Server Applications and Directions**
- **IT Outsourcing Opportunities**
- **Information Services Vendor Profiles and Analysis**
- **EDI/Electronic Commerce**
- **U.S. Federal Government IT Markets**
- **IT Customer Services Directions**
- **Interactive Communications Services**
- **Multimedia Opportunities**

SERVICE FEATURES

Research-based reports on trends, etc.
(Over 100 in-depth reports a year)
Frequent bulletins on events, issues, etc.
5-year market forecasts
Competitive analysis
Access to experienced consultants
Immediate answers to questions

DATABASES

- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
 - Procurement Plans (PAR)
 - Forecasts
 - Awards (FAIT)
- **Commercial Application LEADS**

CUSTOM PROJECTS

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

OTHER SERVICES

Presentations to user groups, planning meetings, etc.

Acquisition/partnership searches

Newsletters

INPUT WORLDWIDE

Frankfurt
Sudetenstraße 9
D-35428 Langgöns-
Niederkleen
Germany
Tel. +49 (0) 6447-7229
Fax +49 (0) 6447-7327

London
17 Hill Street
London W1X 7FB
England
Tel. +44 (0) 71 493-9335
Fax +44 (0) 71 629-0179

New York
400 Frank W. Burr Blvd.
Teaneck, NJ 07666
U.S.A.
Tel. 1 (201) 801-0050
Fax 1 (201) 801-0441

Paris
24, avenue du Recteur
Poincaré
75016 Paris
France
Tel. +33 (1) 46 47 65 65
Fax +33 (1) 46 47 69 50

San Francisco
1881 Landings Drive
Mountain View
CA 94043-0848
U.S.A.
Tel. 1 (415) 961-3300
Fax 1 (415) 961-3966

Tokyo
Saida Building, 4-6,
Kanda Sakuma-cho
Chiyoda-ku, Tokyo 101
Japan
Tel. +81 3 3864-0531
Fax +81 3 3864-4114

Washington, D.C.
1953 Gallows Road
Suite 560
Vienna, VA 22182
U.S.A.
Tel. 1 (703) 847-6870
Fax 1 (703) 847-6872

