

Systems Integration—
European Vendor Challenges

October 5, 1993

INPUT



Systems Integration—
European Vendor Challenges

October 5, 1993

INPUT
LIBRARY

INPUT®

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

Prepared by
INPUT
1881 Landings Drive
Mountain View, CA 94043-0848
U.S.A.

Systems Integration—European Vendor Challenges

Copyright © 1993 by INPUT. All rights reserved.
No part of this publication may be reproduced or distributed in any form, or by any means, or stored in a data base or retrieval system, without the prior written permission of the publisher.

The information provided in this publication shall be used only by the employees of and within the current corporate structure of INPUT's clients, and will not be disclosed to any other organization or person including parent, subsidiary, or affiliated organization without prior written consent of INPUT.

INPUT exercises its best efforts in preparation of the information provided in this publication 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.

Systems Integration— European Vendor Challenges

IEU/SIP-PL-I- 1

INPUT

Notes

The Computer Industry in the 1990s

Technology Revolutions
+
Organisational Evolutions
=
All the rules have changed

IS-86

INPUT

Notes

Networking Revolution

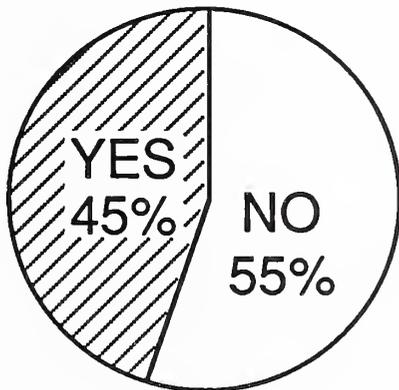
- Technology enabled
 - Bandwidth
 - Coverage
 - Mode (Digital)
- Driven by organisation need
 - Connectivity
 - Electronic commerce

IEU/SIP-PL-I- 3

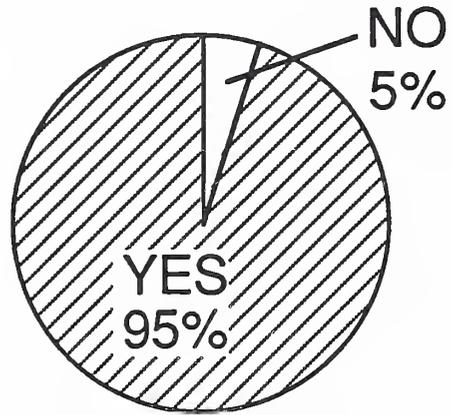
INPUT

Notes

European Client/Server Implementation Plans



Currently implementing



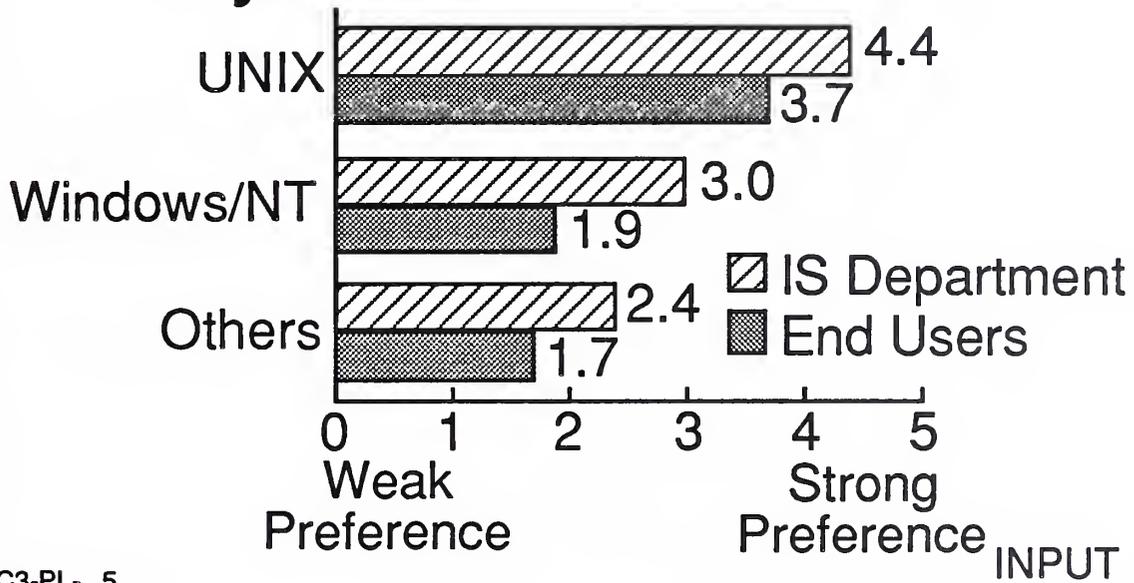
Within next 2 years

INPUT

MC3-PL- 4

Notes

European Operating System Preferences

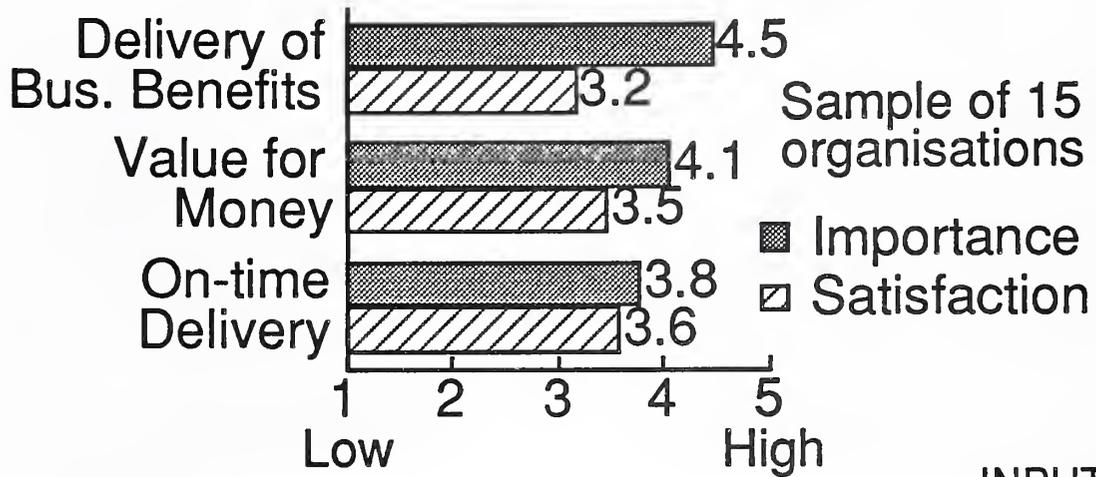


MC3-PL- 5

Notes

Systems Integration

Achievement of Project Objectives

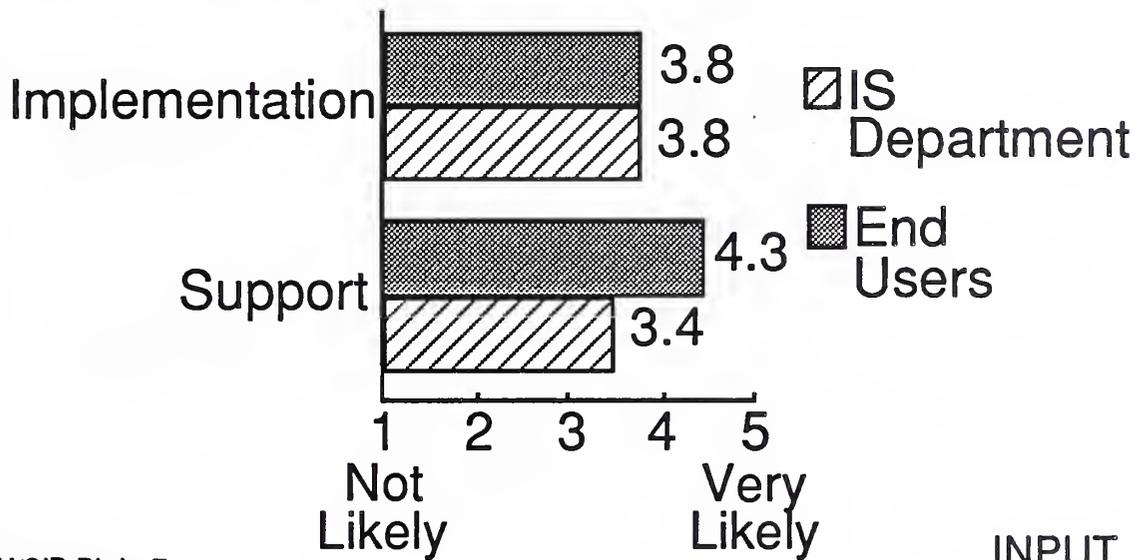


IEU/SIP-PL-I- 6

INPUT

Notes

European User Need for Client/Server Services

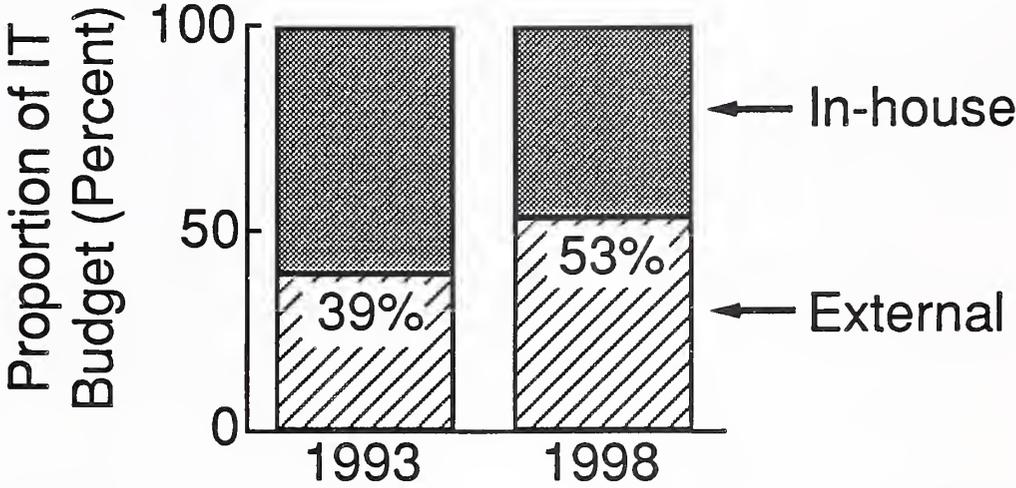


IEU/SIP-PL-I- 7

INPUT

Notes

European IT Spending Changes

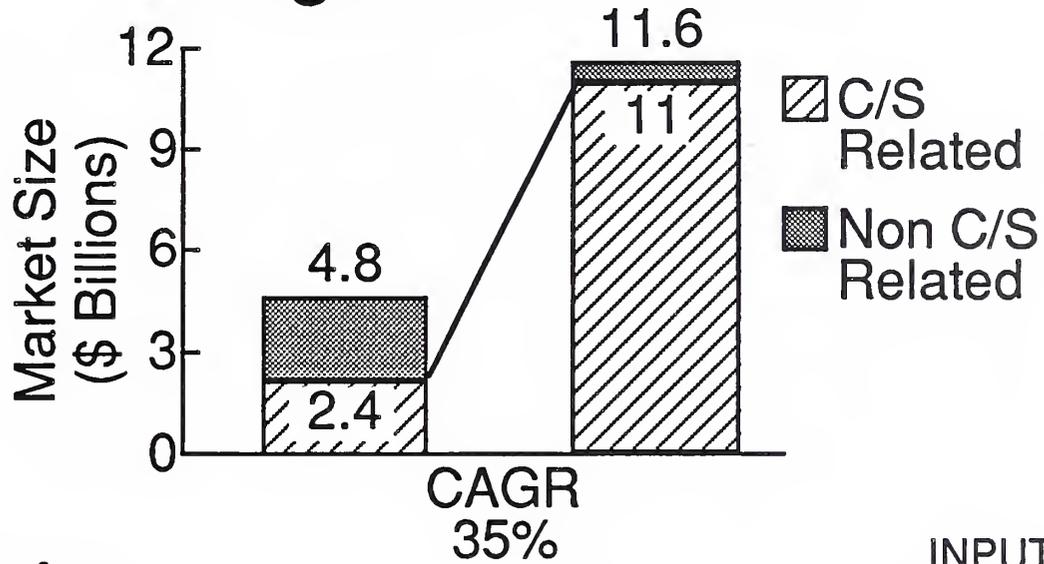


MC3-PL- 8

INPUT

Notes

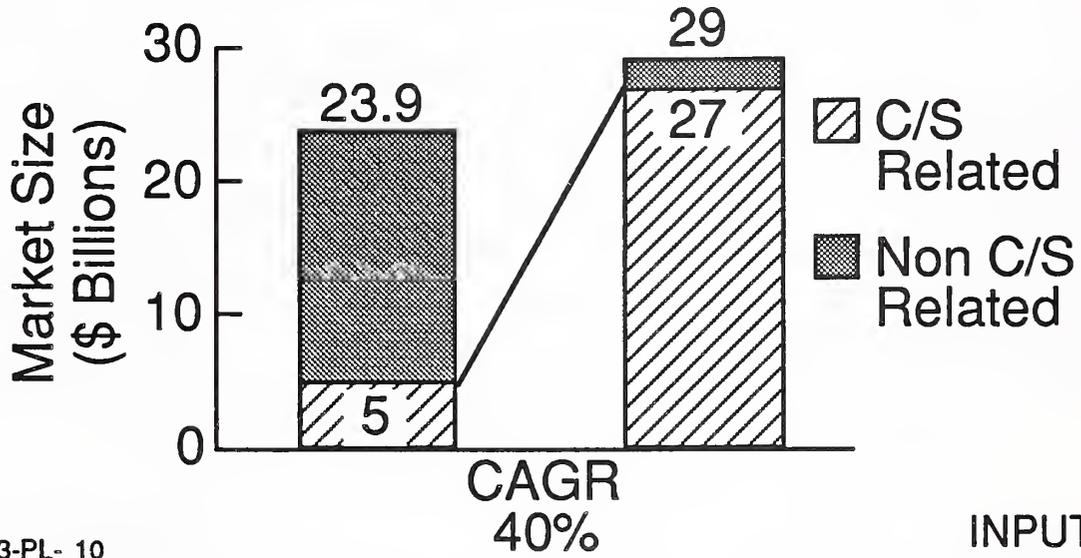
European Systems Integration Market



MC3-PL- 9

Notes

European Professional Services Market



MC3-PL- 10

Notes

Industry Structure and IS Revolution

Operations	
Solutions	
"Old" IS	"New" IS
Packaging	Packaging
Technology	Technology

Successful segments

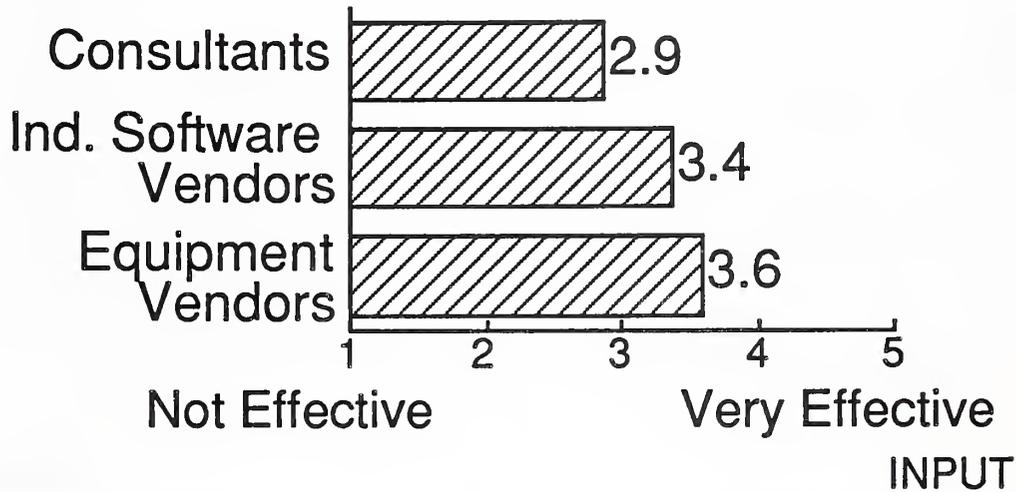
IS-77

INPUT

Notes

Systems Integration

Ability to Manage Projects User Perspective, U.K.



E-SI-154

Notes

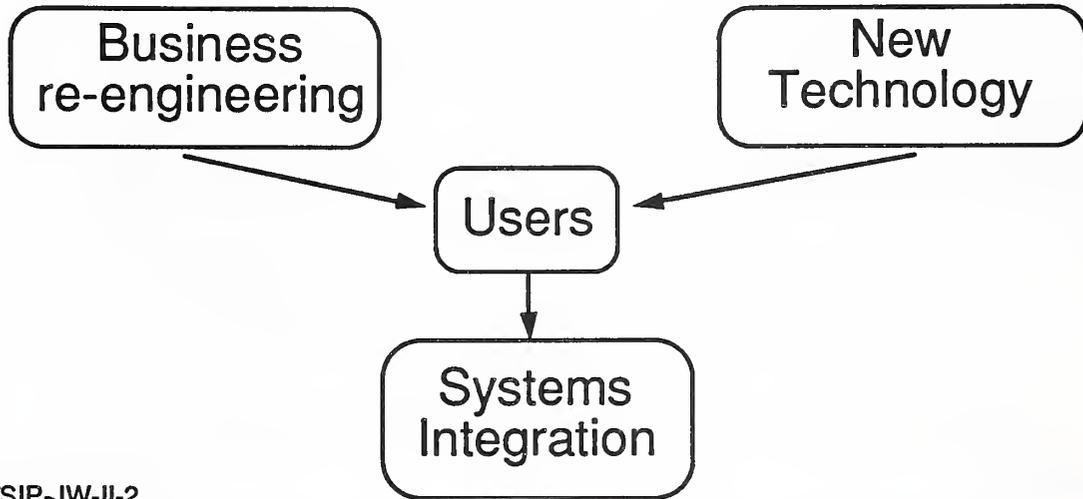
U.K. Systems Integration Market Opportunity

IEU/SIP-JW-II- 1

INPUT

Notes

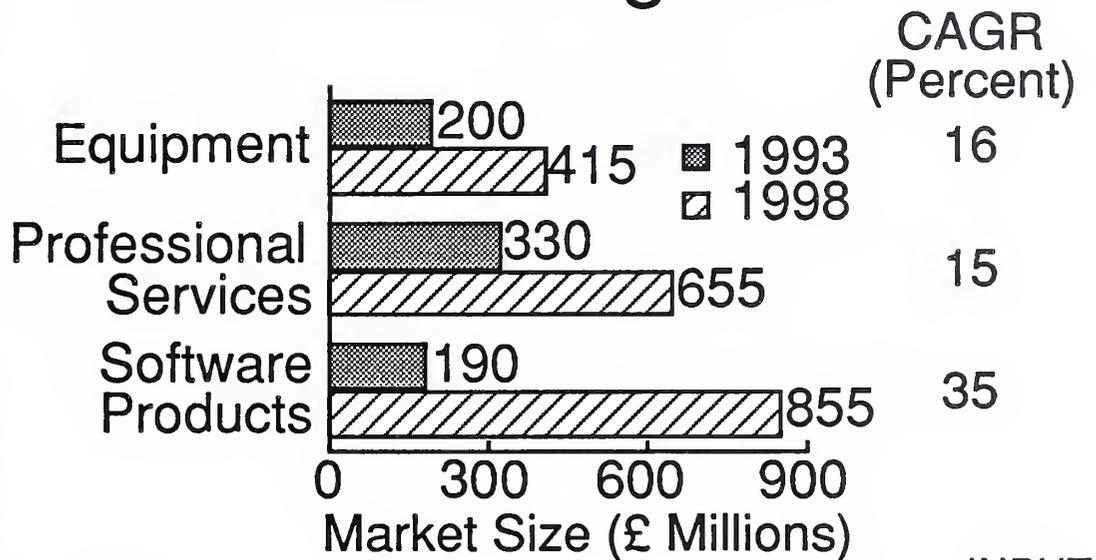
Driving Forces, Systems Integration, United Kingdom



IEU/SIP-JW-II-2

Notes

Systems Integration Market United Kingdom



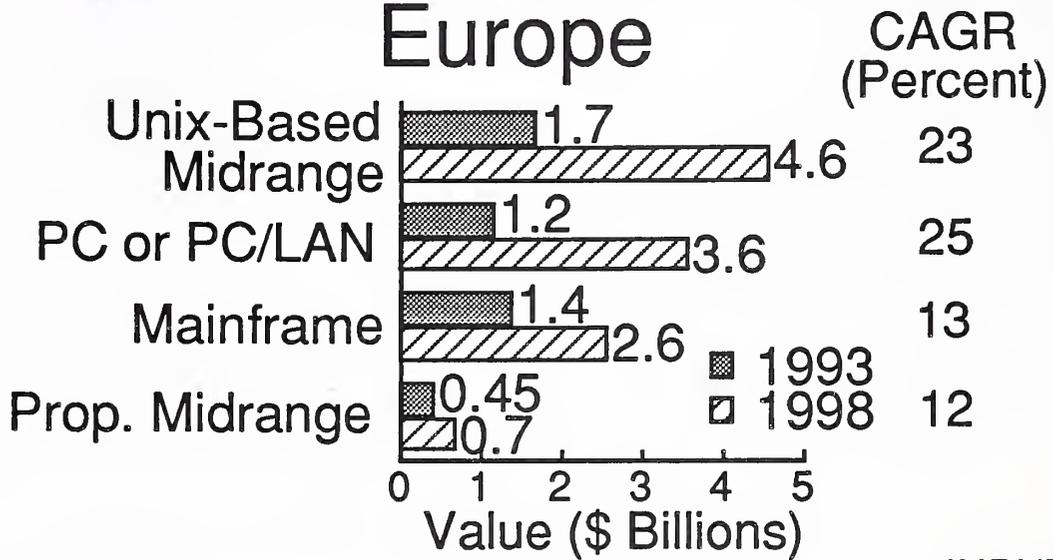
IEU/SIP-JW-II- 3

INPUT

Notes

Systems Integration

Projects by Equipment Type Europe

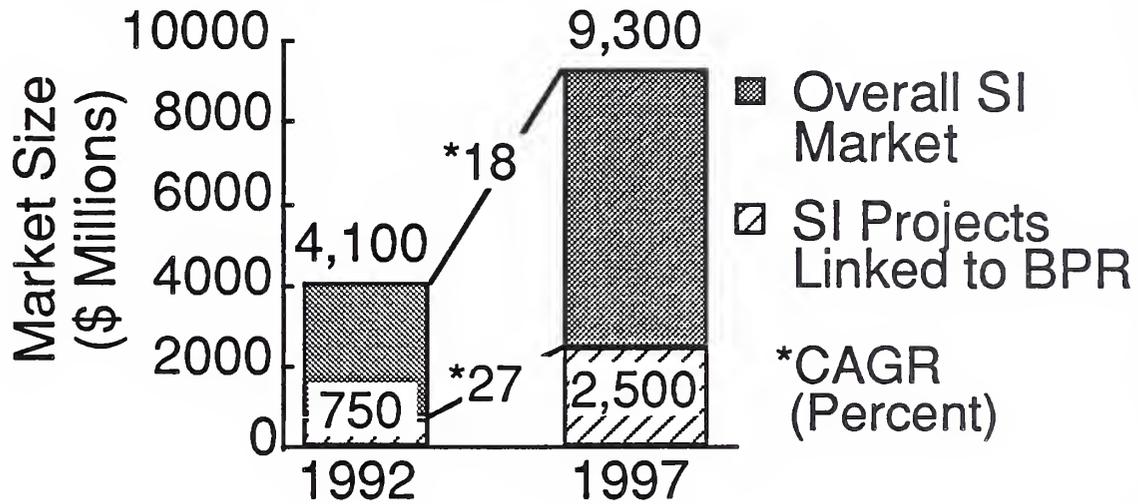


E-SI-161

INPUT

Notes

Business Process Re-engineering and the SI Market



SEIC2-II-8

Notes

Industry Growth Systems Integration, United Kingdom

- High Growth
 - Transportation and distribution
 - Telecommunications and utilities
- Low Growth
 - Manufacturing
 - Financial services

IEU/SIP-JW-II- 6

INPUT

Notes

Vendor Positioning

Business Consultant		
Technologist		
	Mainframe	C/S

IEU/SIP-JW-II- 7

INPUT

Notes

European Opportunities in Client/Server Project Services

IEU/SIP-JW-III- 1

INPUT

Notes

Impact of Client/Server Technology

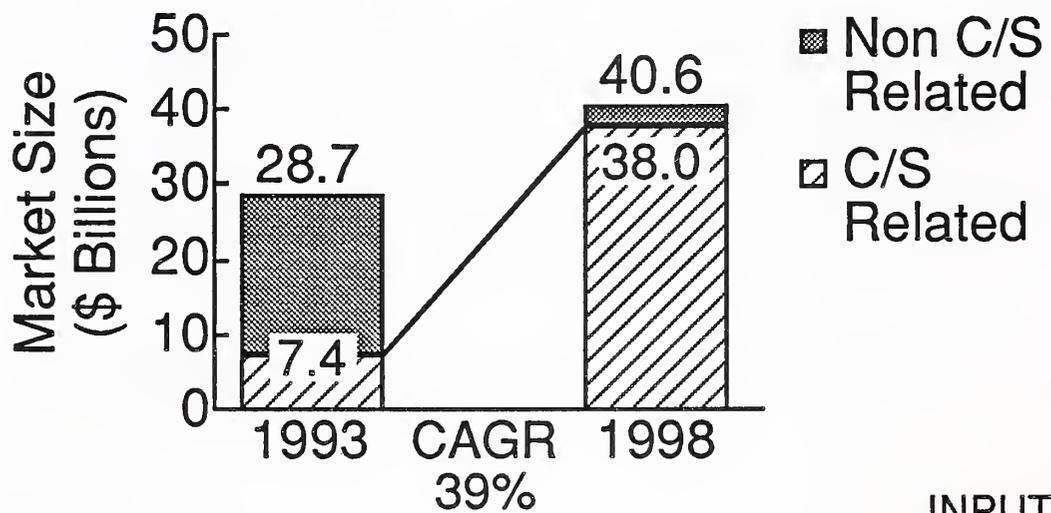
- Client/server technology fuels project services growth
- Integration services are a key requirement
- Level of competition will increase

IEU/SIP-JW-III- 2

INPUT

Notes

Client/Server Project Services Market Forecast

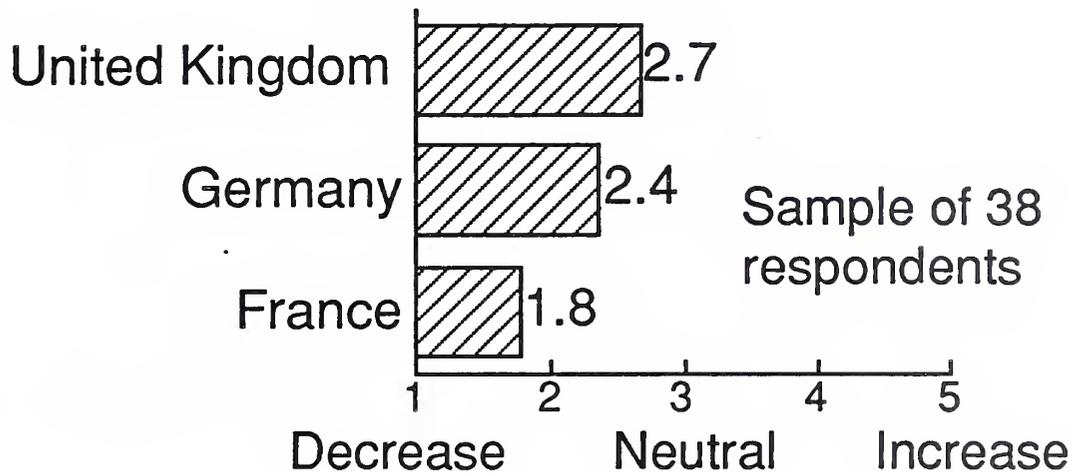


IEU/SIP-JW-III- 3

INPUT

Notes

Impact of C/S Technology on IS Expenditure



IEU/SIP-JW-III- 4

INPUT

Notes

Impact on Role of IS Department

- Influence on purchasing declines
- Need for retraining/external support
- Greater development productivity

IEU/SIP-JW-III- 5

INPUT

Notes

Service Requirements: United Kingdom

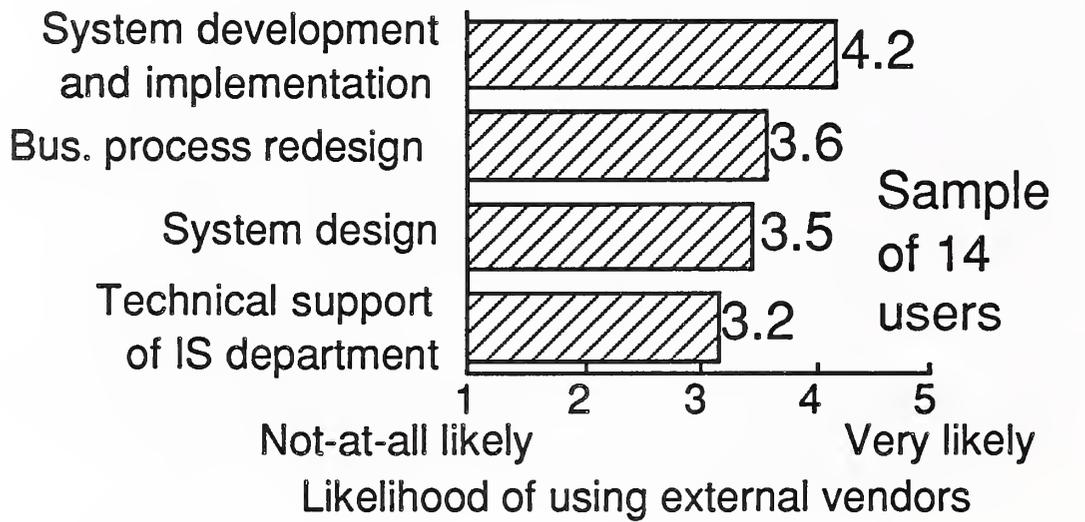
- IS departments require multi-vendor network design and implementation
- End users want application integration services
- Business process redesign is now a key requirement

IEU/SIP-JW-III- 6

INPUT

Notes

Principal Service Requirements United Kingdom

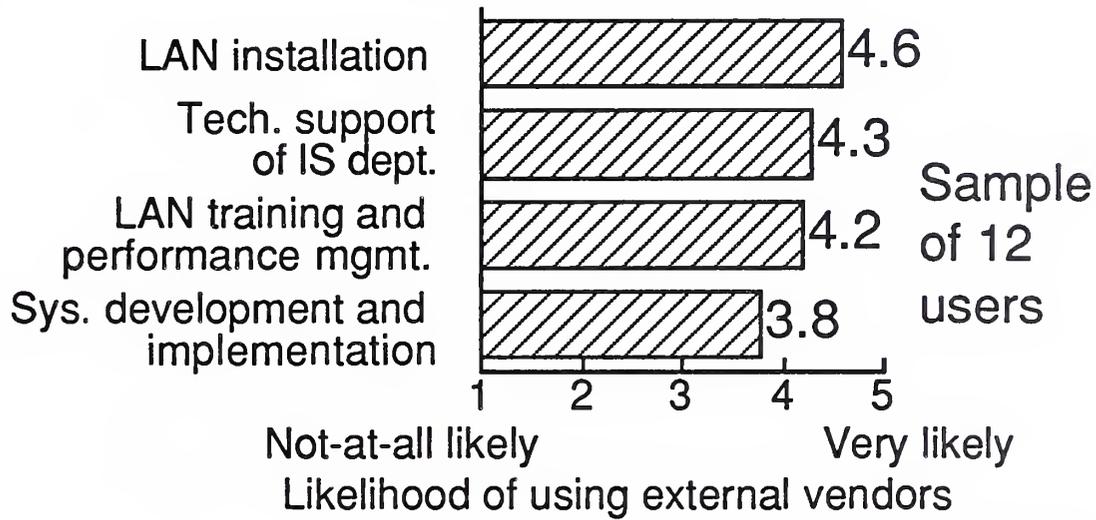


IEU/SIP-JW-III- 7

INPUT

Notes

Principal Service Requirements Germany

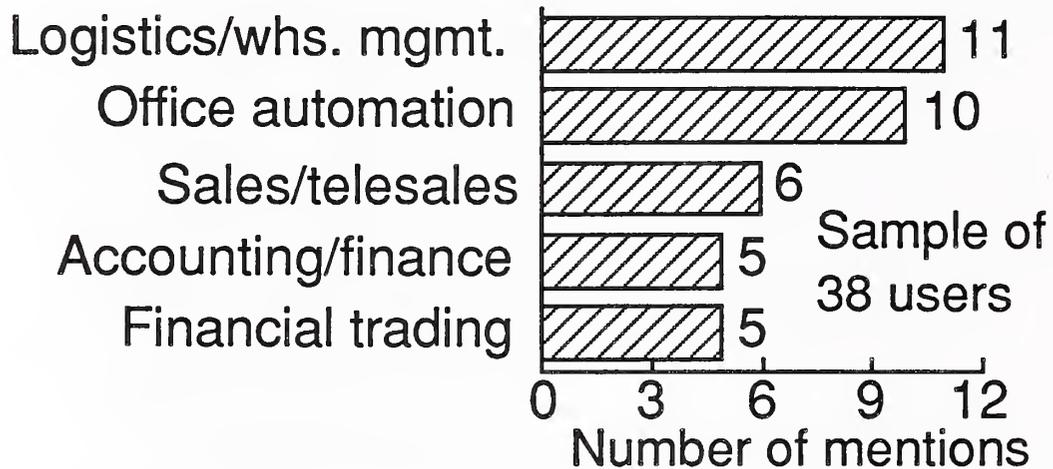


IEU/SIP-JW-III- 8

INPUT

Notes

Leading Applications in the Client/Server Environment



IEU/SIP-JW-III- 9

INPUT

Notes

Vendor Selection Criteria End Users

- Proven track record
- Competitively priced industry specific solutions
- Networking capability

IEU/SIP-JW-III- 10

INPUT

Notes

Perceived Vendor Suitability Europe



IEU/SIP-JW-III- 11

INPUT

Notes

The Computer Industry in 2001

- IS is a process, not an organisation
- Solutions and services are bought
- Services vendor role greatly enhanced
- Hardware role greatly diminished

IS-100

INPUT

Notes

Successful Vendors

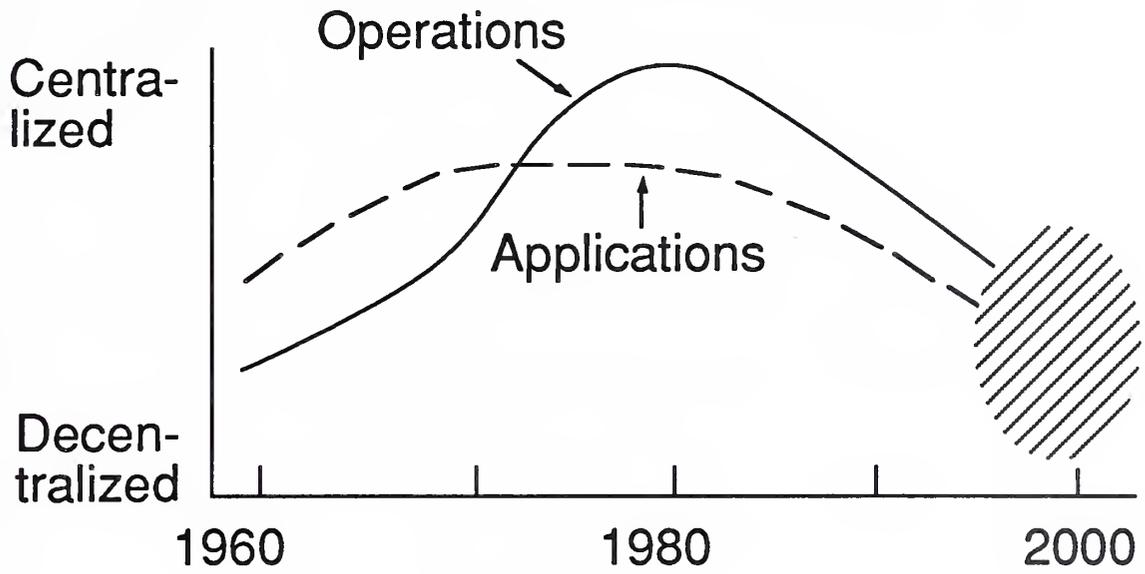
- Knowledge-based
- Network-based
- Low cost—continual improvement
- Low price—continual improvement

IEU/SIP-PL-IV- 2

INPUT

Notes

IT Trends



ACCOR 10/13-8

Notes

Competing in a Revolution

What used to work
doesn't work now!

IS-78

INPUT

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

