Key Distribution Industry Trends, Europe

- Electronic commerce favored
- Retailers bypass wholesalers
- Downsizing limits IS spending
- Equipment vendors lead market

E-CT-1

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Delivery Mode Trends

- Network services—Continuing explosive growth
- Systems operations—Long-term business partnerships
- Systems integration—Prime contractors seek account control

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Delivery Mode Trends

- Processing services—Specialized applications drive development
- Application solutions—Pan-European integration challenge
- Systems software products—Downsizing drives down growth

E-CT-3a

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Delivery Mode Trends

- Professional services—Competitive pressure increases
- Equipment services—Multivendor maintenance and environmental services grow

E-CT-3b

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Competitor Trends

- Equipment manufacturers
- Management consultants
- Telecommunication companies
- Product distributors
- Software vendors

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Trends

Equipment Vendors

- Systems integration
- Services products
- Environmental services
- Reducing costbase
- Alliances/acquisitions

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Trends

Management Consultants

- Full-service versus boutique
- IT skills dominant
- Management advice + implementation
- Competing on price

E-CT-6

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Trends

Telecom Companies

- Deregulation and re-regulation
- Systems integration/alliances
- Pan-Europe network services
- Network-intensive applications

E-CT-7

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Trends

Product Distributors

- Added-value desktop services
- Pan-European alliances
- Corporate/multinational sales
- Desktop applications support

E-CT-8

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Trends

Software Products Vendors

- Added-value software services
- Pan-European applications
- Corporate/multinational sales
- Direct aftermarket control

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