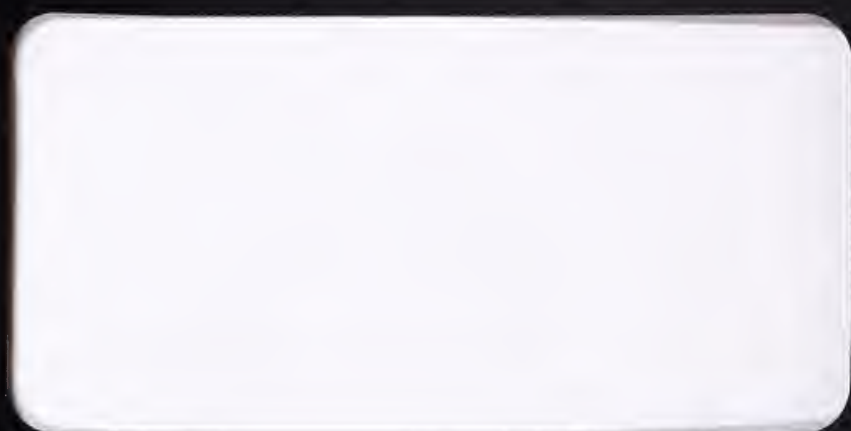


Systems Integration—  
European Vendor Challenges

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

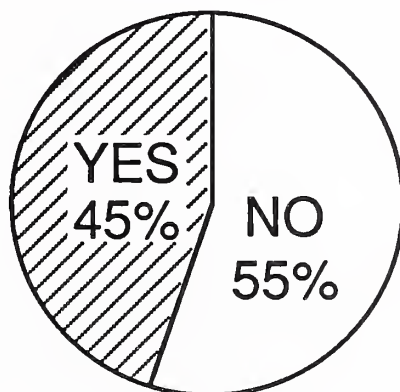
- Technology enabled
  - Bandwidth
  - Coverage
  - Mode (Digital)
- Driven by organisation need
  - Connectivity
  - Electronic commerce

IEU/SIP-PL-I- 3

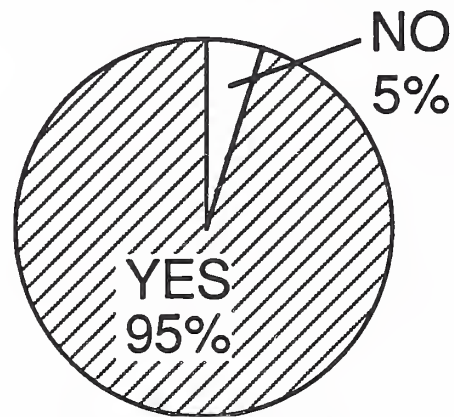
INPUT

Notes

# European Client/Server Implementation Plans



Currently  
implementing



Within next  
2 years

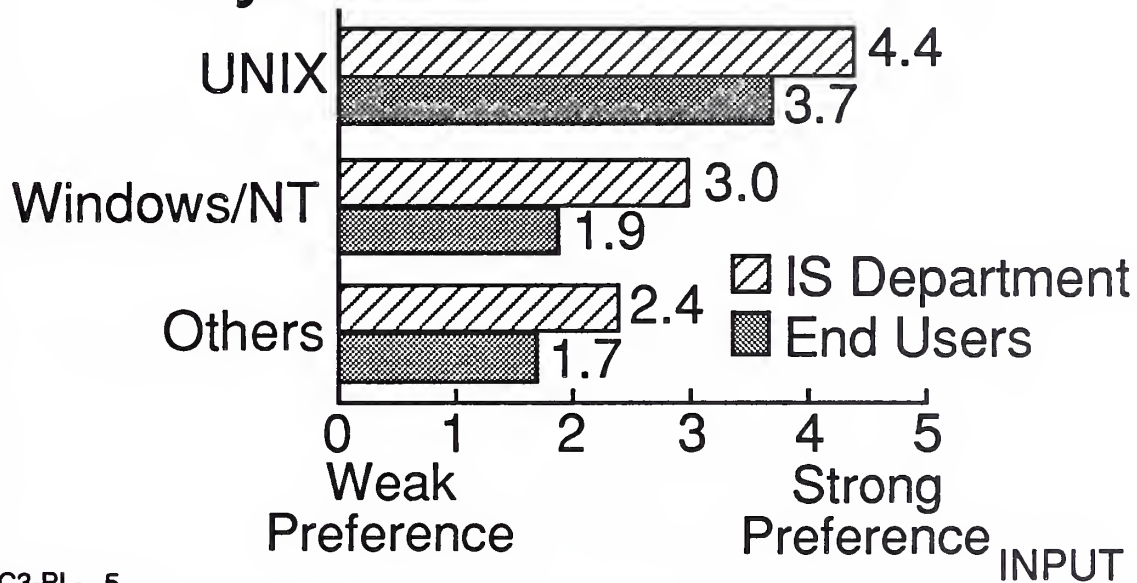
INPUT

MC3-PL- 4

Notes



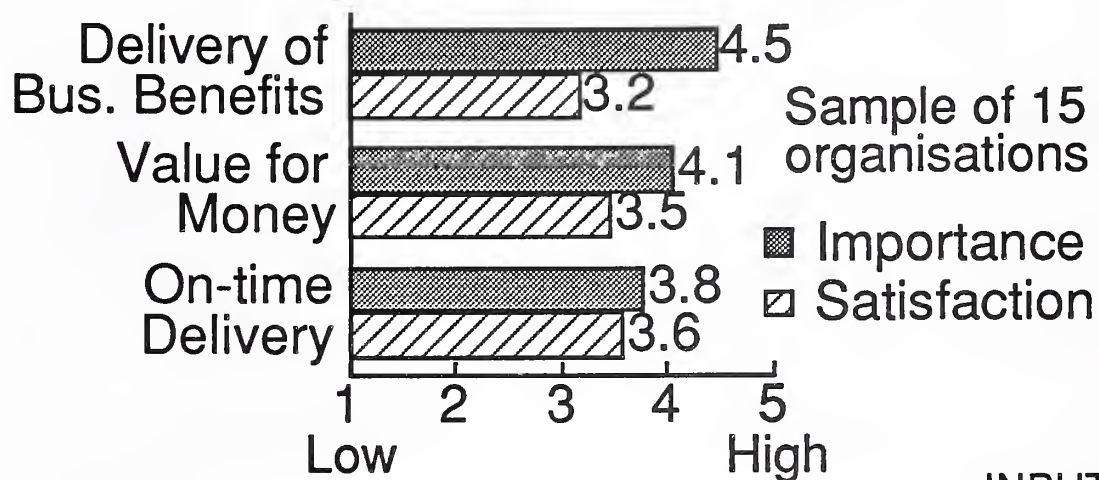
# European Operating System Preferences



Notes

## Systems Integration

# Achievement of Project Objectives

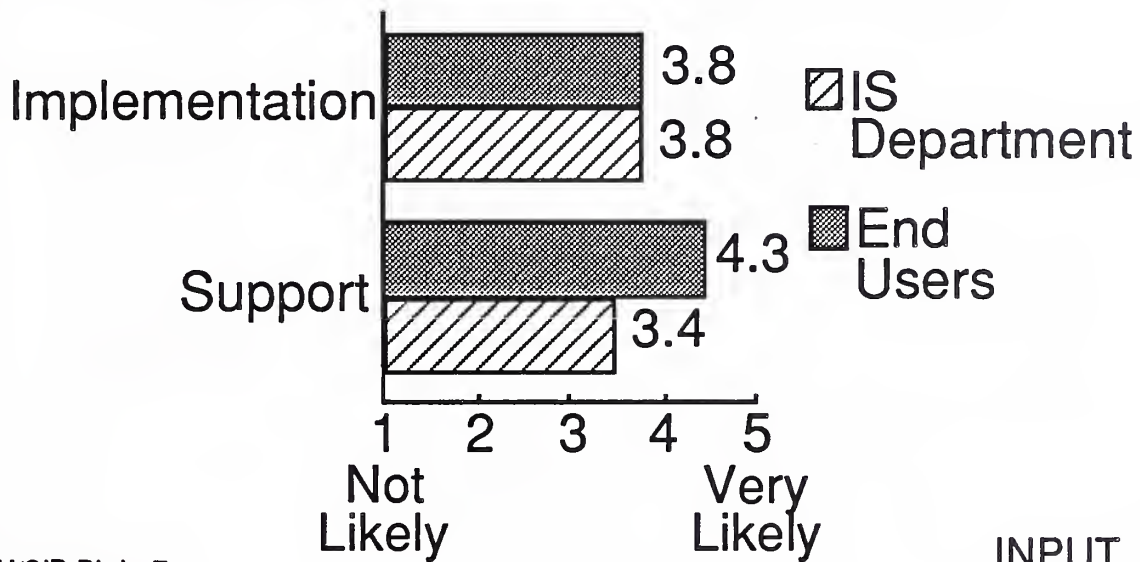


IEU/SIP-PL-I- 6

INPUT

## Notes

# European User Need for Client/Server Services

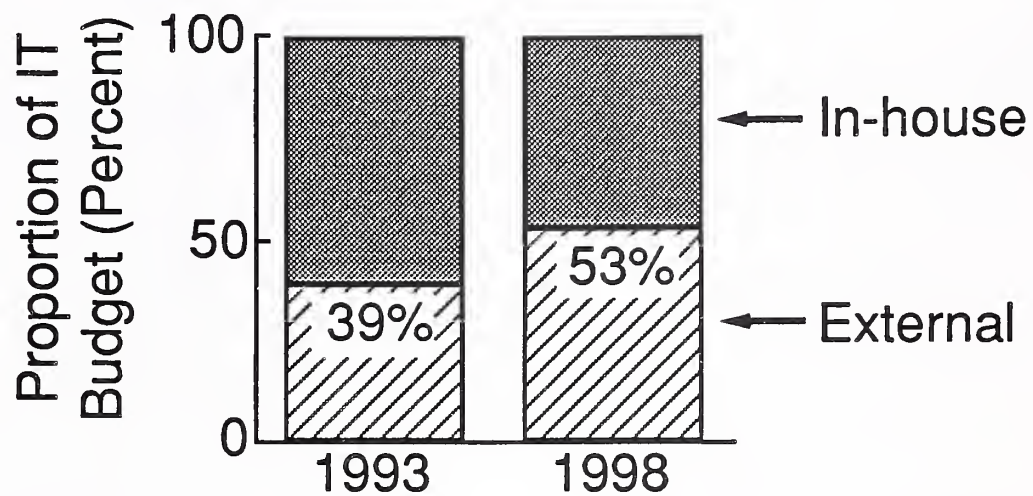


IEU/SIP-PL-I- 7

INPUT

Notes

# European IT Spending Changes

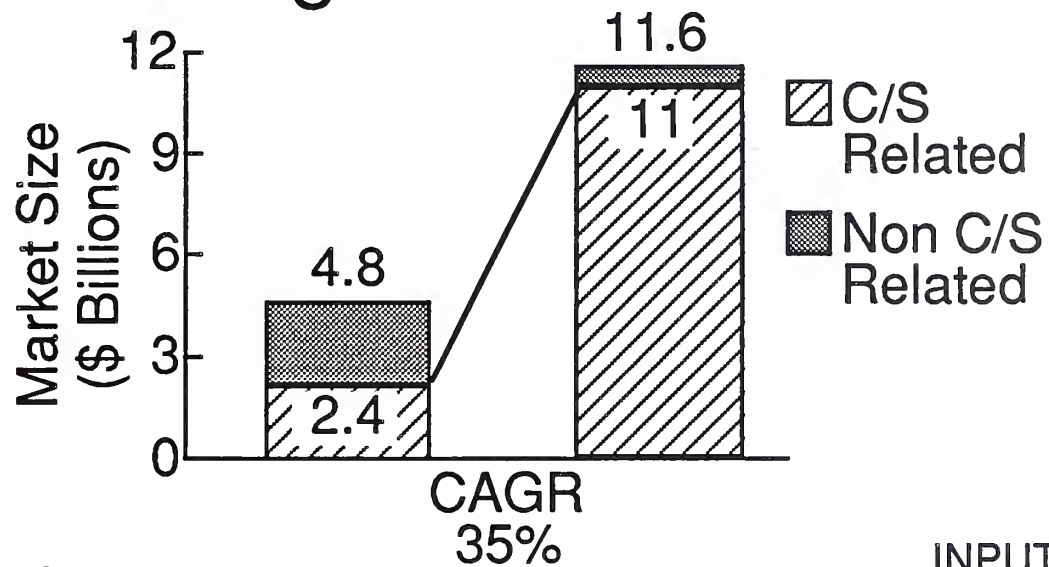


MC3-PL- 8

Notes



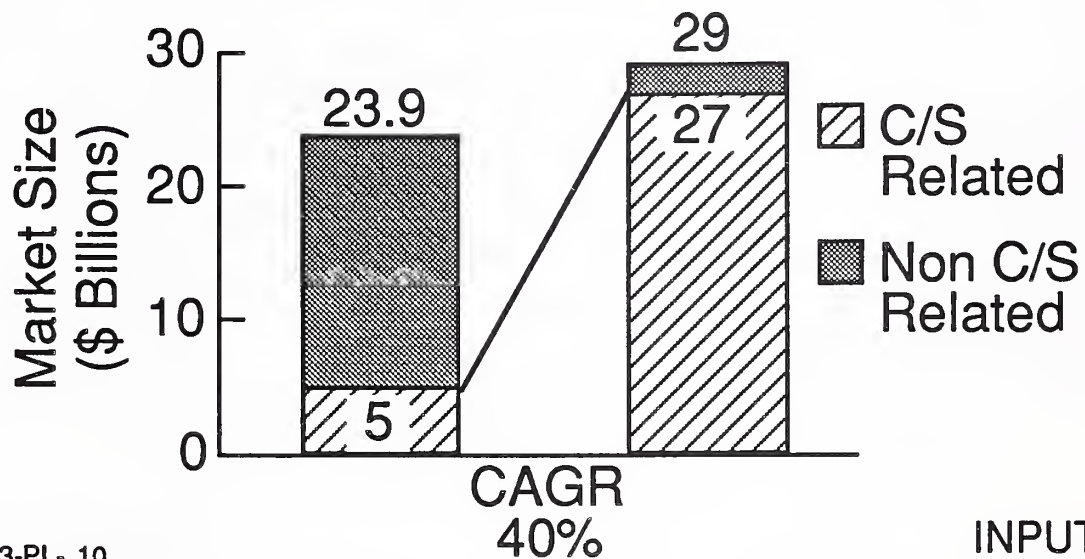
# European Systems Integration Market



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

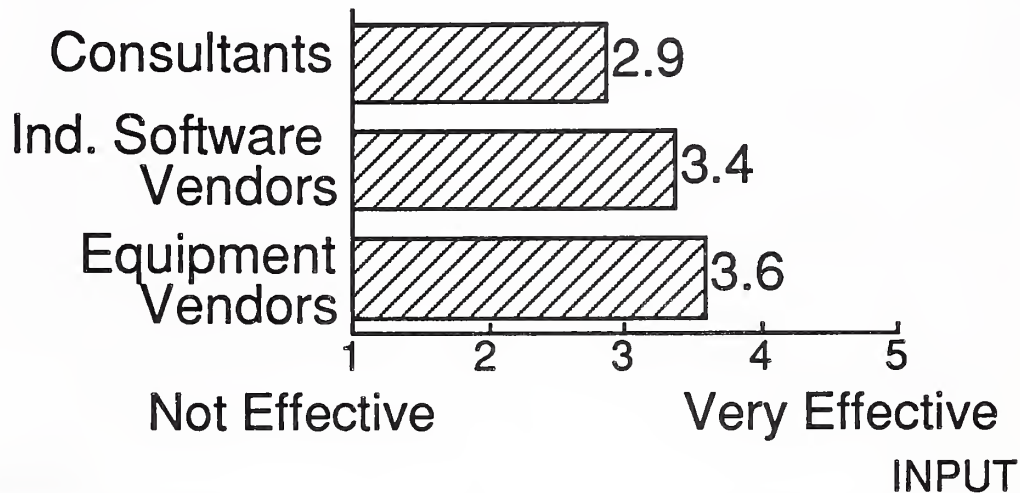
IS-77

INPUT

Notes

## Systems Integration

# Ability to Manage Projects User Perspective, U.K.



E-SI-154

## Notes



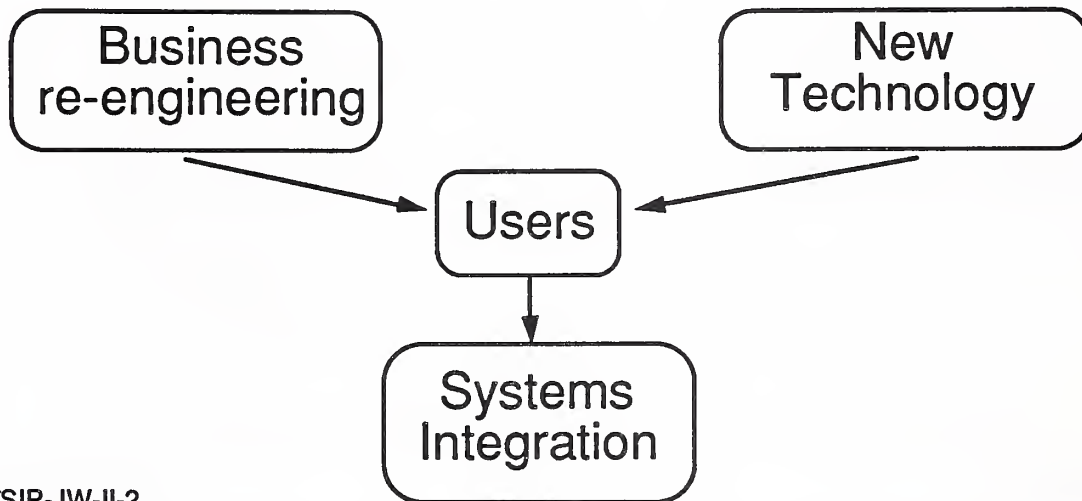
# U.K. Systems Integration Market Opportunity

IEU/SIP-JW-II- 1

INPUT

Notes

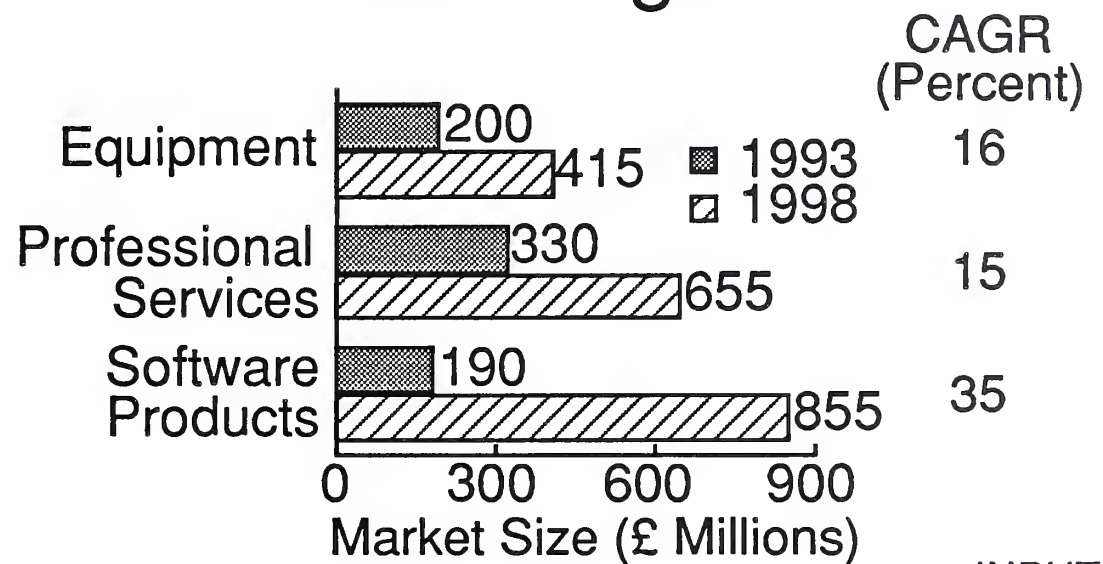
# Driving Forces, Systems Integration, United Kingdom



IEU/SIP-JW-II-2

## Notes

# Systems Integration Market United Kingdom



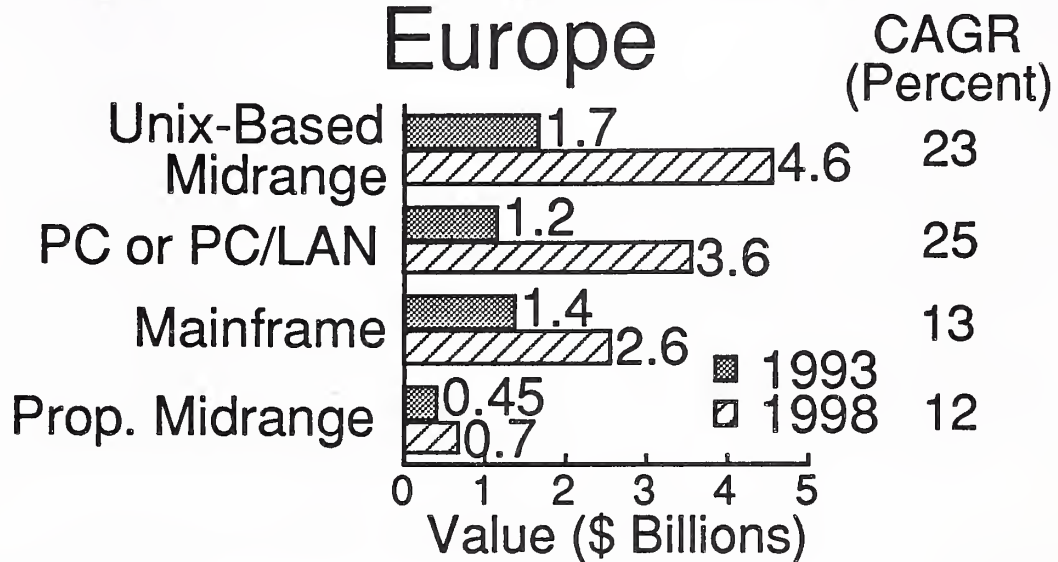
IEU/SIP-JW-II- 3

INPUT

## Notes

## Systems Integration

# Projects by Equipment Type Europe



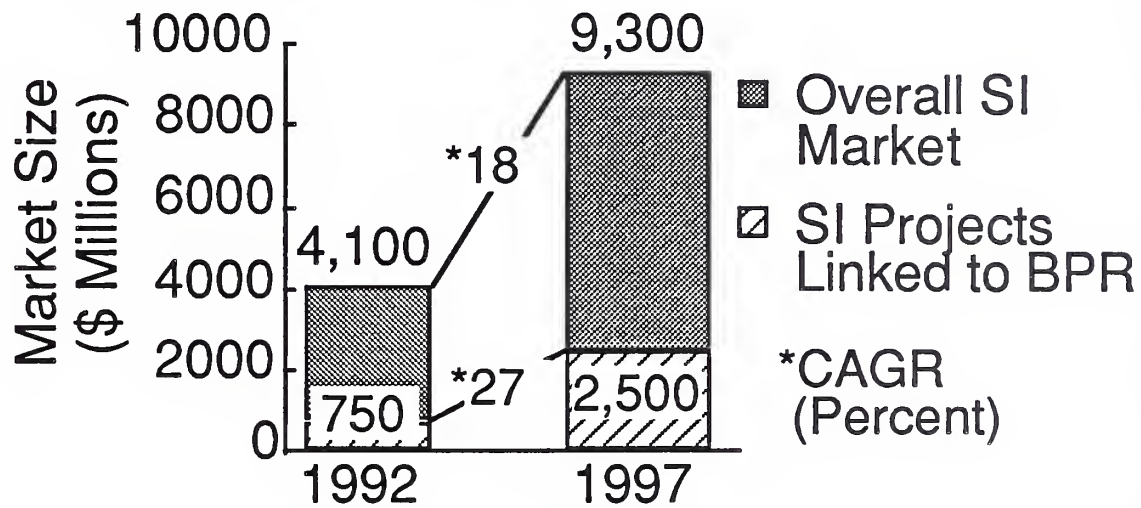
E-SI-161

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

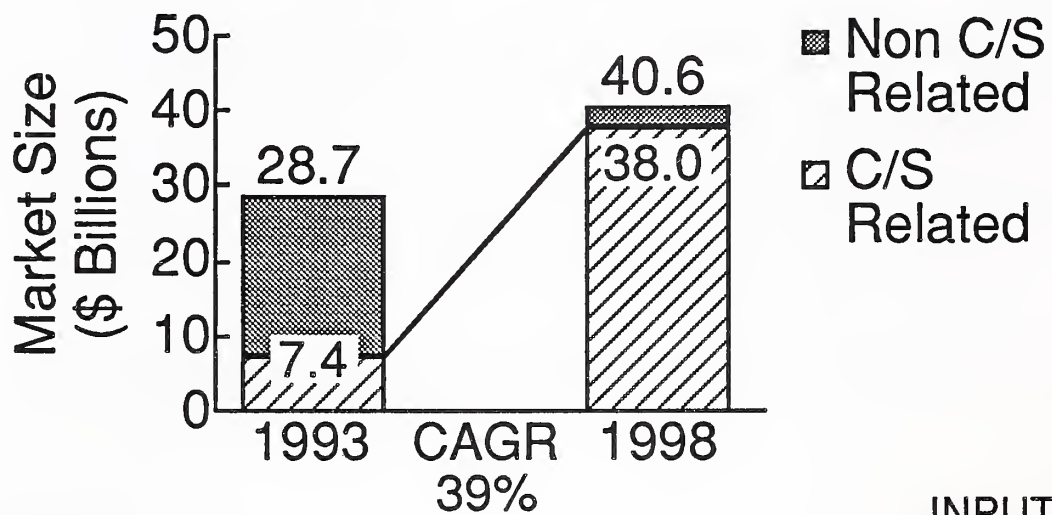
- Client/server technology fuels project services growth
- Integration services are a key requirement
- Level of competition will increase

IEU/SIP-JW-III- 2

INPUT

Notes

# Client/Server Project Services Market Forecast

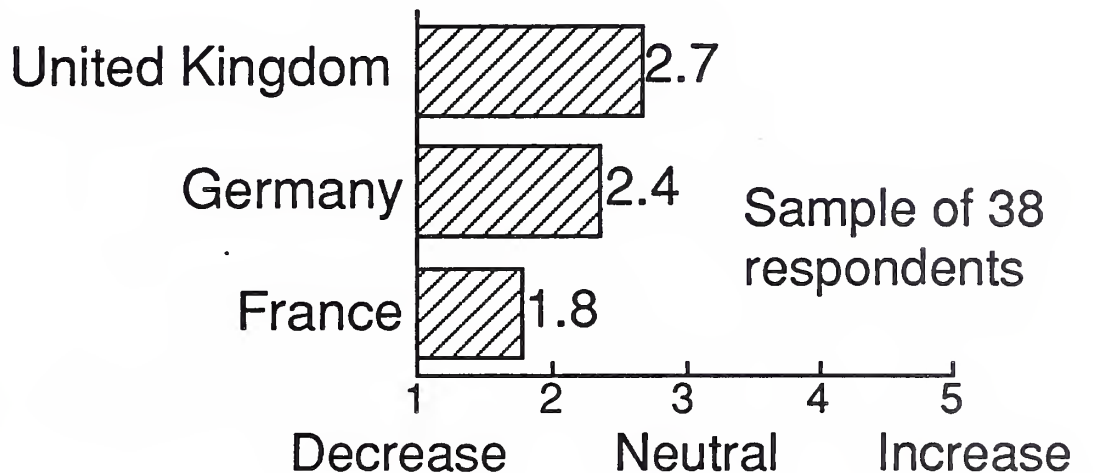


IEU/SIP-JW-III- 3

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

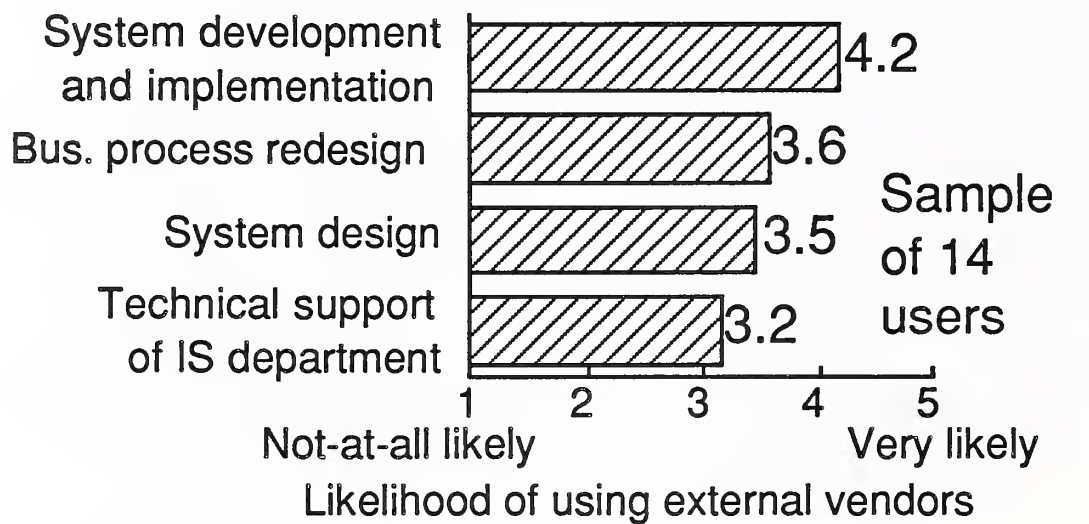
- IS departments require multi-vendor network design and implementation
- End users want application integration services
- Business process redesign is now a key requirement

IEU/SIP-JW-III- 6

INPUT

Notes

# Principal Service Requirements United Kingdom



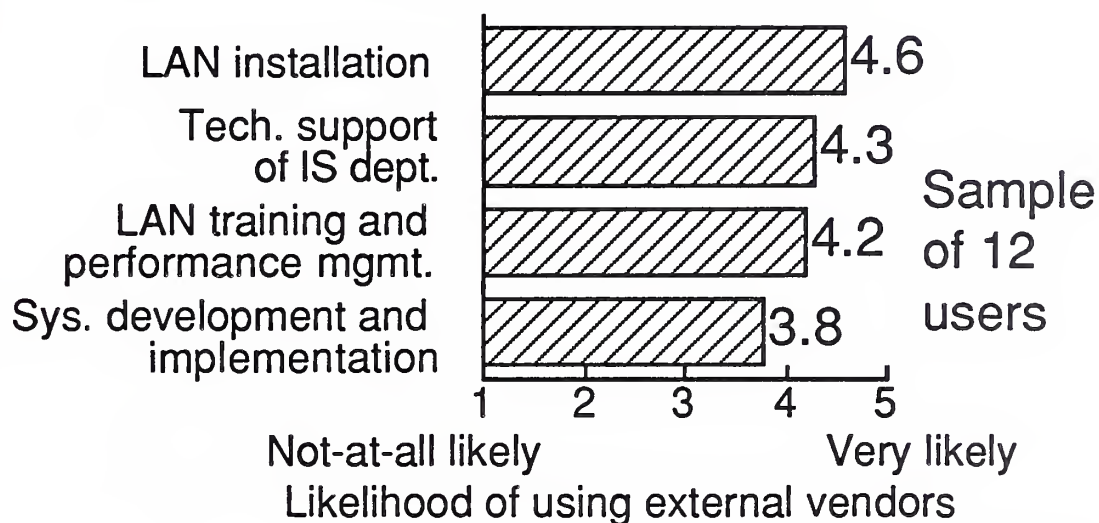
IEU/SIP-JW-III- 7

INPUT

## Notes



# Principal Service Requirements Germany

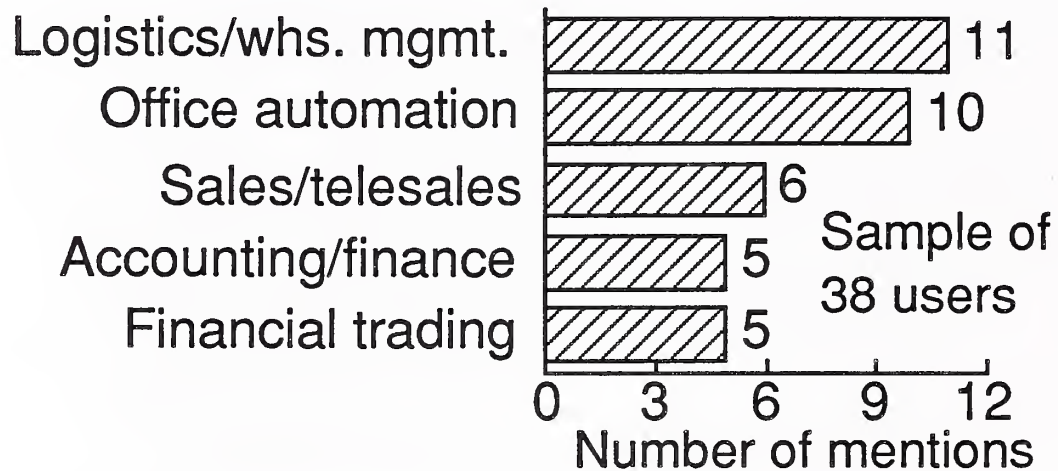


IEU/SIP-JW-III- 8

INPUT

## Notes

# Leading Applications in the Client/Server Environment



IEU/SIP-JW-III- 9

INPUT

Notes

# Vendor Selection Criteria End Users

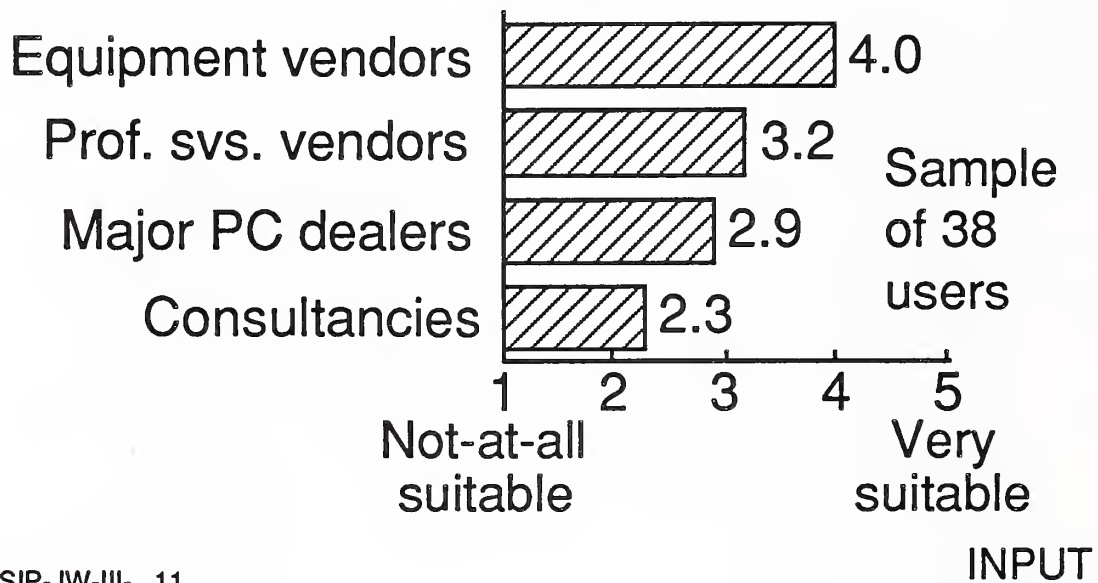
- Proven track record
- Competitively priced industry specific solutions
- Networking capability

IEU/SIP-JW-III- 10

INPUT

Notes

# Perceived Vendor Suitability Europe



IEU/SIP-JW-III- 11

## 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

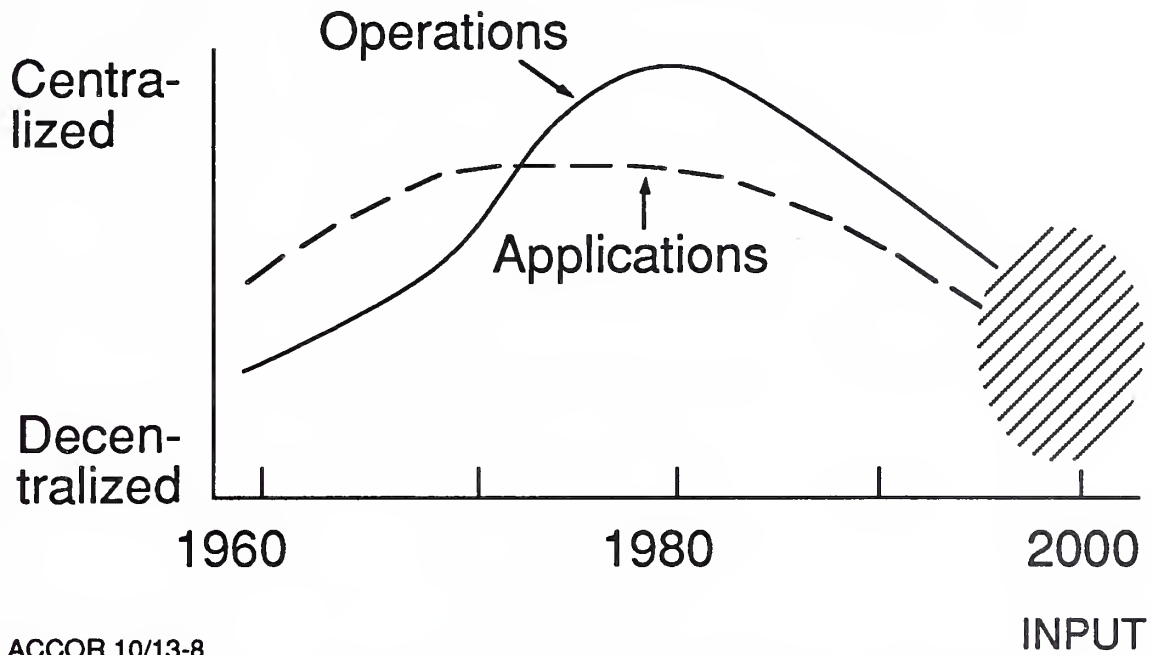
IEU/SIP-PL-IV- 2

INPUT

Notes



# IT Trends



## 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







