

U.S. Information Services Market Forecast and Analysis, 1993-1998

Robert Goodwin
Manager
Information Services
Market Analysis Program
INPUT



1993: The Worst of Times

- Slow recovery from global recession
- Intense competition
- Demise of proprietary systems
- Mainframe and mini shipment decline
- Systems software's lower growth

INPUT

MC3-BG-2a

Notes



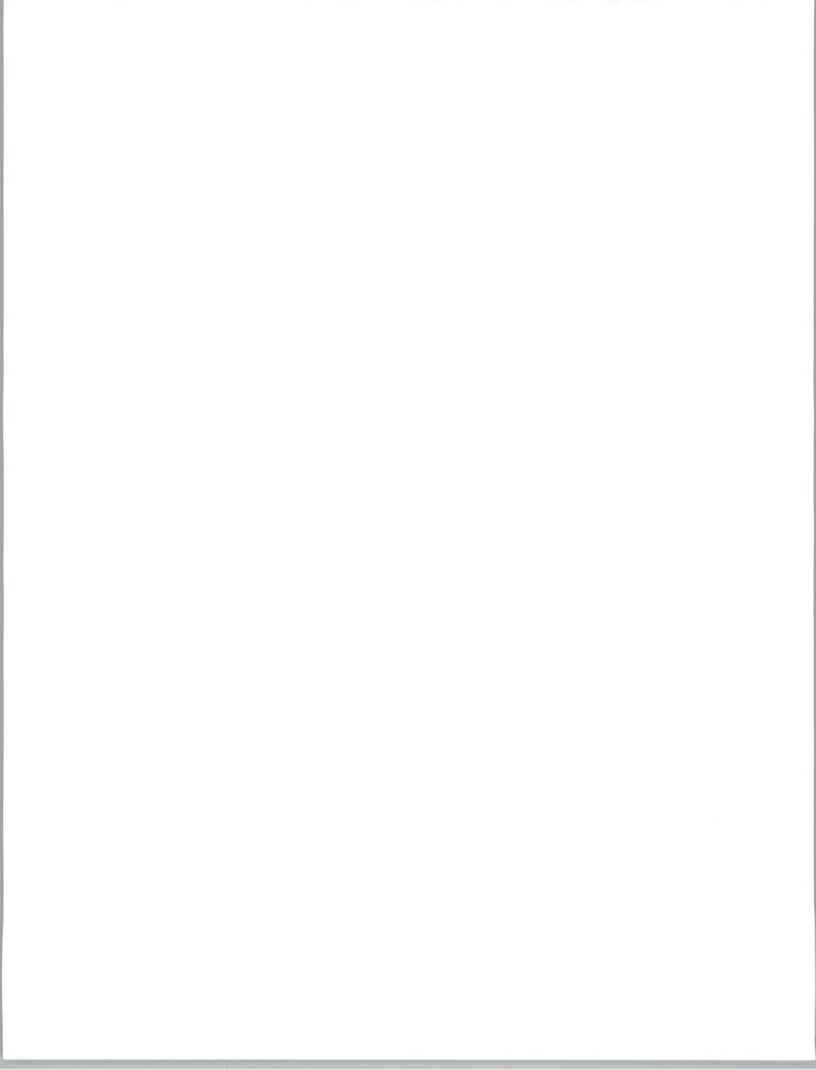
1993: The Worst of Times

- Profit squeeze
- Client/server paradigm creates risks
- Complex user-driven solutions
- Longer selling cycles
- Maturation of major markets
- 12% CAGR, 1993-1998

INPUT

MC3-BG-2b

Notes



1993: The Best of Times

- Recovery from recession (slow)
- Globalization of IS
- Client/server creates opportunities
- Open systems standards and acceptance
- Customizable software products

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MC3-BG-3a

Notes

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1993: The Best of Times

- Business process change
- Multimedia
- Information super-highway
- PC/Workstation software products growth
- 12% CAGR, 1993-1998, \$285 billion in aggregated new revenues

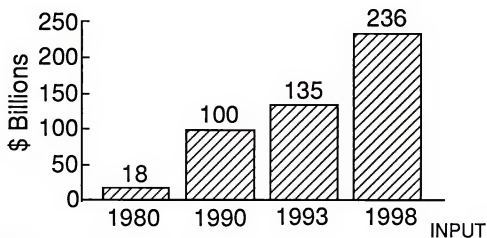
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U.S. Information Services Industry 1970-1998

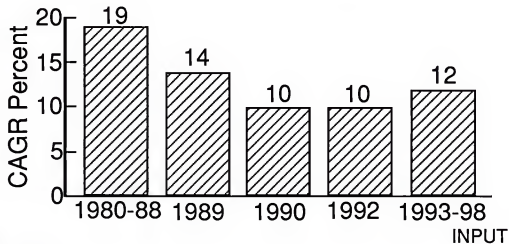


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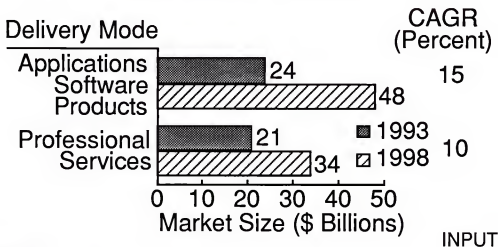
U.S. Information Services Industry: Annual Growth Rates



MC3-BG-5

Notes

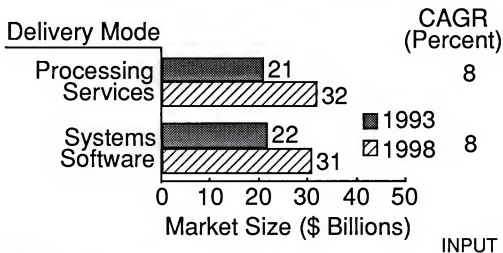
U.S. Information Services Industry



MC3-BG-6a

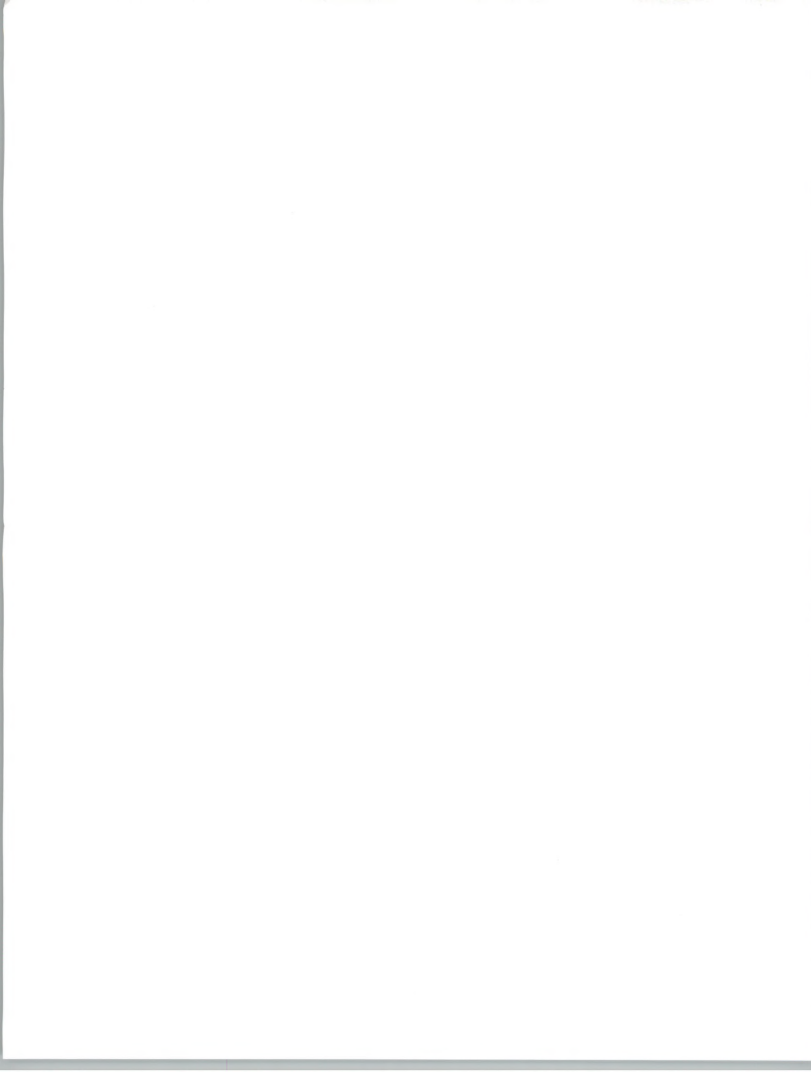
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U.S. Information Services Industry

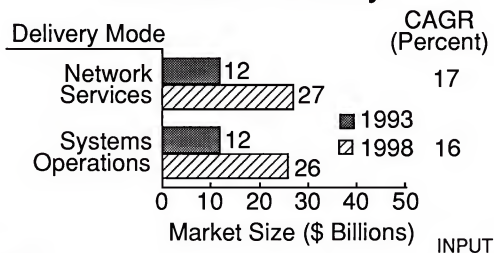


MC3-BG-6b

Notes



U.S. Information Services Industry



MC3-BG-6c

Notes

the 1990s, the number of people with a mental health problem has increased by 50% (Mental Health Foundation 2000). The prevalence of mental health problems in the UK is estimated to be 10% (Mental Health Foundation 2000).

There is a growing awareness of the need to address the needs of people with mental health problems. The Department of Health (2000) has published a strategy for mental health care, which aims to improve the lives of people with mental health problems. The strategy is based on the following principles:

- People with mental health problems should be treated as individuals, with their own needs and wishes.
- People with mental health problems should be given the opportunity to participate in decisions about their care.
- People with mental health problems should be given the opportunity to live in the community.
- People with mental health problems should be given the opportunity to work and study.

The strategy also aims to improve the lives of people with mental health problems by: reducing the stigma and discrimination against people with mental health problems; improving the support and services available to people with mental health problems; and improving the training and education of health and social care professionals.

The strategy is a key document for the development of mental health services in the UK. It provides a framework for the development of mental health services and for the evaluation of their effectiveness.

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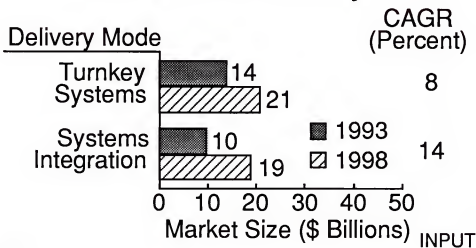
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U.S. Information Services Industry



MC3-BG-6d

Notes

The first part of the paper discusses the importance of understanding the cultural context of the research. It highlights the need for researchers to be sensitive to the values and beliefs of the communities they are studying. This is particularly important in the field of education, where cultural differences can significantly impact learning outcomes. The paper then moves on to discuss the challenges of conducting research in diverse cultural settings. It notes that researchers often face difficulties in establishing rapport with participants and in interpreting their responses. To address these challenges, the paper suggests several strategies, including the use of local researchers and the development of culturally appropriate research instruments. The final part of the paper discusses the importance of ethical considerations in cross-cultural research. It emphasizes the need for researchers to obtain informed consent from participants and to ensure that their research does not cause harm or exploitation. The paper concludes by noting that while cross-cultural research is a complex and challenging endeavor, it is also a highly rewarding one that can lead to a deeper understanding of human behavior and culture.

Equipment Forecast Scenarios, 1993-98

- PC/Workstation
 - Unit growth rate 25%
 - Annual price erosion 20%
 - Revenue growth 5%

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MC3-BG-7a

Notes

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Equipment Forecast Scenarios, 1993-98

- Minicomputers
 - Unit growth rate 6%
 - Annual price erosion 8%
 - Revenue growth -2%

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MC3-BG-7b

Notes

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Equipment Forecast Scenarios, 1993-98

- Mainframes

- Unit growth rate -3%
- Annual price erosion 8%
- Revenue growth -11%

INPUT

MC3-BG-7c

Notes

Systems Software Products Major Forecast Changes

| | Market CAGR (%) | |
|----------------|-----------------|---------|
| | 1992-97 | 1993-98 |
| Mainframe | 10 | 1 |
| Mini | 11 | 4 |
| PC/Workstation | 22 | 19 |
| Total Market | 14 | 8 |

INPUT

MC3-BG-8

Notes

the 1990s, the number of people in the UK with a mental health problem has increased by 50% (Mental Health Act 1983, 1993). The prevalence of mental health problems in the UK is estimated to be 10% (Mental Health Act 1983, 1993).

There is a growing awareness of the need to address the needs of people with mental health problems in the workplace. The Mental Health Act 1983 (1993) states that employers have a duty to provide a safe and healthy working environment for their employees. This duty includes the need to take steps to prevent the occurrence of mental health problems in the workplace.

The Mental Health Act 1983 (1993) also states that employers have a duty to provide support and assistance to employees who are experiencing a mental health problem. This support and assistance should be provided in a way that is appropriate to the individual's needs and the nature of the work.

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Systems Software Product Forecasts

| | 1992-97 CAGR (%) | 1993-98 CAGR (%) |
|-------------------------------|---------------------|---------------------|
| Systems control products | 10 | 1 |
| Operations mgmt. tools | 11 | 7 |
| Application development tools | 13 | 12 |

INPUT

MC3-BG-9

Notes

Systems Software Products: Reduced Growth Rates

- Possible “implosion”
- Rapid decline in mainframe equipment shipments
- PC equipment: saturated market?

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MC3-BG-10a

Notes

The first part of the paper discusses the importance of understanding the cultural context of the research. It highlights the need for researchers to be sensitive to the values and beliefs of the communities they are studying. This is particularly important in the field of education, where cultural differences can significantly impact learning outcomes. The author argues that a one-size-fits-all approach to education is not only ineffective but also disrespectful to the diverse cultures of our world.

In the second part, the author explores the challenges of conducting research in non-Western contexts. One major challenge is the lack of standardized methodologies. What works in one culture may not work in another, and researchers must be willing to adapt their methods accordingly. Another challenge is the potential for bias, either from the researcher or from the participants. The author emphasizes the importance of transparency and reflexivity in the research process.

The third part of the paper focuses on the role of the researcher in the research process. It discusses the ethical implications of research and the importance of building trust with the community. The author suggests that researchers should see themselves as collaborators rather than outsiders, working together with the community to address its needs and concerns.

Finally, the author concludes by emphasizing the value of cross-cultural research. By understanding different cultures, we can gain a deeper appreciation of our own and develop more effective strategies for addressing global challenges. The author calls for a more inclusive and culturally sensitive approach to research and education.

Systems Software Products: Reduced Growth Rates

- Downward pricing pressures
 - Mainframe software price reductions
 - PC software price wars
 - User expectations
- Software products becoming commodities

INPUT

MC3-BG-10b

Notes

The first part of the paper discusses the importance of understanding the underlying mechanisms of the observed phenomena. This is followed by a detailed analysis of the data, which shows that the results are consistent with the theoretical predictions. The final section concludes the paper by summarizing the findings and suggesting directions for future research.

The second part of the paper focuses on the methodological aspects of the study. It describes the data sources, the sample selection process, and the statistical models used to analyze the data. The results of the empirical analysis are presented in a series of tables and figures, which illustrate the key findings of the study.

The third part of the paper discusses the policy implications of the findings. It highlights the importance of understanding the underlying mechanisms of the observed phenomena and suggests ways in which the results can be used to inform policy decisions. The paper concludes by emphasizing the need for further research in this area.

Systems Software Products: Reduced Growth Rates

- Phase-out of tiered pricing
- Enterprise software licensing trends
 - Long-term
 - User-based
 - Fixed price maintenance

INPUT

MC3-BG-10c

Notes

The first part of the paper discusses the importance of understanding the cultural context of the research. It highlights the need for researchers to be sensitive to the values and beliefs of the communities they are studying. This is particularly important in the field of health research, where cultural differences can significantly impact the effectiveness of interventions.

The second part of the paper presents a review of the literature on cultural competence in health care. It examines the various models and frameworks that have been developed to guide the development of culturally competent health care providers. The review also identifies the challenges and barriers to achieving cultural competence in practice.

The third part of the paper describes the methodology used in the study. It details the selection of participants, the data collection methods, and the analysis techniques. The study was conducted in a community-based setting, and the participants were recruited through a snowball sampling method.

The fourth part of the paper presents the findings of the study. It discusses the themes that emerged from the data and the implications for practice. The findings suggest that there is a need for more culturally sensitive health care services and that health care providers should receive training in cultural competence.

The fifth part of the paper discusses the limitations of the study and suggests areas for future research. It notes that the study was limited to a specific community and that the findings may not be generalizable to other populations. Future research should aim to explore the cultural context of health care in different communities and to develop more effective interventions.

Software Product Pricing

- Downward pull in rough proportion to equipment price decline, but with lower amplitude
 - Software is value-added component
 - Client/server pricing can minimize erosion
- Pricing flexibility in Middleware

INPUT

MC3-BG-11

Notes

the 1990s, the number of people with a diagnosis of schizophrenia has increased in the United Kingdom (Meltzer 1998). The prevalence of schizophrenia in the United Kingdom is estimated to be 1.2% (Meltzer 1998).

There is a growing awareness of the need to improve the lives of people with mental health problems. The United Kingdom has a number of government departments and agencies that are responsible for the care of people with mental health problems. The Department of Health is responsible for the overall policy and strategy for mental health care. The Department of Social Security is responsible for the provision of social security benefits to people with mental health problems. The Department of the Environment is responsible for the provision of housing and other services to people with mental health problems.

The National Health Service (NHS) is responsible for the provision of mental health services. The NHS is a public body that is funded by the government. The NHS is responsible for the provision of a wide range of mental health services, including community mental health teams, inpatient services, and out-patient services. The NHS is also responsible for the provision of mental health services to people with learning disabilities.

The Mental Health Act 1983 is the primary legislation governing the care of people with mental health problems in the United Kingdom. The Act sets out the principles and objectives of mental health care. The Act also sets out the powers of the courts and the powers of the Secretary of State. The Act is a complex piece of legislation and it is not possible to provide a full summary of its provisions in this paper.

The purpose of this paper is to provide a brief overview of the current state of mental health care in the United Kingdom. The paper will discuss the challenges facing mental health care and the need for reform. The paper will also discuss the role of the courts and the role of the Secretary of State in the provision of mental health care. The paper will conclude by discussing the need for a new approach to mental health care.

The current state of mental health care in the United Kingdom is characterized by a number of challenges. The first challenge is the increasing prevalence of mental health problems. The second challenge is the need to improve the quality of mental health care. The third challenge is the need to reduce the costs of mental health care. The fourth challenge is the need to improve the access to mental health care.

The need for reform is driven by a number of factors. The first factor is the increasing prevalence of mental health problems. The second factor is the need to improve the quality of mental health care. The third factor is the need to reduce the costs of mental health care. The fourth factor is the need to improve the access to mental health care.

The role of the courts and the role of the Secretary of State in the provision of mental health care is a complex issue. The courts have a number of powers in relation to mental health care. The Secretary of State has a number of powers in relation to mental health care. The role of the courts and the role of the Secretary of State are discussed in more detail in the paper.

The need for a new approach to mental health care is driven by a number of factors. The first factor is the increasing prevalence of mental health problems. The second factor is the need to improve the quality of mental health care. The third factor is the need to reduce the costs of mental health care. The fourth factor is the need to improve the access to mental health care.

Software Market Positioning Issues

- Major battle: Windows NT and NetWare/UNIX for server markets
- Standardization of UNIX operating system
- Control of operating system market brings control of application solutions

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MC3-BG-12

Notes

Professional Services Markets

| Platform | 1992 Revenues (%) | 1998 Revenues (%) |
|----------------------------|----------------------|----------------------|
| Mainframe | 52 | 15 |
| Workstation/PC | 25 | 60 |
| Midrange | 21 | 15 |
| Standalone open systems | 2 | 10 |
| Total | 100 | 100 |

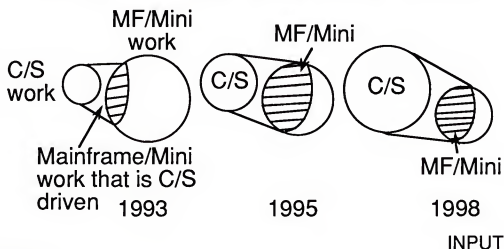
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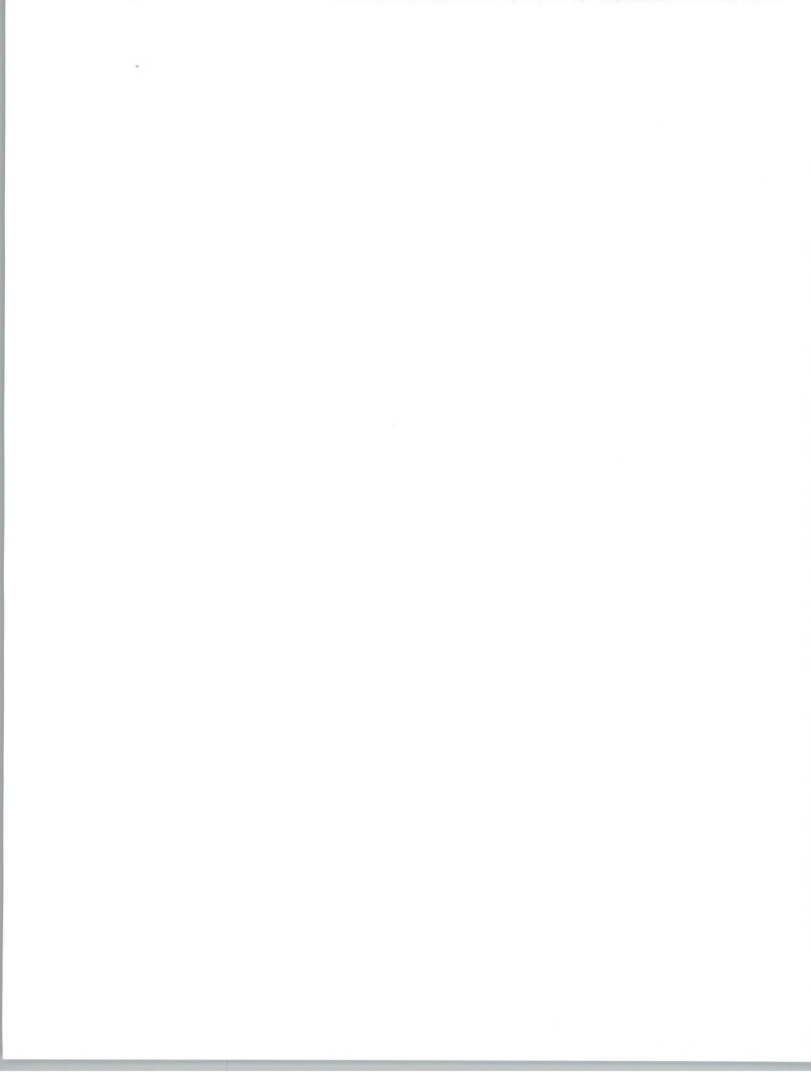
Notes



Client/Server Influence on Professional Services Work



Notes



Business Process Change Leverage on Information Services

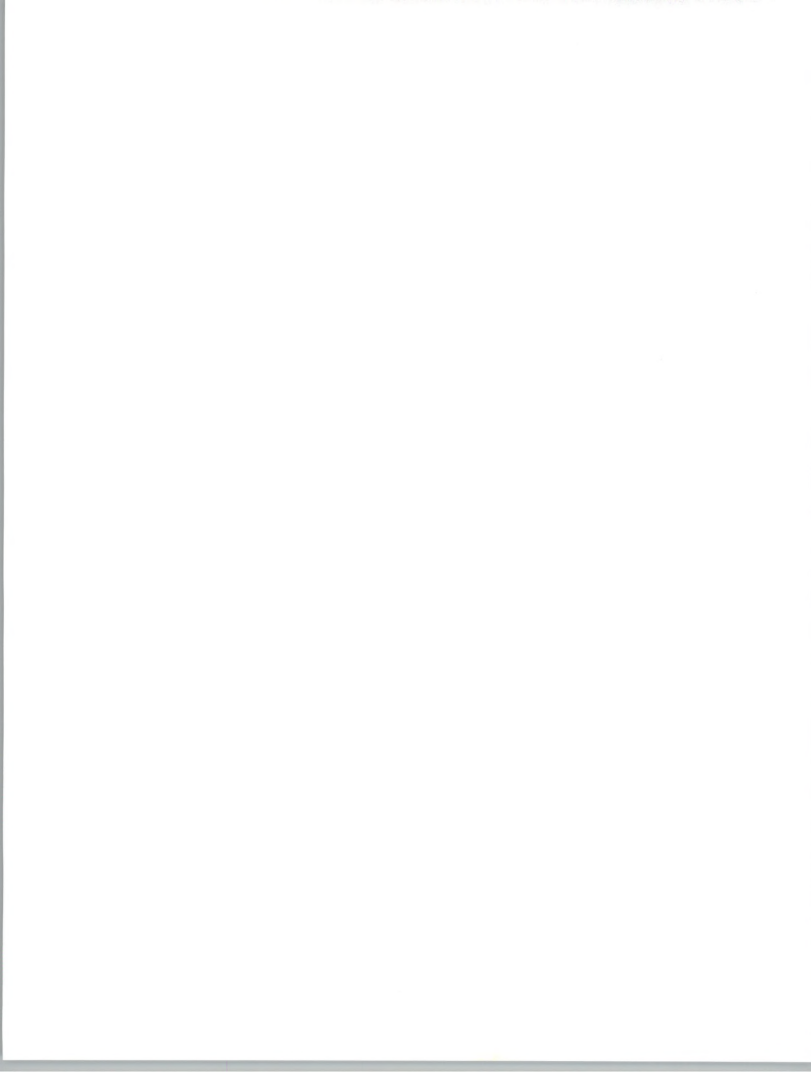
BPC drives new information services

- Restructuring organizations
- Quality programs
- Cost reduction/value
- C/S architecture
- Imaging

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MC3-BG-15

Notes



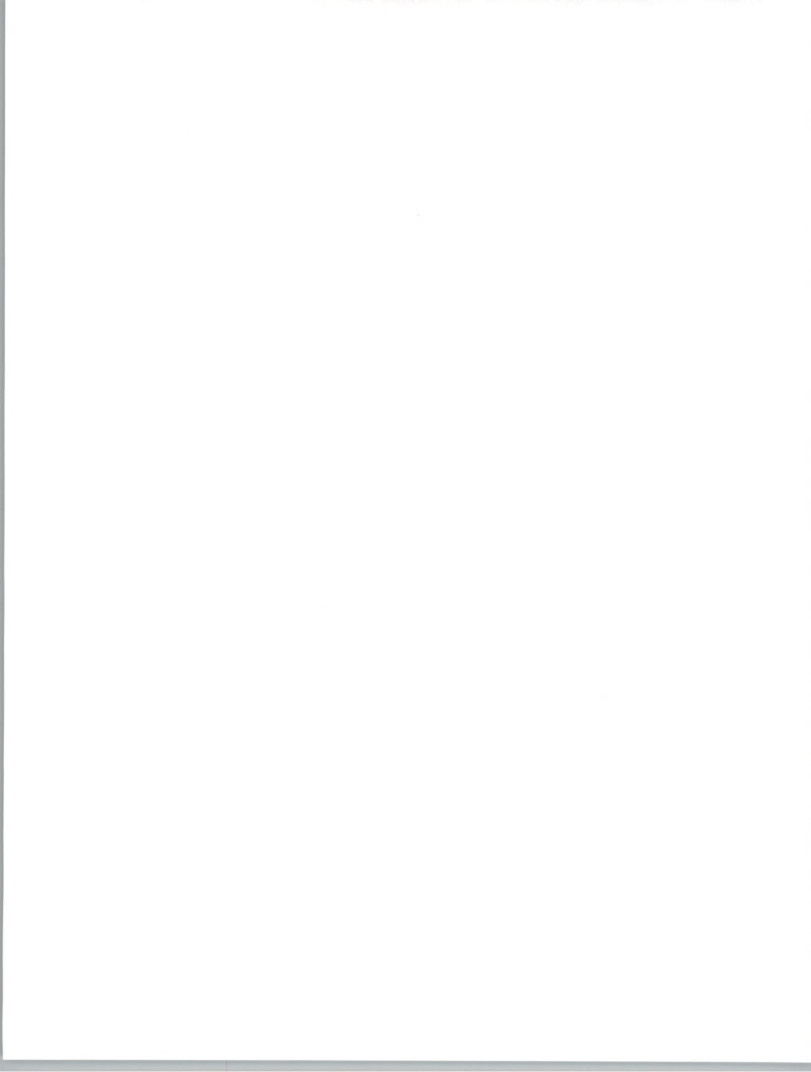
Rising Cost of Sales: Drain on Vendor Profits

- Complex solutions require longer selling cycle
- Recessionary thinking causes buyer caution, slower decisions
- More frequent ROI analysis causes delays

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MC3-BG-16a

Notes



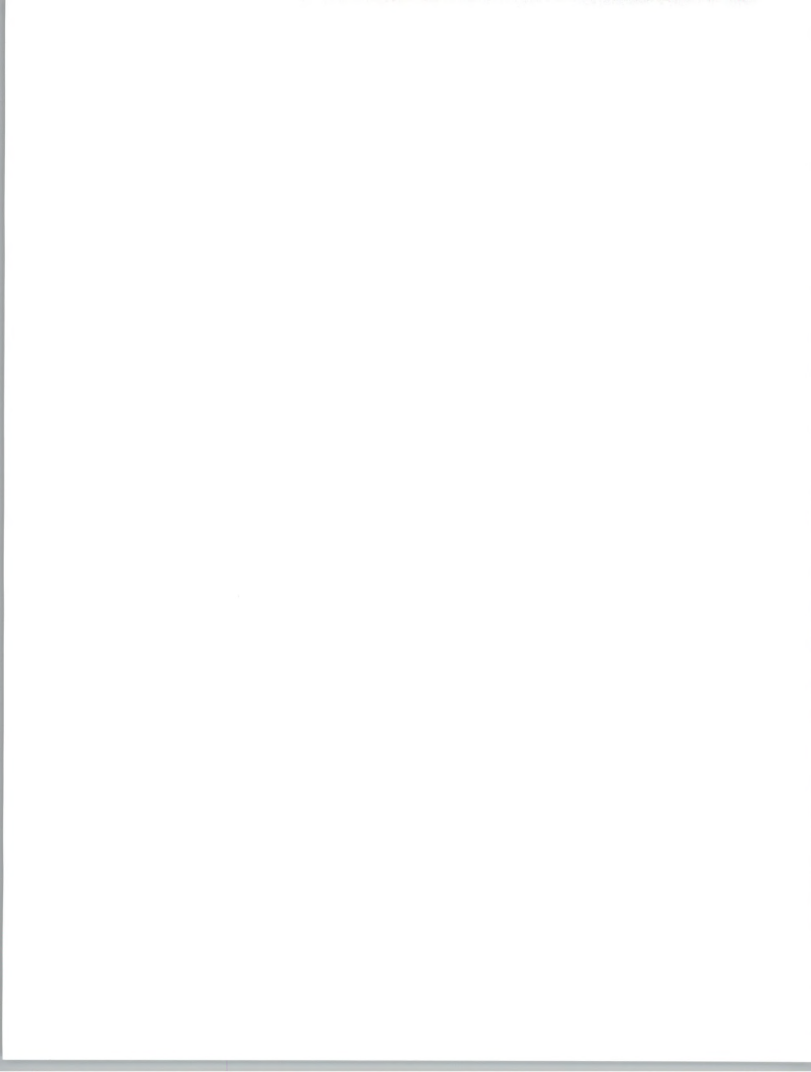
Rising Cost of Sales: Drain on Vendor Profits

- Multi-dept. user involvement complicates decision
- New training needed for sales forces:
 - Technical competence
 - Complex selling/buying cycle

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MC3-BG-16b

Notes



Conclusions

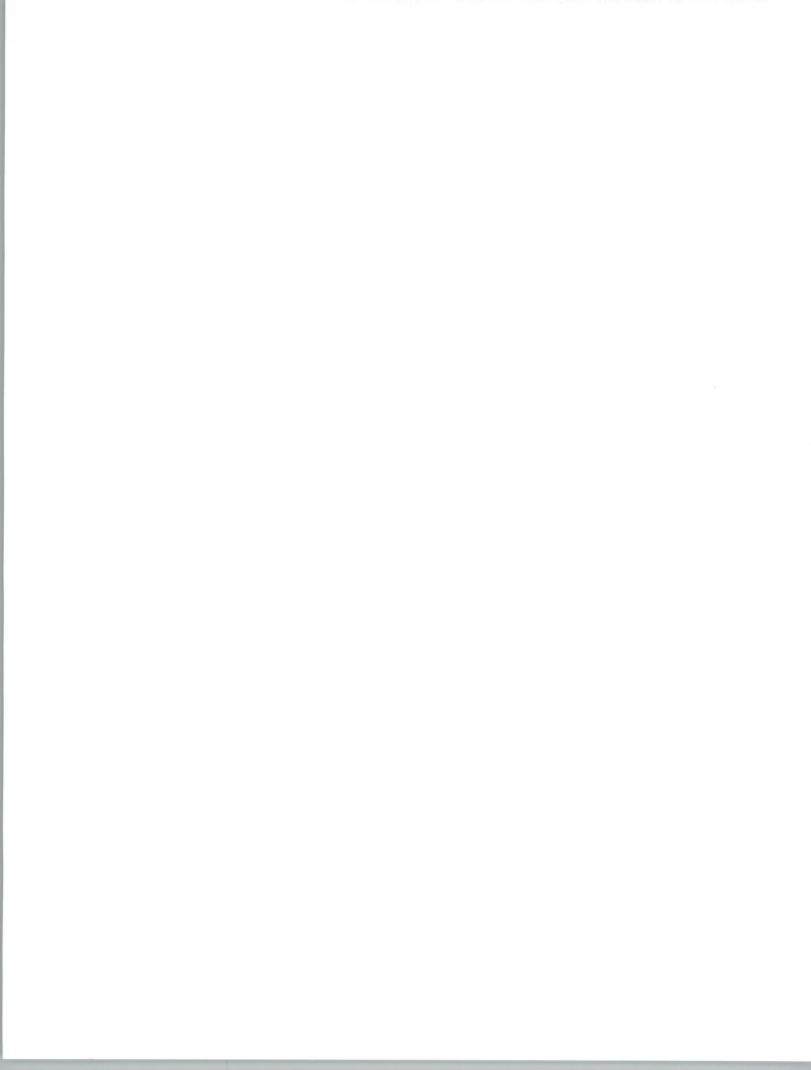
The best of times *IS* here,
for vendors who can:

- Deliver client/server solutions
- Achieve global presence
- Deliver open systems solutions
- Sell/consult at strategic levels

INPUT

MC3-BG-17a

Notes



Conclusions

The best of times *IS* here,
for vendors who can:

- Provide software solutions on multiple operating systems
- Form alliances to expand client/server product scope, skill sets, market coverage

INPUT

MC3-BG-17b

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Conclusions

The best of times *IS* here,
for vendors who can:

- Build alternate delivery channels
- Provide customizable products
- Offer a continuum of services

INPUT

MC3-BG-17c

Notes

The first part of the paper discusses the importance of understanding the underlying mechanisms of the observed phenomena. This is followed by a detailed analysis of the data, which reveals several key findings. The results indicate that the proposed model is highly effective in capturing the essential features of the system under study. Furthermore, the analysis shows that the model's performance is robust across different parameter settings and data distributions. The final section of the paper concludes with a summary of the findings and suggests directions for future research.

The second part of the paper focuses on the theoretical aspects of the problem. It begins by defining the key concepts and terms used throughout the study. This is followed by a rigorous proof of the main theorem, which establishes the validity of the proposed model. The proof is based on a series of lemmas and propositions, which are carefully derived and verified. The final part of the section discusses the implications of the results and their potential applications in various fields.

The third part of the paper presents a series of experiments designed to evaluate the performance of the proposed model. These experiments are conducted using a variety of datasets and configurations, allowing for a comprehensive assessment of the model's capabilities. The results of these experiments are presented in a series of tables and figures, which clearly demonstrate the model's superior performance compared to existing methods. The experiments also highlight the model's ability to handle complex and noisy data, making it a valuable tool for researchers in this field.

The fourth part of the paper discusses the practical applications of the proposed model. It explores how the model can be used to solve real-world problems, such as predicting system behavior and optimizing resource allocation. The paper also discusses the challenges associated with implementing the model in a practical setting and provides suggestions for overcoming these challenges. Finally, the paper concludes with a summary of the key findings and a call to action for the research community to further explore the potential of this model.

Conclusions

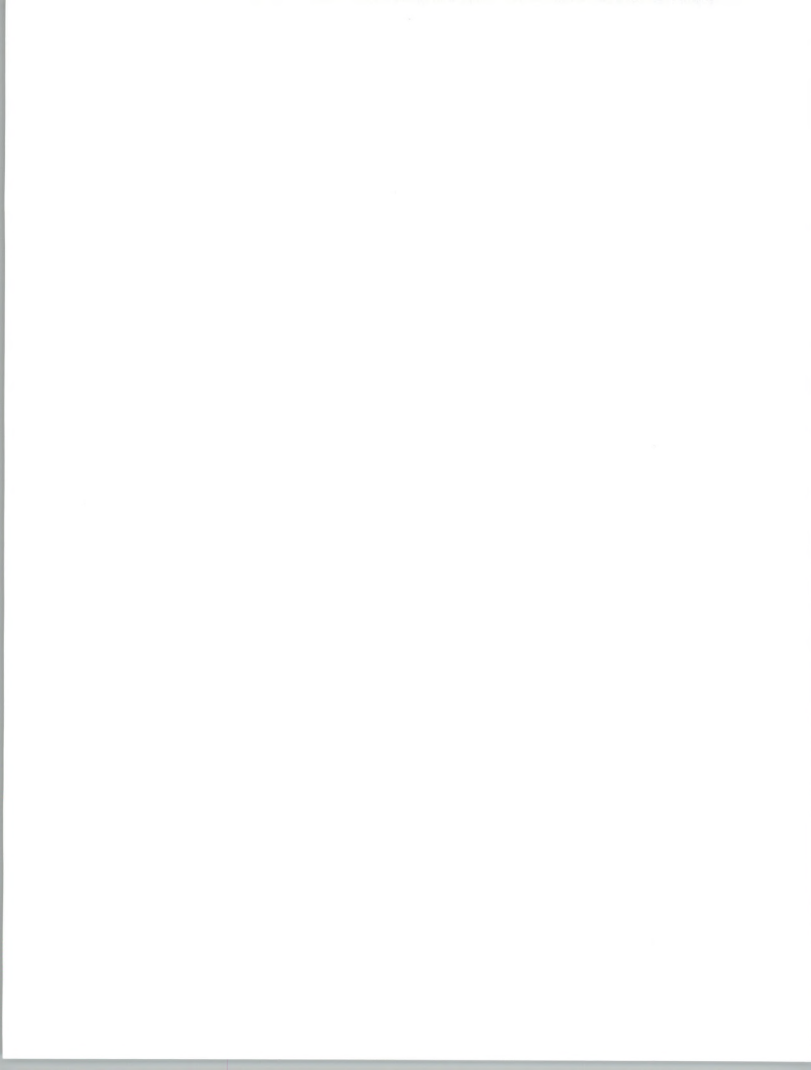
The best of times *IS* here,
for vendors who can:

- Invest in sales training
 - Sales staff
 - Support staff

INPUT

MC3-BG-17d

Notes



Conclusions

The best of times *IS* here,
for vendors who can:

- Leverage their expertise
 - Vertical market
 - Technology/establish technology centers

INPUT

MC3-BG-17e

Notes

ROBERT L. GOODWIN
MANAGER, INFORMATION SERVICES
MARKET ANALYSIS PROGRAM

PROFILE

CAPABILITIES

- Twenty-five years of successful sales, marketing, and general management in the computer equipment, remote processing services, and software industries.
- Expertise in business plan development, strategic partnering and acquisitions, industry marketing, VAR and reseller operations.

BACKGROUND

- Robert (Bob) Goodwin brings to INPUT and its clients comprehensive experience in executive management in large and mid-size corporations.
- Most recently, Senior Vice President—Marketing, Hotel Information Systems, leading vendor of global information systems to the hospitality industry.
- He has served as President of Command Data Systems, a public safety software and turnkey systems vendor. With Bob's leadership and marketing strategy, CDS became a highly visible and respected vertical market leader.
- Bob's qualifications include the role of Director of Marketing for Xerox Computer Services, in support of all field sales and customer services activities.
- At IBM, Bob served as Branch Manager and Assistant District Manager.
- Chairman, Electronic Forms Transfer Committee, ITAA

EDUCATION

- B.A., Psychology, Occidental College.
- Attended the MBA program, Golden Gate University.

